



2024 – 2033

# Local Area Action Plan

# Acknowledgement of Country

Across Victoria's Midwest, we acknowledge that we travel across the ancient landscapes of many First Peoples communities.

These lands have been nurtured and cared for over tens of thousands of years and we respect the work of Traditional Custodians for their ongoing care and protection.

We recognise the past injustices against Aboriginal and Torres Strait Islander Peoples in this country. As our knowledge grows, we hope that we can learn from their resilience and creativity that has guided them for over 60,000 years.

As we invite people to visit and explore Victoria's Midwest, we ask that alongside us, you also grow to respect the stories, living culture and connection to Country of the Ancestors and Elders of our First Peoples.

Stafford Strategy prepared this document in association with TMV and the Project Control Group established to guide the LAAP's development.

Some ideas and recommendations in this document are those of TMV.

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# Part 1: Executive Summary



Ballarat is an historically significant city northwest of Melbourne. Whether visitors are interested in history, outdoor activities, or simply enjoying the tranquillity of its green spaces. The city offers a diverse range of tourism experiences that cater to a wide array of interests. This makes it a compelling destination for visitors seeking a unique and enriching experience in regional Victoria, Australia.

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

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

This LAAP focuses on City of Ballarat specific recommendations to help guide the City's visitor economy over the next ten years and reflects the needs and responsibilities of the city's First Peoples' organisations, community, industry, and Council.

## Our current visitor snapshot

In 2023, the City of Ballarat attracted 2.9 million visitors who collectively injected over \$772 million into the City's economy.

Despite grappling with the effects of the COVID-19 pandemic, the City has demonstrated resilience. Overnight visitation for year ending September 2023 reached pre-pandemic levels, driven by a domestic visitor market actively seeking an accessible regional destination.

Figure 1: Our current visitor snapshot (2023)<sup>1</sup>



# 2.9 m

## Trips in 2023

72% domestic day trip  
27.5% domestic overnight  
0.5% international overnight



# \$772 m

## Spend in 2023

44% domestic day trip  
55% domestic overnight  
1% international overnight



# 2.0 nights

## Average Length of Stay

<sup>1</sup> September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

# Our visitor economy in 2033

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

Table 1: City of Ballarat forecasts<sup>2</sup>



## Total spending in the City of Ballarat is forecast to reach \$1.13 billion by 2033

Visitor spending in the City of Ballarat is projected to be 60% above the pre-pandemic level by 2033, generating an additional \$424 million in spend (up from \$711 million in 2019).



## Total visitors to the City of Ballarat are projected to reach 4.1 million by 2033, up from 2.9 million in 2023<sup>3</sup>

Growth to the City of Ballarat is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 2.8 million domestic day trip visitors and 1.2 million domestic overnight visitors expected in 2033.

The growth outlook for international visitors has strengthened based on state inbound forecasts, with high growth expected in key markets such as China, India and Southeast Asia.



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

<sup>3</sup> Ibid

# Our strategic framework

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

Table 2: Strategic framework guiding the Sustainable Destination Management Plan



# Our plan on a page

This City of Ballarat LAAP aligns closely with the Tourism Midwest Victoria’s SDMP’s strategic framework (see Figure 2). The targets identified are for the City specifically.

Figure 2: Our plan on a page

## OUR VISION

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

## OUR VALUES

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

## OUR PRODUCT PILLARS

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

## OUR WAY OF WORKING

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

## SOCIAL AND ECONOMIC IMPACT

### MEASURING THE VALUE OF THE VISITOR ECONOMY



### What we strive for

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

Table 3 provides the priority projects that were identified as part of this LAAP. They offer a starting point for activation of this LAAP and a great diversity in scale, type of development, location, and timeframe for activation.

Table 3: Priority local projects

	4-5-star branded hotel in CBD	Lydiard Street Public Realm Revitalisation	Develop 2-3 long destination events for Ballarat aligned with destination positioning for Ballarat	Ballarat Arts and Cultural Area business case development
<b>Type</b>	Supply initiative	Supply initiative	Supply initiative	Demand initiative
<b>Rationale</b>	A new 4-5 star, larger-scale branded property in Ballarat CBD would fill a product gap in the marketplace and offer an accommodation option to meet the needs of business and event attendees, and conference coordinators. E.g. Art Series Hotel.	One of the grandest Victorian era streetscapes in the country, Lydiard Street connects Ballarat Railway Station with many of city's flagship cultural institutions, restaurants, and tourism attractions.  As identified in the City of Ballarat Visitor Arrival Master Plan, the Lydiard Street Public Realm Revitalisation project will support activation, greenification and illumination of this important throughfare, enhancing the arrival experience for pedestrians.	Leveraging the success of Ballarat International Foto Biennale, which is held every two years over three months in Ballarat, the potential exists to look to introduce two to three additional major destination events held over a one to three month period aligned to Ballarat and TMV's brand positioning.	A revitalised Arts and Cultural precinct anchored by key City of Ballarat cultural venues including the Art Gallery of Ballarat and the Ballarat Mining Exchange, creating a vibrant arts hub.  Enhancing this precinct within the Ballarat CBD will directly benefit both residents and visitors.
<b>Actions</b>	<ol style="list-style-type: none"> <li>1. Prepare feasibility and business case to identify art series style hotel accommodation opportunities and encourage operators and their investors.</li> <li>2. Investigate opportunities for co-located conference/event facility for up to 500 patrons.</li> <li>3. Prepare investment prospectus for sending to investors.</li> </ol>	<ol style="list-style-type: none"> <li>1. Seek funding</li> <li>2. Complete Detailed design and engineering</li> <li>3. Undertake works in 3 Stages: <ul style="list-style-type: none"> <li>■ Stage 1 – Lydiard St N (between Mair St and Sturt Street) - Stage One will focus on the core segment of Lydiard Street North with key tourism product and the location of the future Ballarat Arts and Culture Area including the Ballarat Art Gallery, the Mining Exchange, and Regent Cinemas.</li> <li>■ Stage 2 – Lydiard St N (between Doveton Cres and Mair St)</li> <li>■ Stage 3 – Lydiard St S (between Sturt St and Federation University SMB Campus)</li> </ul> </li> </ol>	<ol style="list-style-type: none"> <li>1. Introduce two to three events that run for approximately one month that could possibly be centred on the themes of rare arts and artisan products, digital art forms and sculpture</li> <li>2. As part of the events, look to integrate art into buildings throughout the city and integrate into CBD walking tours</li> <li>3. Promote alignment with Brilliantly Unexpected regional positioning</li> </ol>	<ol style="list-style-type: none"> <li>1. Undertake business case in close consultation with community and stakeholders investigating new gallery space exhibitions; increased storage space; makers spaces and arts incubators; enhanced outdoor space; and spaces for private sector investment in food and beverage, retail and visitor accommodation</li> </ol>

	Sovereign Hill Gold Pavilion	Armstrong Street North as a CBD visitor economy hub/gathering place	National Centre for Photography	Repositioning and marketing Ballarat
<b>Type</b>	Supply initiative	Supply initiative	Supply initiative	Supply initiative
<b>Rationale</b>	<p>Create a new arrival experience at Sovereign Hill, including the delivery of a major new visitor experience. The new arrival precinct will increase capacity to serve Sovereign Hill's forecast visitor growth, enable Sovereign Hill to meet contemporary visitor expectations, increase accessibility and inclusion, and provide a compelling new First Peoples welcome</p>	<p>Ballarat is becoming increasingly well-known for its food offer, home to three hatted restaurants as well as several other high-quality and diverse restaurants, bars, and cafés.</p> <p>There is a need, however, to elevate the profile of Armstrong Street North as a visitor economy hub and gathering place. This could include investigating the following:</p> <ul style="list-style-type: none"> <li>■ high-quality streetscape plantings;</li> <li>■ attractive evening lighting;</li> <li>■ outdoor dining;</li> <li>■ wide pavements;</li> <li>■ retractable awnings and/or umbrellas;</li> <li>■ pedestrian passageway between buildings and outdoor tables.</li> </ul>	<p>The heritage-listed Union Bank building is currently being renovated to house the National Centre for Photography and serve as a hub for the Ballarat International Foto Biennale. This multistage project includes galleries, creative residency spaces and a photo lab, as well as accessible restrooms.</p>	<p>Invest in strategic marketing and communications that elevate Ballarat's positioning and increase awareness among target demographics.</p> <p>To effectively stand apart and increase market share, all activity must respond to, and evolve with, consumer trends, data and research.</p>
<b>Actions</b>	<ol style="list-style-type: none"> <li>1. Advocate for the delivery of funding to develop the Gold Pavilion stage of Sovereign Hill's Masterplan.</li> </ol>	<ol style="list-style-type: none"> <li>1. Investigate options for street enhancements for Armstrong Street North to support traffic calming, parallel parking, wider footpaths, improved lighting, and night-time economy activation.</li> <li>2. Work with building owners and operators to develop and implement an improvement scheme for the public realm and the façade of buildings.</li> <li>3. Develop a public-private partnership for development with Council and building owners/operators.</li> <li>4. Promote the area as a gathering place.</li> </ol>	<ol style="list-style-type: none"> <li>1. Continue to support the timely completion of the renovation of the Union Bank Building</li> <li>2. To support the introduction of residency program and other planned initiatives</li> </ol>	<ol style="list-style-type: none"> <li>1. Implement the City of Ballarat's new destination branding</li> <li>2. Continue to undertake consumer trend, data and research to support growth in market share</li> </ol>



# Part 2: Introduction

# Overview and process for developing our plan

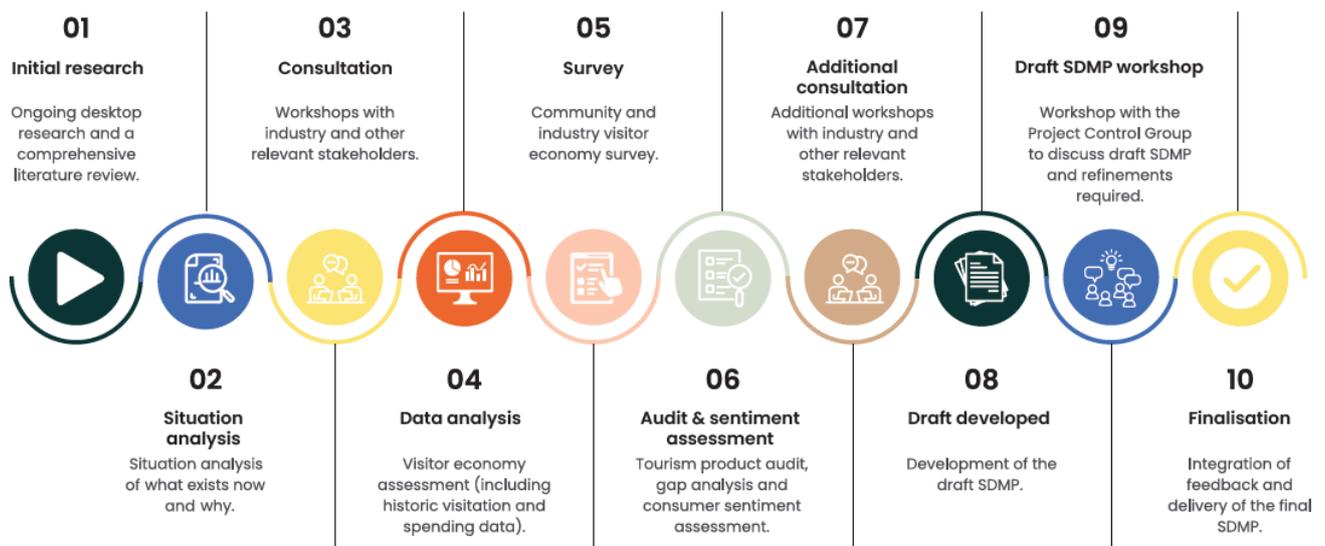
Tourism Midwest (TMV), in collaboration with the City of Ballarat (the City or Council), has developed this ten-year Local Area Action Plan (LAAP) for the City of Ballarat. It has been completed concurrently with the broader Tourism Midwest Victoria Sustainable Destination Management Plan (SDMP) which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

This LAAP is informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, local government staff, councillors, government stakeholders and Traditional Owner Corporations.

## Preparing our plan

The following methodology was undertaken or reviewed to inform this LAAP (Figure 3).

Figure 3: Local Area Action Plan Methodology



## A collaborative approach

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

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

Table 4 provides a summary of those consulted.

A full list of those consulted is included in Appendix 1 of the Sustainable Destination Management Plan.

Table 4: Consultation summary

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

## Phrases and concepts to know

There has been a considerable shift in how destinations view and interact with visitors to ensure tourism benefits the community more broadly. As a result, new concepts and terminology have been introduced to outline the procedures required to achieve these benefits. These are outlined in Table 5. A glossary has also been included in Appendix 2.

Table 5: Terms to know

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

# About the Tourism Midwest Victoria region

## Geography

Victoria’s Midwest is situated approximately 1.5 hours from Melbourne, providing access to a market of just over five million people. It includes the local government areas of Ballarat, Moorabool and Pyrenees as well as parts of Hepburn and Golden Plains (see Figure 4).

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

The region is home to an estimated population of 176,000. About two-thirds of residents live in the City of Ballarat (66%). However, the region is set to experience significant population growth (increasing to over 225,000 residents by 2036), with the City of Ballarat and Moorabool Shire both projected to experience strong resident population growth rates.<sup>4</sup>

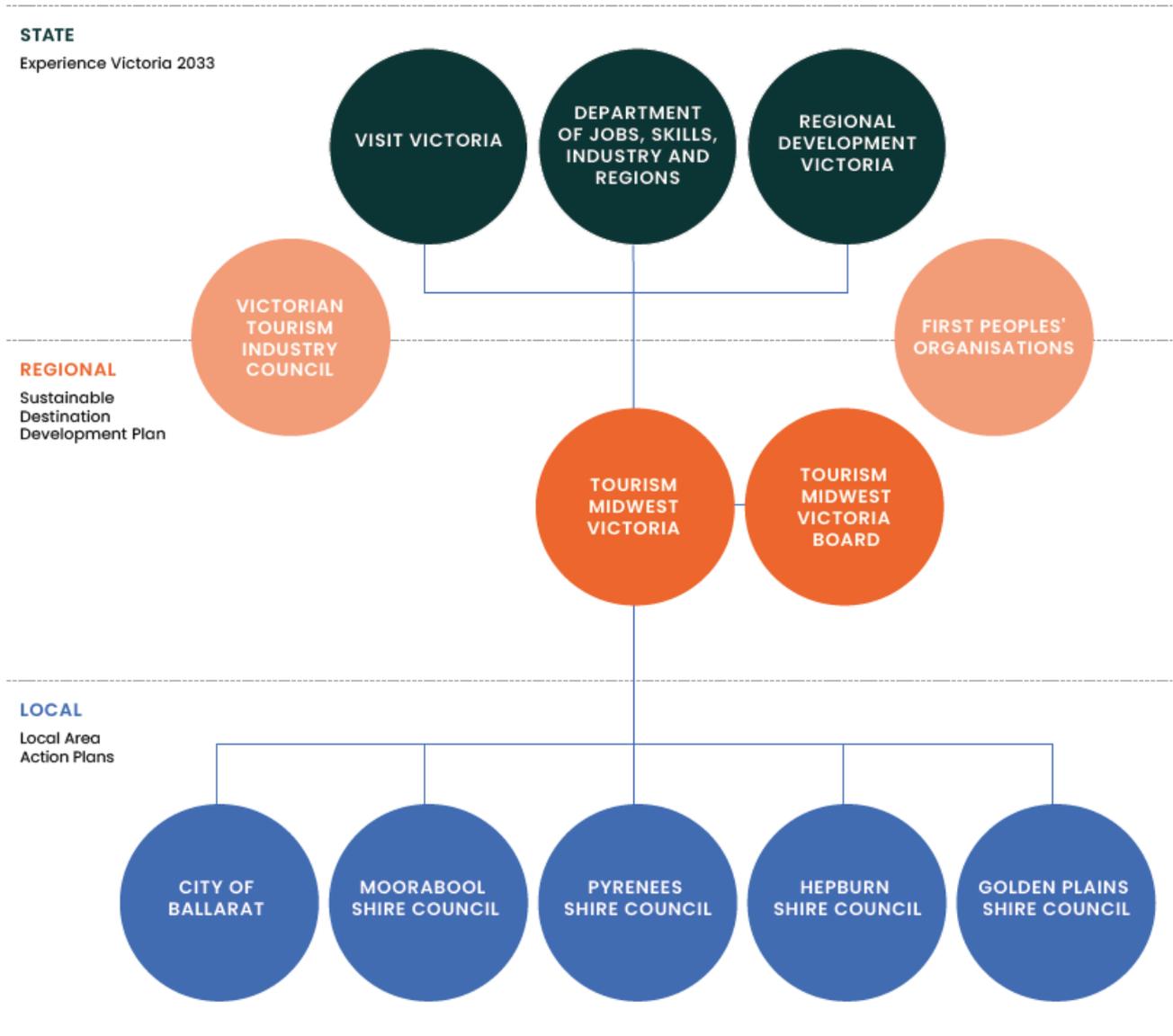
Figure 4: SDMP scope



<sup>4</sup> The City of Ballarat’s population is projected to grow by 27,000 residents (+23%) and Moorabool Shire’s population is forecast to increase by 18,000 residents (+47%) (<https://www.planning.vic.gov.au/guides-and-resources/data-and-insights/victoria-in-future>)

# Governance

Figure 5: Tourism governance summary



## Roles and responsibilities

Destination management consists of the coordinated management of all aspects of a destination that contribute to a visitor's experience. The stakeholders tasked with this responsibility are outlined in Table 6.

Table 6: Roles and responsibilities

Stakeholder	About	Key roles/responsibilities
<b>Visit Victoria</b>	Visit Victoria is the state's official tourism and events agency. Visit Victoria plays a crucial role in promoting the state as a premier tourism destination and driving economic growth through tourism-related activities.	<ul style="list-style-type: none"> <li>• Destination marketing</li> <li>• Guiding regional positioning and development</li> <li>• Supporting industry development</li> <li>• Event attraction and support</li> <li>• Developing collaboration and partnerships to support tourism development</li> <li>• Distributing research and insights</li> <li>• Promoting and implementing sustainable tourism practices.</li> </ul>
<b>Department of Jobs, Skills, Industry and Regions</b>	<p>The Department of Jobs, Skills, Industry and Regions (DJSIR) is focused on creating more opportunities for people through skills development, job creation and business support.</p> <p>Working closely with Visit Victoria, tourism and events is one of DJSIR's areas of focus.</p>	<ul style="list-style-type: none"> <li>• Undertaking research</li> <li>• Providing policy, strategy and industry development advice to the Victorian Government and industry on the visitor economy</li> <li>• Providing governance support and advice to several entities that market the state and secure events</li> <li>• Managing large-scale tourist attractions, precincts, facilities and entertainment venues in Victoria.</li> </ul>
<b>Parks Victoria</b>	Parks Victoria champion the importance of nature by managing, protecting and sharing Victoria's precious places. In partnership with Traditional Owners, they help connect people with Country, understand cultural heritage and contribute to human health and wellbeing.	<ul style="list-style-type: none"> <li>• Sustainably managing, protecting and conserving Victoria's natural and cultural landscapes</li> <li>• Providing experiences for visitors and volunteers to connect with and value nature</li> <li>• Contribute to improving the health, safety and economic wellbeing of all Victorians.</li> </ul>
<b>Regional Development Victoria</b>	Regional Development Victoria (RDV) is responsible for supporting and facilitating economic and social development in regional areas of Victoria.	<ul style="list-style-type: none"> <li>• Managing funding streams and grant programs such as the Regional Tourism Investment Fund</li> <li>• Business investment</li> <li>• Industry support</li> <li>• Advocacy.</li> </ul>
<b>Victorian Tourism Industry Council</b>	The Victorian Tourism Industry Council (VTIC) is the peak tourism industry association that represents the interests of the state's tourism operators and businesses.	<ul style="list-style-type: none"> <li>• Industry advocacy</li> <li>• Policy development (at a state and national level)</li> <li>• Industry support and development</li> <li>• Networking and collaboration</li> <li>• Education and training</li> <li>• The provision of research data and insights.</li> </ul>
<b>First Peoples' organisations</b>	<p>First Peoples' organisations care for Country, and each have their own culture, language, beliefs and practices.</p> <p>Acknowledging this, tourism and the visitor economy have a role to play in promoting culture and building understanding of, respect for, and learning from First Peoples' stories and traditions.</p> <p>More will be done to support the self-determination of First Peoples as they develop visitor economy products and build Midwest's profile in the market.</p>	<ul style="list-style-type: none"> <li>• Cultural heritage management and services</li> <li>• Welcome to Country and traditional ceremonies</li> <li>• Cultural education</li> <li>• Corporate education</li> <li>• Cultural consultation</li> <li>• Land management</li> <li>• Language and naming.</li> </ul>
<b>Tourism Midwest Victoria</b>	Tourism Midwest Victoria (TMV) is the Visitor Economy Partnership which covers the midwestern region of the state. It provides strong leadership and links between communities, all tiers of government and industry. TMV has a skills-based board that comprises of senior local government representatives and industry.	<ul style="list-style-type: none"> <li>• Destination management planning</li> <li>• Destination development</li> <li>• Crisis planning and response management</li> <li>• Industry support and strengthening</li> <li>• Advocacy on behalf of industry and local government</li> <li>• Destination marketing and regional conversion.</li> </ul>
<b>Local government</b>	In Victoria, local government plays a key role in supporting the visitor economy. The five local government areas in Midwest Victoria all deliver services that contribute significantly to the development and growth of the region's visitor economy.	<ul style="list-style-type: none"> <li>• Local tourism promotion and marketing</li> <li>• Provision of visitor information services, often via visitor information centres</li> <li>• Development and maintenance of tourism-related infrastructure including facilities such as parks, recreational areas, signage and amenities that enhance the visitor experience</li> <li>• Event support</li> <li>• Industry training</li> <li>• Community engagement to ensure tourism development aligns with community values and aspirations</li> <li>• In times of crisis, local government often plays a role in coordinating responses and providing support to the tourism industry</li> <li>• Regulatory functions related to tourism, including land use planning, zoning and permitting for tourism-related developments.</li> </ul>

## About Victoria's Visitor Economy Partnerships

The Visitor Economy Recovery and Reform Plan released in April 2021 outlined the transition from Regional Tourism Boards (RTBs) to Visitor Economy Partnerships (VEPs).

Under this new model, each VEP will:

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

### Core responsibilities

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

- Deliver enhanced leadership and collaboration at a regional level.
- Tailor industry strengthening support to address regional needs.
- Encourage increased community support for tourism.
- Facilitate enhanced visitor dispersal and experiences.
- Undertake collaborative destination marketing and regional conversion.
- Provide insights and investor connections that inform a strengthened pipeline of product development.
- Provide regional context and insights to inform government policy development, decision making and investment priorities.
- Ensure continued crisis preparedness and support relative to the visitor economy.
- Maintain regular engagement with First Peoples' organisations to ensure their perspectives are considered relative to the visitor economy.

### Core benefits

The VEP framework also outlines the four core benefits:

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

### Key features

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

- Ensure clear roles and responsibilities, including developing a sustainable destination management plan for the region. The plan should be reviewed and updated in three years.
- Establish solid governance with a broad skills-based board and a legal organisation with a clear constitution.
- Encourage regional collaboration by engaging

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

### About the Tourism Midwest Victoria VEP

#### Core responsibilities

The work of TMV is divided into three key areas:

#### Sustainable destination management

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

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

#### Marketing

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

#### Advocacy

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

## Strategic context

Alignment to strategic policy and direction is critical to the success of each LAAP (and the broader SDMP). These strategies outlined in Table 7 provide a range of findings and strategic directions relevant to the development of the region’s visitor economy.

Table 7: Strategies of relevance

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



## About the City of Ballarat

Ballarat is a historically significant city north west of Melbourne. It is situated approximately 115 kilometres northwest of Melbourne and has a population of almost 116,000<sup>5</sup> and serves as the third-largest city in Victoria. Figure 6 on the following page illustrates the scope of this LAAP.

Ballarat gained prominence during the mid-19th century due to the Victorian Gold Rush, which brought a surge of settlers and wealth to the region. It is most famously associated with the Eureka Stockade, a significant event in Australian history that took place in 1854 when gold miners revolted against government authorities.

Primary economic sectors for the City include tourism, education and health care, retail and associated services, manufacturing, and agriculture.

Ballarat blends its rich historical roots with a contemporary cultural scene. Whether visitors are interested in history, outdoor activities, or simply enjoying the tranquillity of its green spaces, Ballarat offers a diverse range of tourism experiences that cater to a wide array of interests. This makes it a compelling destination for visitors seeking a unique and enriching experience in regional Victoria, Australia.

Major visitor attractions in the City include

- Sovereign Hill: This open-air museum is one of Ballarat's main tourist attractions. It recreates the ambience of an 1850s gold rush town, complete with costumed staff, horse-drawn carriages, and interactive exhibits. Visitors can try their hand at gold panning and explore the fascinating history of the era.
- Ballarat Botanical Gardens: These landscaped gardens offer a serene escape with a wide variety of plant species, walking paths, and a picturesque ornamental lake. The Robert Clark Conservatory within the gardens is home to an impressive collection of exotic plants.
- Art Galleries: Ballarat boasts a growing arts scene, with several galleries and cultural institutions. The Art Gallery of Ballarat, one of the oldest and largest regional art galleries

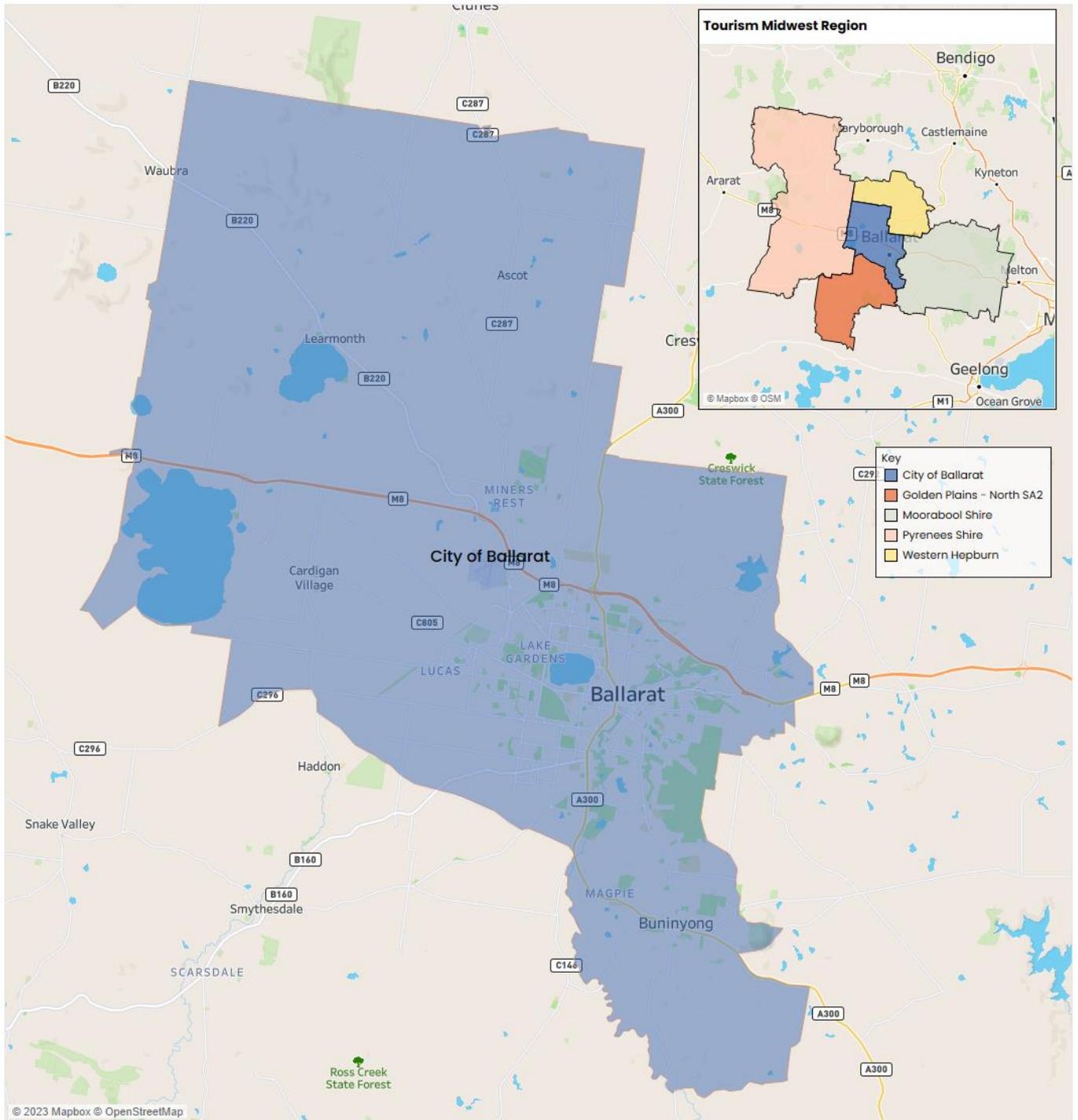
in Australia, features an extensive collection of Australian and international art.

- Lake Wendouree: A popular spot for recreational activities, offers opportunities for boating, picnicking, and walking along its scenic shoreline. The annual Ballarat Begonia Festival held here is a highlight for both locals and visitors.
- Ballarat Wildlife Park: This attraction allows visitors to get up close and personal with native Australian wildlife, including kangaroos, koalas, and a variety of bird species.
- Goldfields Track: For outdoor enthusiasts, the Goldfields Track is a network of walking and cycling trails that pass through some of the region's most picturesque landscapes.
- The Eureka Centre: The Eureka Centre is a cultural and historical institution dedicated to preserving and showcasing the history and significance of the Eureka Stockade, a pivotal event in Australian history.
- Ballarat Tramway Museum: A unique experience for those interested in the history of transportation. Visitors can take a ride on vintage trams and learn about the city's tramway heritage.
- Local Food and Wine: Ballarat's dining scene has flourished in recent years, offering a range of culinary experiences. Visitors can savour regional and international cuisine in the city's many cafes and restaurants. Additionally, the region is known for its wineries and craft breweries.

As the City of Ballarat is the major visitor destination and significant urban hub in a very wide regional catchment area, how it performs as a visitor destination has a bearing on the success of the surrounding region. Surrounding areas need to be able to leverage strongly off Ballarat, including its positioning as a unique and "must-see" destination, its evolving product base, and its ability to appeal to key visitor markets needing to be attracted. These include those coming from Greater Melbourne, surrounding regional areas, other intrastate travellers and those from interstate and overseas. In essence, if Ballarat "thrives" as a visitor destination, the Midwest region should be enjoying the benefits of this.

<sup>5</sup> <https://profile.id.com.au/ballarat>

Figure 6: City of Ballarat mapped scope area



# Our current product offering

## Attractions and Experiences

The Midwest provides a high-quality visitor destination. Ballarat – the major destination hub – offers several major visitor drawcards and the region’s surrounding towns and villages offer a diversity of experiences to broaden the appeal to a wide visitor market.

The primary appeal of Ballarat currently relates to the City’s cultural and heritage-based assets (see Figure 9) including its many museums, cultural experiences, and historic sites. Ballarat is also an events hub and a successful food destination, with many quality and diverse dining experiences on offer.

Emerging strengths for the City (see Figure 10) include its drink product (including a growing number of brewery and distillery experiences) and arts-based experiences.

## Supply Assessment

The following audit is primarily based on an extensive ‘data scraping’ exercise that leveraged the following sources<sup>6</sup>: Tourism Midwest’s database; the ATDW; TripAdvisor; Google Travel; and Google Maps.

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

Figure 7 illustrates the findings of the attractions audit and demonstrates the following.

- Based on the audit findings, there are 115 tourist attractions and experiences in the City of Ballarat.
- Of these attractions, the most common type comprises Historic Sites and Museums (30%) supporting this as an existing product strength for the City.
- The vast majority of products and experiences are clustered around the major destination hub of Ballarat CBD.
- A top-line assessment of free versus paid products was undertaken. This demonstrated that an estimated 55% of the City’s tourism product is free versus 45% being paid. The City has the largest level of paid product in the Midwest region and should continue to build on this strength. While having ‘free things to do’ in a region is an important part of a region’s product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater.

## Consumer Sentiment Assessment

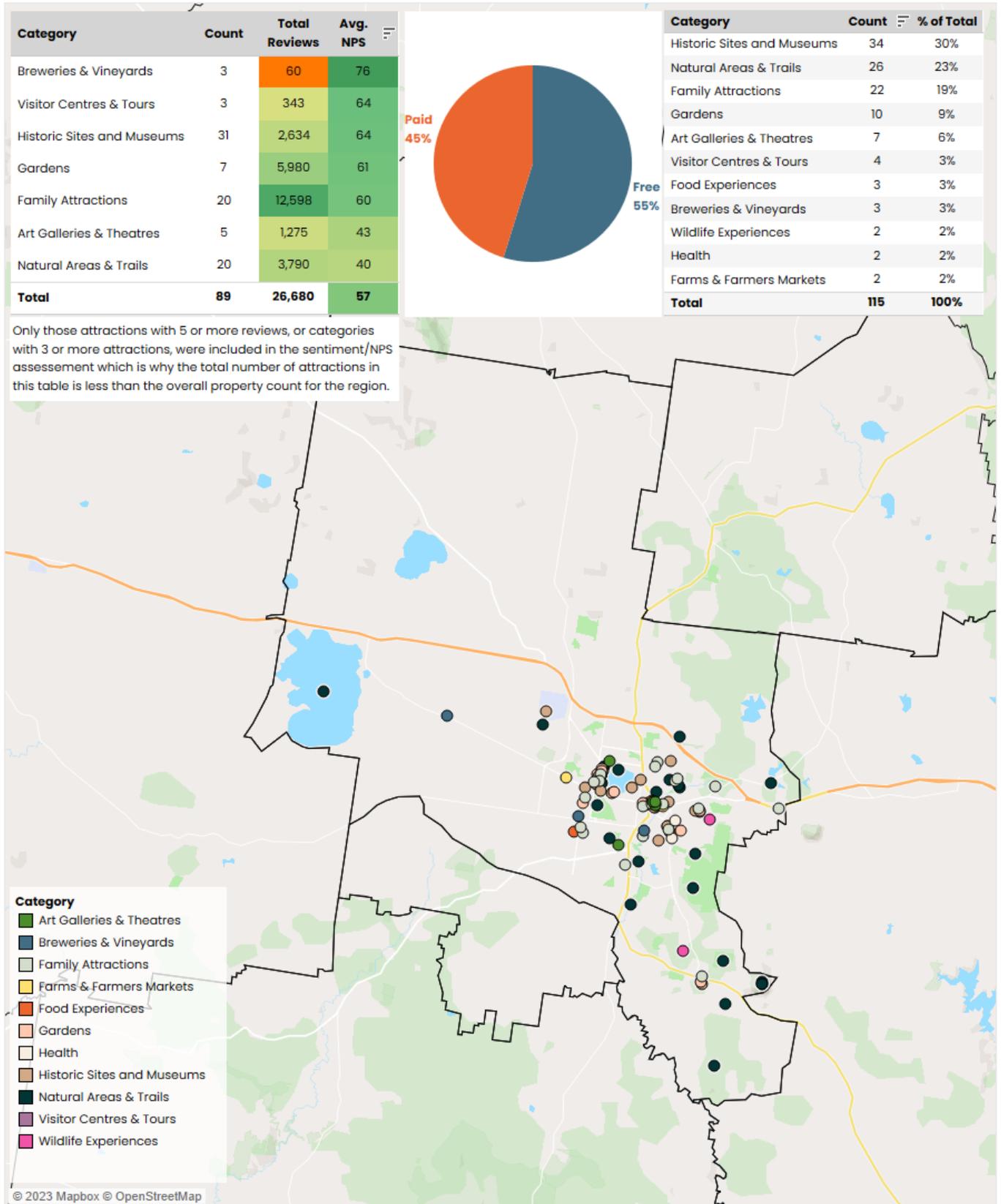
A sentiment assessment was also completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 5 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 7 and demonstrate the following.

- The City’s experiences/attractions product receives an overall NPS of +57, based on 26,680 reviews. This is a strong NPS rating and rates well above the accommodation NPS achieved (+37).
- The product category that receives the highest average NPS score is Breweries and Vineyards, with a high NPS of +76. This is based on 60 reviews across 3 different operators.
- The product category with the lowest average NPS is ‘Natural Areas and Trails. However, the score (+40) is still in the range of a good NPS.
- Paid product has a higher average NPS (+61) than free product (+51) reflecting consumer willingness to pay for product that is of a high enough quality/standard.

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<sup>6</sup> It is important to note, therefore, that the audit may not be fully comprehensive, particularly for those operators who are not listed online. The audit was conducted over the period June – September 2023.

Figure 7: Tourism Midwest Attractions Audit for the City of Ballarat



## Accommodation

The Midwest's accommodation supply is dominated by boutique properties, many of these being short-term holiday rentals. Ballarat CBD offers the largest supply of commercial accommodation.

For the Midwest to achieve its goals of growing overnight visitation and visitor spend, there is a need to stimulate investment into existing accommodation stock and to introduce new commercial accommodation properties. However, most regions throughout Victoria are competing to attract new or refreshed forms of accommodation products which is seen as a clear product gap.

### Supply Assessment

An accommodation audit was completed for the City of Ballarat.

The audit revealed the following (Figure 8).

- The City's accommodation mix is largely supplied through Boutique Accommodation (36%).
- This excludes some Airbnb properties as there is no way to eliminate dual listings across websites, however, a separate audit of Airbnb indicates that there are 1,776 Airbnb properties throughout the Midwest region – 28% (496) of which are in the City of Ballarat. These Airbnb properties have an annual occupancy rate of 58%.<sup>7</sup>
- Although Boutique Accommodation accounts for the most properties (36%), Hotels and Resorts, on the other hand, account for 20% of properties but their bookable unit stock comprises 33% of total bookable units. This demonstrates the importance of commercial properties in supplying year-round larger-scale, bookable room stock for tourism regions.
- While the City has some branded properties, it could benefit from having an internationally branded property invest. Larger, international branded hotel properties especially, can leverage their extensive loyalty program databases to market their properties (and the region) both nationally and internationally and are able to help expand the marketing of the region including in partnership with Tourism Midwest and councils.
- The City needs accommodation investment that aligns with its positioning.

### Consumer Sentiment Assessment

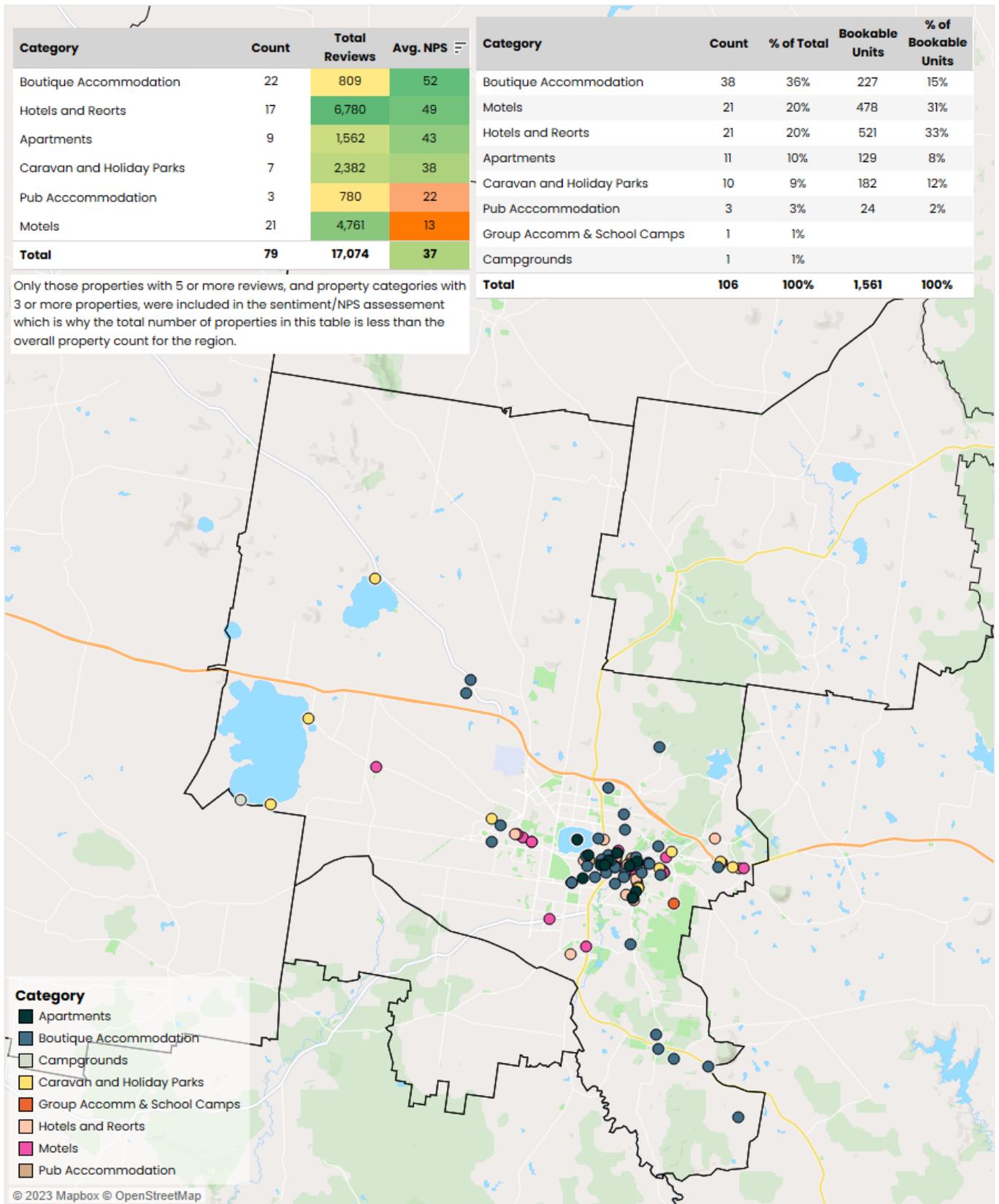
A sentiment assessment was also completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 5 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 8 and the findings are as follows.

- The City's commercial accommodation product receives an overall NPS of +37, based on 17,074 reviews. This falls within the 'good' range for NPS scores.
- The category that received the highest average NPS score is Boutique Accommodation closely followed by Hotels and Resorts. Both these categories receive a relatively strong NPS of +52 and +49 respectively, reflecting a higher degree of consumer satisfaction. However, comparing these upper-end scores with other regions, these are fairly low average scores. By way of example<sup>8</sup>:
- Waiheke Island, a nature-based destination in NZ, scored upper-end average scores of +90 for its Luxury Properties and +70 for its Boutique Properties.
- The Snowy Mountains in NSW received upper-end scores of +68 for its Farm Stay Properties and +90 for its Retreats, Lodges, and Resorts.
- The East Gippsland region received an upper-end score of +64 for its Boutique Properties.
- The NSW North Coast region received upper-end NPS scores of +74 for its boutique product and +72 for its holiday home product.
- Sunshine Coast and Noosa received upper-end NPS scores of +75 for their boutique product, +72 for their holiday homes and +70 for their speciality lodging product.
- Motels, which make up a fairly large proportion of bookable unit stock throughout the City receive a below-average low NPS of +13 (based on 4,761 reviews). This indicates that there are concerns from consumers regarding the quality and price proposition of motel properties in the region.

<sup>7</sup> AirDNA

<sup>8</sup> Based on NPS assessments completed in Stafford.

Figure 8: City of Ballarat Accommodation Audit<sup>9</sup>



<sup>9</sup> Note, bookable unit stock for caravan parks reflects bookable cabins only. It does not include camping sites as for most locations, this data was not available.

## Product Strengths – Primary and Emerging

Figure 9: City of Ballarat's Primary Product Strengths

### Primary Strengths

#### Culture and Heritage



#### Food



#### Family-Friendly Things to Do



#### Events



Figure 10: City of Ballarat's Emerging Product Strengths

### Emerging Strengths

#### Arts



#### Drink



## Gap and challenge analysis

Based on the product audit, consultation findings and site visits, the following product gaps and challenges have been identified (Table 8). These have been linked to the product pillars outlined in Figure 16 on page 39.

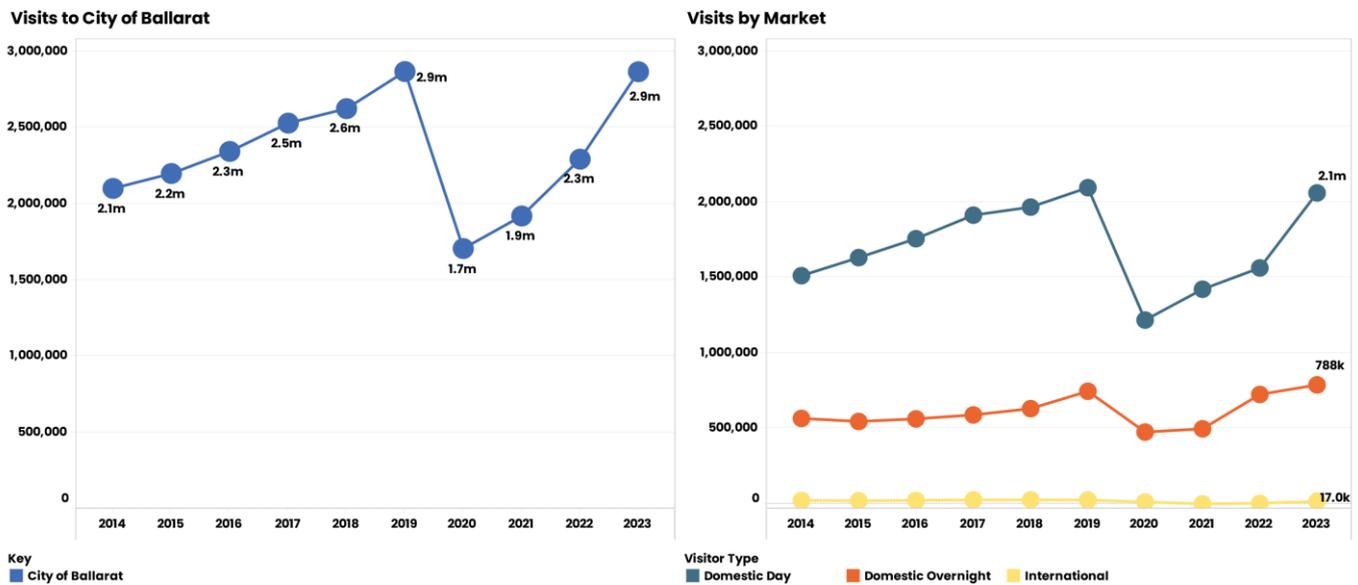
Importantly, by recognising these gaps, opportunities for product development have been identified.

Table 8: City of Ballarat product gap analysis

Our product pillars		Product gaps and challenges	Product opportunity
First Peoples	Traditional Owners storytelling	<ul style="list-style-type: none"> <li>Currently, First Peoples' stories are underrepresented throughout the region.</li> </ul>	<ul style="list-style-type: none"> <li>To incubate First Peoples product and grow representation through partnerships and appropriate product inclusions.</li> <li>To ensure all product development starts with a First Peoples-led approach.</li> <li>To support the development of First Peoples' cultural tourism and experiences.</li> </ul>
People and place	A sense of place	<ul style="list-style-type: none"> <li>Key major attractions require investment to stay current in today's market.</li> <li>Currently, significant historic buildings and streetscapes lack storytelling and activation.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure ongoing investment and product innovation in major attractions.</li> <li>Showcase compelling history.</li> <li>Encourage adaptive reuse.</li> </ul>
	Arts and creatives	<ul style="list-style-type: none"> <li>Current core arts and cultural attractions require investment to meet visitor expectations and industry standards.</li> <li>A lack of coordinated curation and programming of key major venues means the City loses the opportunity to be renowned for any particular offering.</li> </ul>	<ul style="list-style-type: none"> <li>Elevate arts and culture to drive visitation and dispersal.</li> <li>Improve collaboration and coordinated programming across venues, with consideration given to audiences, destination positioning, and product pillars.</li> </ul>
Creative energy	Gastronomic excellence and Agri and growers	<ul style="list-style-type: none"> <li>A coordinated approach to leverage the City's gastronomic story consistently is lacking.</li> <li>The City is not renowned as a leading food and drink destination despite having a number of high-quality F&amp;B providers.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure the City's excellence in gastronomy, viticulture, brewing and distilling is recognised through continuous promotion.</li> <li>Establish a recognised strength in food provenance.</li> <li>Develop a regional food and drink signature experience.</li> <li>Develop Armstrong Street as a major foodie hub.</li> </ul>
Nature at your fingertips	High usage trails and iconic views	<ul style="list-style-type: none"> <li>The City is not renowned for nature-based product.</li> </ul>	<ul style="list-style-type: none"> <li>Leverage proximity to Melbourne, promoting the accessibility of the region's nature product for the time poor or less confident regional traveller.</li> <li>Be known for easily accessible short walks, with views that cater to identified audience segments.</li> </ul>
	Recreation	<ul style="list-style-type: none"> <li>Ensure wide breadth of sporting events strengthen the broader visitor economy.</li> </ul>	<ul style="list-style-type: none"> <li>Enable sporting events to deliver in terms of overnight stays, dispersal, yield and/or brand positioning.</li> </ul>
Enablers	Visitor servicing	<ul style="list-style-type: none"> <li>Visitor servicing does not meet the needs of today's traveller.</li> </ul>	<ul style="list-style-type: none"> <li>Proactive visitor servicing methods to enhance visitation and length of stay throughout the City.</li> </ul>
		<ul style="list-style-type: none"> <li>Lack of accessible transport options.</li> </ul>	<ul style="list-style-type: none"> <li>Support transport and connectivity through the City.</li> </ul>
		<ul style="list-style-type: none"> <li>City and town centres are not compelling for visitors.</li> </ul>	<ul style="list-style-type: none"> <li>Beautification of town centres with consideration of night-time economy, outdoor dining, connectivity, wayfinding and storytelling.</li> </ul>
	Accommodation	<ul style="list-style-type: none"> <li>Shortage of accommodation both in terms of quality, quantity and value proposition.</li> </ul>	<ul style="list-style-type: none"> <li>Attract public and private sector investment for new and enhanced accommodation developments that support the positioning of the city.</li> <li>Develop a new major CBD accommodation property aligned to the City's positioning to support growing average length of stay and grow the city's accommodation offer.</li> </ul>
	Events	<ul style="list-style-type: none"> <li>Opportunity exists to ensure all events, new and existing, develop to be and/or remain destination-driving to grow brand, yield and length of stay.</li> </ul>	<ul style="list-style-type: none"> <li>The City requires events/activations that take place over longer periods and activate after-hours to encourage staying longer in the City.</li> <li>Demarcation needs to be established between community and visitor-driving events through a strategic framework.</li> <li>Homegrown, brand driving, irreplaceable events.</li> </ul>
	Infrastructure	<ul style="list-style-type: none"> <li>Directional and interpretive signage need improvements throughout the City.</li> </ul>	<ul style="list-style-type: none"> <li>Undertake directional and interpretive signage audit to produce a tourism signage strategy for the region.</li> </ul>
	Transport and connectivity	<ul style="list-style-type: none"> <li>Visitor arrival experience via train and buses is lacking.</li> </ul>	<ul style="list-style-type: none"> <li>Undertake streetscaping and other enhancements at arrival gateways.</li> </ul>
Planning and advocacy	<ul style="list-style-type: none"> <li>Challenging for investors and developers to facilitate planning and land use arrangements across the City.</li> </ul>	<ul style="list-style-type: none"> <li>Enable tourism infrastructure growth through advocacy to state and local government to address barriers and support investment in the City.</li> </ul>	

# Our current visitor profile

Figure 11: Total Visitation and visitation by visitor type, 2014-2023<sup>10</sup>



The City of Ballarat has a strong visitor base, receiving 2.9 million visitor trips in 2023. Before COVID-19, visitation to the City was experiencing year-on-year growth, increasing by 37% (767,000) visits between 2014 and 2019. This was driven by strong growth in the domestic day market.

COVID-19, which impacted destinations around the country and globally, saw visitation to the City fall by 72%, or 2.1 million visits from 2019 to 2021.

The recovery from COVID-19 has, however, commenced – with visitation to the City almost reaching pre-COVID-19 levels in 2023. This recovery has been driven by the opening of domestic and international borders and a growth in international traveller confidence.

The domestic day trip market comprises most visitors to the City – making up 72% of visitors in 2023. While the day trip market forms an important component of the visitor economy, it typically is relatively low-yielding, accounting for only 44% of visitor spending in the LGA in 2023, despite comprising 72% of

total visitation. Domestic day trippers, on average, spent \$153 in the City, compared with domestic overnight visitors who spent 3.2 times this amount at \$506 per trip. Higher spending by overnight visitors is generated generally because of additional spending on accommodation, food and beverage, transport and attractions.

A key objective of this LAAP, as noted during the consultation phase, is to grow visitor spending and visitor yield, rather than merely focusing on growing the number of visitors travelling into the region.

There is an opportunity to engage further with international target markets (through collaboration with Visit Victoria and Tourism Australia) as international travel returns, though the core focus should remain on the domestic interstate and intrastate markets. Additionally, attracting domestic culturally and linguistically diverse (CALD) visitors helps build the region’s international profile, as residents often host friends and relatives visiting from overseas.

<sup>10</sup> Based on three-year averages. September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford Strategy.



## Visitor forecasts

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

Supporting data for these forecasts are included in Appendix 6.

Table 9: City of Ballarat forecasts<sup>11</sup>



### Total spending in the City of Ballarat is forecast to reach \$1.13 billion by 2033

Visitor spending in the City of Ballarat is projected to be 60% above the pre-pandemic level by 2033, generating an additional \$424 million in spend (up from \$711 million in 2019).



### Total visitors to the City of Ballarat are projected to reach 4.1 million by 2033, up from 2.9 million in 2023<sup>12</sup>

Growth to the City of Ballarat is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 2.8 million domestic day trip visitors and 1.2 million domestic overnight visitors expected in 2033.

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



<sup>11</sup> Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions ([https://tourism.vic.gov.au/\\_data/assets/pdf\\_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf](https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf))

<sup>12</sup> Ibid

# Visitor Servicing Overview

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

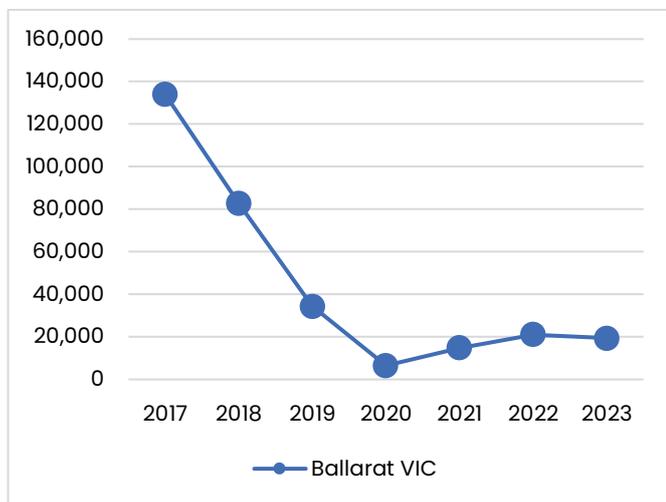
## Visitor Information Centres

The City of Ballarat has one VIC situated in Ballarat CBD (see Table 10). The VIC is accredited. Figure 12 provides a summary of visitation to the VIC over the last seven years.

Table 10: About the VIC

Location
<b>Ballarat Information Centre</b> Town Hall, 225 Sturt St, Ballarat Central VIC 3350 Open Monday – Friday 8.30 am – 5 pm, Saturday – Sunday 10 am – 4 pm

Figure 12: Visitation to VIC, 2017 – 2023<sup>13</sup>



Note: Methodology of VIC visitation statistic changed in 2019 (Prior to 2019 a door counter recorded visitation).

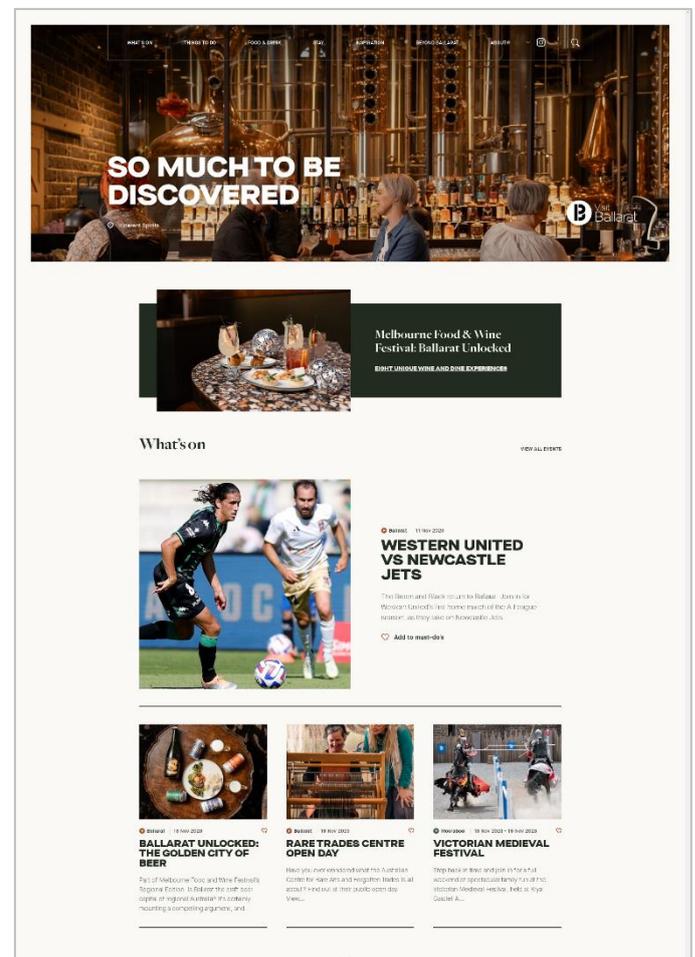
## Digital Content

### Websites

The City has its own destination website, Visit Ballarat (see Figure 13)<sup>14</sup> which is managed by TMV or the City of Ballarat. Tourism operator listings on the website are extracted from the Australian Tourism Data Warehouse (ATDW).

The website is highly attractive and curated and also profiles other destinations in the Tourism Midwest region.

Figure 13: Visit Ballarat website



<sup>13</sup> Provided by Council

<sup>14</sup> <https://www.visitballarat.com.au/>

## Social Media

Social media accounts on Facebook and Instagram are currently owned and managed by TMV (see Table 11). The content is typically highly crafted and generated around what’s on, current events, seasons, and media coverage.

TMV manage an extensive number of social media platforms Facebook, Instagram, TikTok, Pinterest and YouTube.

## Signage and Wayfinding

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

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

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

## Printed Collateral

There are two pieces of official printed collateral produced by TMV to promote Ballarat (and its surrounds). These include the Ballarat Magazine (Figure 14) and a map of Ballarat CBD and its surrounds (Figure 15).

Figure 14: Ballarat Magazine



Figure 15: Official Visit Ballarat Map

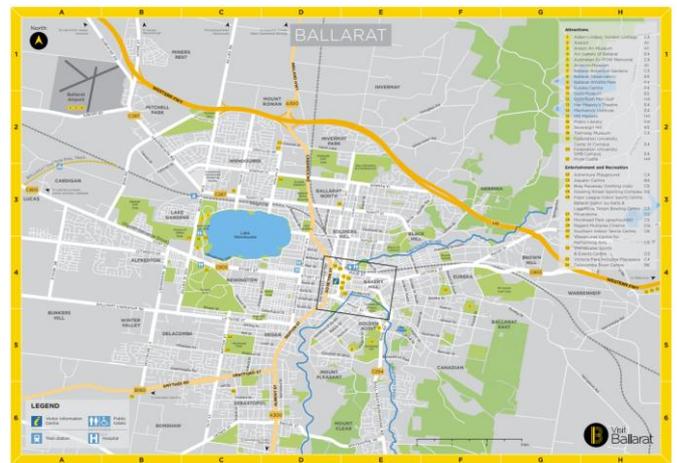


Table 11: Social Media Summary

Platform	Name	Engagement (Followers/Likes)	Posting Schedule
Facebook	Visit Ballarat	73K likes 74K followers	Daily
Instagram	@visitballarat	27.5K followers	Every 2 – 3 days
TikTok	visitballarat	2321 Followers 9808 Likes	Every 4 – 7 days
YouTube	@visitballarat1803	309 subscribers	Sporadically
Pinterest	@visitballarat	212 followers 2.1k monthly views	n/a



# Part 3: Who are our audience segments?

# Our community and the visiting friends and relatives market

The City of Ballarat community holds the key to attracting the visiting friends and relatives (VFR) market. As hosts and trusted referrers, local residents have the greatest influence on how long their visitors choose to stay and how they spend their time and money. The VFR market is a significant market for the region, comprising 35% of all travel to Midwest Victoria<sup>15</sup>. Visiting a friend or relative is the second most common motivator for travel, after leisure-based travel.

To ensure the best possible experience for the VFR market, it is important the community takes pride in their region, is satisfied with the pace and level of tourism development and understands the range of products and experiences on offer.

Research into community hosts and the visiting friends and relatives market was undertaken in 2022, and while its sample was Ballarat residents, many of the findings are pertinent to the broader region. These have been outlined below:

Table 12: Visiting friends and relatives host and visiting friends and relatives market characteristics



## VFR hosts

- VFR hosts play a highly influential role in the destinations visited and the activities undertaken by the VFR market. Given the role of hosts, opportunities exist to market to local communities that influence visitor activities.
- Mature hosts are more at ease with centring a visit around their home. There's an expectation that visitors are motivated by seeing 'me' and thus welcoming them in-home is tied to being a good host. By contrast, younger people are more likely to feel visitors want to make more of their visit and that sitting at home may feel too intensely personal.
- Those with visitors coming from further afield/longer-term/less frequently are more focused on making a special effort. Hosts are compelled to 'impress' visitors by doing something out of the ordinary.
- High volume hosts (those who hosted >10 visitors in the past year) tend to be more socially outgoing. By contrast, some less outgoing hosts may find it more challenging to know where to take visitors (e.g. for dinner/drinks).
- VFR travel drives dispersion and spending – it encourages the VFR host market to try something new.
- A major motivator of visitation for the VFR market is events, with VFR hosts nearly always the instigator of events-based travel (e.g. not the visitor finding the event and inviting the host).
- VFR hosts are often more adventurous in their city because of their visitors (e.g. being pushed to do something different).



## VFR

- Those visiting family:
  - Tend to be older people.
  - Tend to be friends and family groups travelling with children.
  - Spend more nights staying in the homes of relatives or friends.
  - Are more likely to go shopping and spend money on transport, souvenirs and gifts.
- Those visiting friends:
  - Tend to be younger.
  - Spend more nights in commercial accommodation.
  - Tend to travel alone or in groups without children.
  - Tend to spend more on food and drinks, and at pubs and nightclubs.
- There is an increasing trend towards VFRs using commercial accommodation. People are going away on trips less often and want to make their break as stress-free and independent as possible while still enjoying social connections.
- VFR visitors tend to come without a plan (and this appears to be more common in Ballarat than other destinations).
- Being a large centre, local knowledge is felt to be particularly valued in Ballarat. It's not always obvious what to do in the region compared to other destinations.

<sup>15</sup> Based on a 10-year average, September YE (2014 – 2023)

# Our visitors

## Our audiences – a summary

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

Midwest Victoria's, and the City of Ballarat's, target audience segments are explained in Table 13 below.

Table 13: Midwest Victoria's target audience segments



### Regional Fledglings

#### Profile:

- Make more frequent day and short overnight trips than other segments.
- More likely to consider Ballarat in scope for a day trip (if metro-based).
- Are flexible to consider and convert to visiting Ballarat (as well as other destinations).
- Young singles and couples or may travel as groups of friends.
- Metro-based and urbanised tastes.
- Follow emerging trends, not their parents' example.

#### What the market wants:

- Explore through visitor-oriented producers, events/festivals, and local operators.
- Food and wine focus and have the budget to support it.
- Lighter touch in the outdoors, may camp or bushwalk but it's principally a social endeavour.
- By far, the most compelling expression of Ballarat is as a short weekend getaway with a full and interesting itinerary.
- Travel often, but typically on short weekend breaks or day trips.
- Emphasis on Airbnb-type accommodation.
- Trips are commonly based around a half-day hike/bushwalk.
- Modern dining, wineries, craft beer, music events/festivals, novelty and intrigue.



### Mature Tastes

#### Profile:

- More often mature (40+) no kids, kids no longer dependent or kids left home.
- Relaxed budget, though not necessarily high spend.
- Overnight travellers, typically couples but sometimes with friends.

#### What the market wants:

- Value taking it easy and relaxing over a packed itinerary.
- Self-identify as a foodie, make planned dining arrangements and seek out produce.
- Visitation is centred around townships, not nature.
- Schedule a handful of overnight trips per year, tending to be preplanned rather than spontaneous.
- More likely to be led by a female decision-maker.
- Modern food and wine offerings (but in the comfort zone).
- Spending time in picturesque settings (but limited proactive engagement e.g. galleries).
- Higher-end accommodation and booked dining are a must-have starting point. Mature Tastes may look to operators (who specialise in their demographic) to suggest an itinerary.
- More than any other segment, Mature Tastes feel they know the destination and it's essential to inform them that there's more to Ballarat than just the main street.



## Active Regional Explorers

### Profile:

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

### What the market wants:

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



## Family Heartland

### Profile:

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

### What the market wants:

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



## Domestic Culturally and Linguistically Diverse (CALD) visitors

### Profile:

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

### What the market wants:

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



## International high value travellers

### Profile:

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

### What the market wants:

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



# Part 4: What will our future look like?

# Our vision, aspiration and values

The following aligns directly with the vision, aspirations and values developed for the Tourism Midwest Victoria Sustainable Destination Management Plan and is localised to the City of Ballarat for this LAAP.

## Our vision

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

## Our values

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

Table 14: Our values explained

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

## Our success targets

Stakeholders within the City of Ballarat and broader TMV region are dedicated to realising the full benefit of the visitor economy. This extends far beyond traditional economic measurements such as visitor volume and yield.

To measure our success, a series of targets have been developed across the categories of economy, industry, community, culture and environment.

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

economy using established metrics are indicated in Table 15. These targets are benchmarked and forecast based on third-party datasets such as Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS).

There are also a variety of targets that are not so easily measured but which we will strive to achieve as a destination (these are summarised in Table 16. These targets will require the development of some new indicators that will be resourced, activated and reported on going forward.

## Measuring the value of the visitor economy

Table 15: Our success targets (measuring the value of the visitor economy)

	Measure	Target Type	Source/Benchmark	Current (2023)	Goal (2033)
Tier 1 Targets		Visitation	Visitor numbers to the City (day and overnight, domestic and international) as per the NVS & IVS.	2.9m	4.1m
		Visitor spend	Spend by visitors in the City as per the NVS & IVS.	\$577m	\$1.13b
Tier 2 Targets		Ratio of overnight to day visitors	Number of overnight to day visitors as per the NVS & IVS data.	0.39	0.44
		Average length of stay	Visitor nights data divided by visitation data collected from the NVS & IVS	2.0	2.4
		Spend per visitor	Total visitor spend data divided by total visitation data captured from the NVS & IVS	\$201	\$276
		Employment	Tourism employment data from Remplan and Economy ID (sourced from Tourism Satellite account)	2,294	2,523

## What we strive for

Table 16: Our success targets (what we strive for)

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

# Our direction and focus areas

## What will we be known for?

Midwest Victoria and its various LGAs will be known for consistently providing an exceptional and brilliantly unexpected experience. We will do this by delivering products across five curated product pillars that support and amplify this positioning.

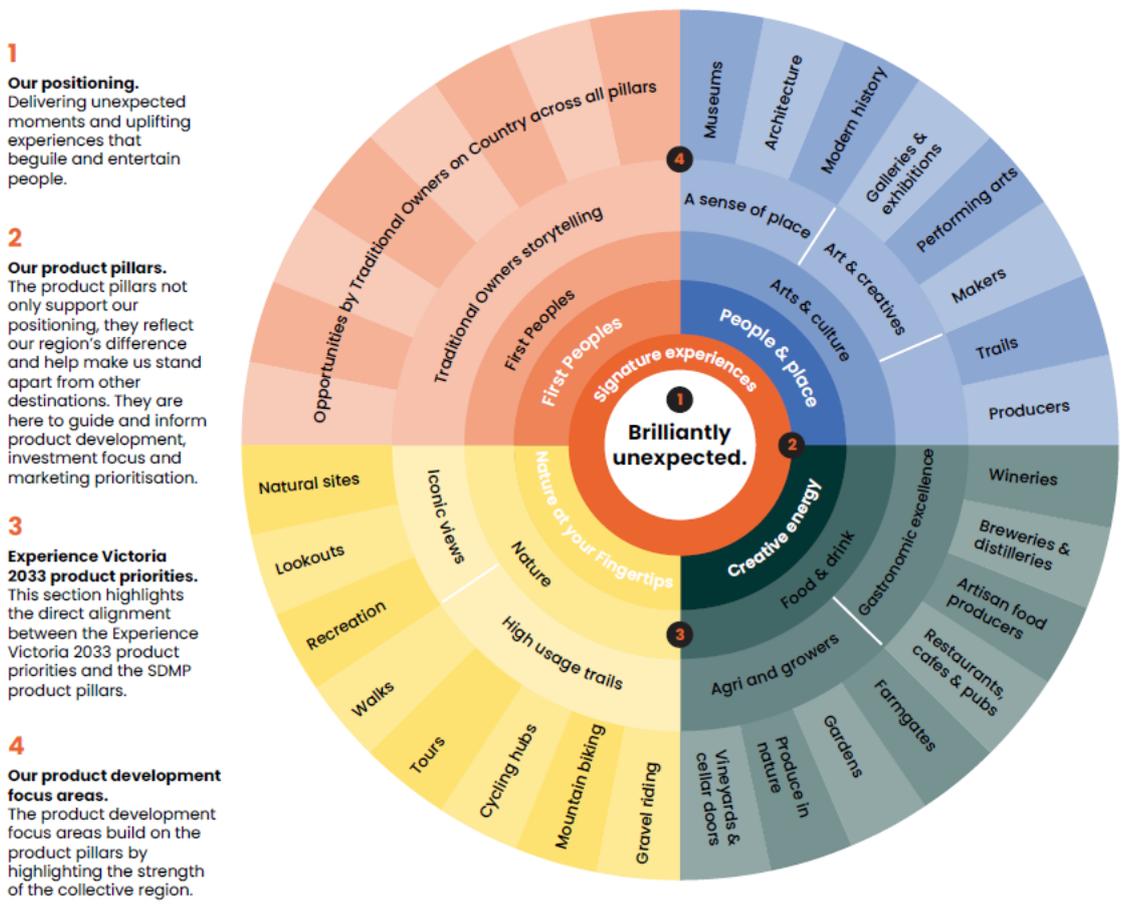
Figure 16 encapsulates the direction for the region that has emerged through the SDMP and LAAP planning processes.

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

The strengths of the City lies in its strong cultural and heritage focus, its food and drink offering, its creatives and the supporting tourism infrastructure it offers as a major regional city.

The City's tourism product aligns well with three of the State Government's tourism product pillars of nature attractions, arts and culture and food and drink.

Figure 16: Our direction and focus areas



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

## Positioning<sup>16</sup>

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

## Product pillars

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

### Signature experiences

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

### First Peoples Culture

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

Two First Peoples groups have Country across the City of Ballarat, including:

- Wadawurrung Traditional Owners Aboriginal Corporation
- Dja Dja Wurrung Clans Aboriginal Corporation

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

### People and Place

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

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<sup>16</sup> In 2023, the City of Ballarat undertook a major piece of strategic work with Melbourne-based brand agency Us+Us to support create an integrated brand identity that established a clear and compelling articulation of our identity, values, and why people should choose our region over other destinations. The strategy and all associated future marketing is intended to reveal Ballarat and its surrounds as a desirable, distinct and multifaceted destination, and to positively reframe how the region is perceived by locals and visitors alike.

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

## Creative energy

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

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

City of Ballarat will continue to capitalise on its creative energy pillar which underpins diverse businesses and experiences throughout the region.

### Nature at your fingertips

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

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

## Enablers

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

## Product development focus areas

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

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

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

# Our way of working

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

Table 17: Our way of working



## Sustainability

Promoting sustainable practices is an essential outcome of this LAAP. This includes identifying ways to minimise negative impacts on the environment, communities and cultures. For the City, this will include the following:

- Encouraging operators to implement sustainable practices including energy-efficient technologies, waste reduction strategies and measuring carbon emissions.
- Involving local communities in tourism planning and development to ensure that concerns and needs are understood.
- Encouraging wildlife conservation efforts and responsible wildlife viewing.
- Ensuring there is respect for local customs and traditions among visitors and cultural sensitivity. This may require providing cultural education and awareness programs to visitors to promote responsible and respectful behaviour.
- Implementing strategies to manage and limit the number of visitors in sensitive or ecologically important areas (i.e. carrying capacities).
- Developing educational programs for visitors to raise awareness about the environmental, social and cultural impact of their visit. It will also involve providing information on responsible tourism practices and encourage eco-friendly behaviours.
- Encouraging visitors to support local businesses, including locally-owned food and drink providers, makers, creators and retailers. This helps in distributing economic benefits more evenly within the community.
- Encouraging the use of sustainable transportation options, such as public transport, cycling, walking and a potential hop-on, hop-off bus. It also involves supporting eco-friendly initiatives like electric vehicles and offsetting carbon emissions through relevant programs.
- Encouraging operators to apply for recognised sustainability certifications and standards, such as EcoTourism Australia, EarthCheck, or Rainforest Alliance (by way of example only). Certification programs can help verify and communicate a commitment to sustainable practices.
- Encouraging operators to implement effective waste management practices, including recycling and reducing single-use plastics. And encouraging visitors to minimise their waste and educating them on proper disposal methods.
- Encouraging or providing ways for visitors to offset their carbon footprint through contributions to carbon offset programs.
- Regularly monitoring and evaluating the environmental, social and economic impacts of tourism activities through the Sustainable Tourism Indicators Research. It also involves using this data to make informed decisions, adjust strategies and continually improve sustainability efforts.



## Accessibility

Encourage stakeholders (public and private) to offer experiences, facilities and services that are accessible and enjoyable for individuals of all abilities. This may include:

- Investing in accessible infrastructure (e.g. the installation of ramps, elevators, accessible bathrooms and other features);
  - Introducing adaptive technologies (such as audio guides, sign language interpretation services and apps with navigation assistance);
  - Offering accessible information; and
  - Collaborating with advocacy groups.
- This will support the region in becoming a destination of choice for all visitors.



## Inclusivity

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

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

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



## First Peoples' engagement and partnerships

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

We will:

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



## Community wellbeing

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

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



# Part 5: Our action plan

## Priority local projects

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

During the LAAP process, a wide variety of initiatives were identified for the City. These projects have been identified, workshopped, and discussed with key stakeholders. Once these projects are underway, consideration can be given to rolling out additional projects identified.

### Project 1: 4-5-star branded hotel in CBD

A new 4-5 star, larger-scale branded property of approximately 140 rooms in Ballarat CBD would fill a product gap in the marketplace and offer an accommodation option to meet the needs of business and event attendees, conference coordinators etc.

While the CBD does have a few high-quality properties, it does specifically lack a higher-quality and larger-scale internationally branded property to support event attendees, the business sector and larger leisure markets.

Importantly, the branded hotel needs to meet and align with Brilliantly Unexpected positioning of Ballarat. As such, a boutique branded hotel should be considered, such as an Art Series Hotel rather than a standard hotel brand (see Figure 17).

Several potential sites could be considered, and the Council is keen to work with potential developers and investors to ensure an optimum location is found.

Noting that there is also a need for a larger-scale conference/event facility (catering up to potentially 500 pax) this could offer a potential combined facility. A feasibility should be undertaken assessing the merit of a co-located hotel and conference/event facility.

Figure 17: Art Series Hotel precedents<sup>17</sup>



<sup>17</sup> The Cullen, Prahan; and The Chen Art Series Hotel, Box Hill



### Project 2: Lydiard Street Public Realm Revitalisation

One of the grandest Victorian era streetscapes in the country, Lydiard Street connects Ballarat Railway Station with many of city's flagship cultural institutions, restaurants and tourism attractions.

As identified in the Ballarat Visitor Arrival Master Plan, the Lydiard Street Public Realm Revitalisation project will support activation, greenification and illumination of this important thoroughfare, enhancing the arrival experience for pedestrians.

Key project components include the following.

- Increased footpath widths with high-quality finishes, including bluestone and granite paving.
- Dedicated cycle lanes, bike parking and tire pumps.
- Pedestrian lighting, moveable street furniture and planter boxes.
- Smart technology street poles with capacity for Wi-Fi, CCTV, and power supply for market stalls and festivals.
- Façade lighting on key landmarks including the Ballarat Railway Station and Mining Exchange.
- Contemporary pavilions and large-scale public artworks containing innovative and immersive art installations incorporating sound design, light and motion technology.
- New pedestrian crossing on Lydiard St from Art Gallery to Cinema.
- New laneway through Regent Cinema to Armstrong St North.

### Project 3: Develop 2–3 long destination events aligned with destination positioning for Ballarat

Leveraging the success of Ballarat International Foto Biennale, which is held every two years over three months in Ballarat, the potential exists to look to introduce two to three additional major destination events aligned to Ballarat’s positioning held over a one-to-three-month period.

Potential themes could include are arts and artisan products, digital art forms and sculpture.

The rationale for holding the events over an extended period is the greater economic benefit that is able to be generated and opportunity for local operators to leverage and package product aligned to the event.

As part of these events, if possible, art should be installed in buildings throughout the city (as is done with the Foto Biennale) and integrated into CBD walking tours.

### Project 4: Ballarat Arts and Cultural Area business case development

A revitalised arts and cultural precinct anchored by key City of Ballarat cultural venues including the Art Gallery of Ballarat and the Ballarat Mining Exchange, creating a vibrant arts hub.

The aim is to create a vibrant arts hub including a contemporary space for exhibition and performance, plus maker spaces. Enhancing this precinct within the Ballarat CBD will benefit both residents and visitors.

Potential components to be investigated as part of the business case include the following.

Potential project components:

- New gallery space for contemporary exhibitions and travelling exhibitions.
- Increased storage to accommodate Ballarat’s large collection.
- Maker spaces and arts incubators to develop local artists.
- Enhanced outdoor space for outdoor events and activations.
- Opportunity for private sector investment in food and beverage, retail and visitor accommodation.

### Project 5: Sovereign Hill Gold Pavilion

Development of a new arrival experience at Sovereign Hill, including the delivery of a major new visitor experience. The new arrival precinct will increase capacity to serve Sovereign Hill’s forecast visitor growth, enable Sovereign Hill to meet contemporary visitor expectations, increase accessibility and inclusion, and provide a compelling new First Peoples’ welcome.

The Gold Pavilion (see Figure 18) will include 880m2 of collection display space and introduce visitors to the key themes of the Living Museum, the significance of the goldrush and its stories including the Diggings, Chinese Village, Mining technologies, key people and time periods along with how to recognise them, and how to explore, participate and engage.

The Gold Pavilion will house three distinct exhibition spaces. It will also contain an immersive retail experience showcasing products being made on site and regionally, with robust and appropriate collections integrated into the entry and orientation spaces to deliver a fully immersive experience.

Figure 18: The proposed Gold Pavilion



### Project 6: Armstrong Street North as a CBD visitor economy hub/gathering place

Ballarat is becoming increasingly well-known for its food offer, home to three hatted restaurants<sup>18</sup> as well as several other high-quality and diverse restaurants, bars, and cafés.

There were two other locations assessed as the CBD visitor economy hub being the southern side of the Ballarat Railway Station and the arts precinct on Lydiard Street centred on the Ballarat Art Gallery and surrounding heritage buildings. A faster activation Armstrong Street North (Eat Street) is possible.

Armstrong Street North is considered Ballarat’s ‘Eat Street’ (see Figure 19), home to a number of the city’s major restaurants and bars including (but not limited to) Hop Temple, Saigon Alley, Eatsy, The Forge, Roy Hammond, Meigas and Grainery Lane.

<sup>18</sup> Underbar, Ragazzone and Mr Jones.

Figure 19: Armstrong Street North, Ballarat



There is a need, however, to elevate the profile of Armstrong Street North as a visitor economy hub and gathering place.

Figure 20 – Figure 22 provide best practice examples of dining precincts and visitor hubs because they offer:

- high-quality streetscape plantings;
- attractive evening lighting;
- outdoor dining;
- wide pavements;
- retractable awnings and/or umbrellas;
- pedestrian passageway between buildings and outdoor tables.

Figure 20: Lygon Street, Melbourne (Outdoor Dining and Street Plantings)



Figure 21: Hastings Street, Noosa (Outdoor Dining & Night Lighting)



Figure 22: Bendigo (Outdoor Dining and Outdoor Activation)



To elevate Armstrong Street North into a true visitor precinct, the following should be investigated. Appendix 7 contains sample schematics for the Armstrong Street North precinct. These include the following.

- Developing a designated area for short-term parking for the collection of takeaways.
- Having part of the street with parallel parking to the curb.
- Integrating a higher level of green landscaping.
- Identifying clever ways blocking off parts of the street to stop the wind funnel effect which occurs at times.
- Installing wider footpaths to allow for more après dining.
- Installing attractive outdoor awnings or similar to encourage outdoor dining.
- Integrating higher quality street furniture.
- Ensuring there is quality and consistent lighting across the street so it becomes far more welcoming.
- Integrating lighting and art installations for surrounding lane ways off Armstrong to link to Lydiard St arts precinct.
- Investigate changing pavement finishes to a more aesthetic finish.
- Investigate implementing traffic calming techniques.
- Investigate the use of hidden bollards which can pop-up to block off parts of the street after 8 pm in summer for food and art-based events (for example).
- Encourage building owners to adopt an improved paint finish (particularly on levels above ground level).
- Investigate ideas to activate levels above ground floors of buildings (e.g., flats, art studios, accommodation etc.).

- Integration of street art as a permanent feature.

## Project 7: National Centre for Photography

The heritage-listed Union Bank building is currently being renovated to house the National Centre for Photography and serve as a hub for the Ballarat International Foto Biennale. This multi-stage project includes galleries, creative residency spaces and a photo lab, as well as accessible restrooms.

## Project 8: Repositioning and marketing Ballarat

Ongoing investment in strategic marketing and communications that elevate Ballarat's positioning and increase awareness among target demographics is vital in continue to position and grow visitor demand.

To effectively stand apart and increase market share, all activity should respond to, and evolve with, consumer trends, data and research.

## Priority local project action plan

Table 18 provides the plan for actioning the various priority projects in this LAAP. The actions are non-exhaustive and will continually need to be updated and refreshed over time. Importantly, these local priority LAAP projects have been determined based on input into the SDMP, local operator feedback, and strategic directions already undertaken by Council into the local visitor economy.

The timeframes included in the action plan reflect the following:

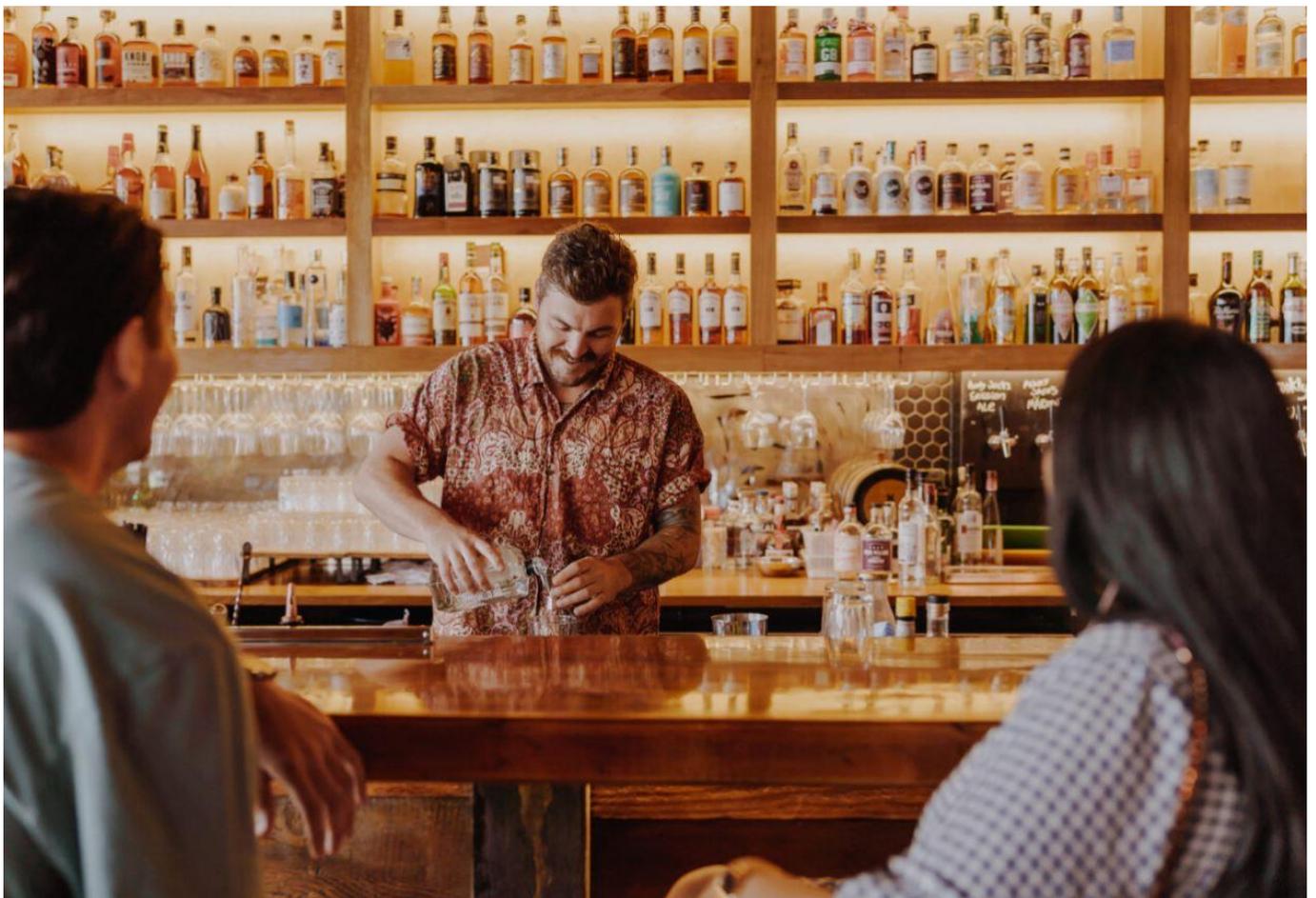
- Short term: 2024 – 2026.
- Medium term: 2026 – 2030.
- Long term: post 2030.

Table 18: Priority project action plan

Project	Recommended actions	Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
4-5-star branded hotel in CBD	<ol style="list-style-type: none"> <li>1. Prepare feasibility and business case to identify art series style hotel accommodation opportunities and encourage operators and their investors.</li> <li>2. Investigate opportunities for co-located conference/event facility for up to 500 patrons.</li> <li>3. Prepare investment prospectus for sending to investors.</li> </ol>	Product dependencies	<p>Feasibility is completed to determine viability.</p> <p>If viable, secure preferred site and investors</p>	\$70m	CoB	Short – medium term
Lydiard Street Public Realm Revitalisation	<ol style="list-style-type: none"> <li>1. Seek funding</li> <li>2. Complete Detailed design and engineering</li> <li>3. Undertake works in 3 Stages: <ul style="list-style-type: none"> <li>• Stage 1 –Lydiard St N (between Mair St and Sturt Street) – Stage One will focus on the core segment of Lydiard Street North with key tourism product and the location of the future Ballarat Arts and Culture Area (BACA) including the Ballarat Art Gallery, the Mining Exchange, and Regent Cinemas.</li> <li>• Stage 2 –Lydiard St N (between Doveton Cres and Mair St)</li> <li>• Stage 3 – Lydiard St S (between Sturt St and Federation University SMB Campus)</li> </ul> </li> </ol>	Product dependencies	Lydiard Street is activated and a pedestrian friendly thoroughfare,	\$25.7m to \$28.2m	CoB, VicRoads, Regent Cinemas	Medium term

Project	Recommended actions	Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
Develop 2-3 long destination events aligned with destination positioning for Ballarat	<ol style="list-style-type: none"> <li>1. Introduce 2-3 events that run for approximately one month that could possibly be centred on the themes of rare arts and artisan products, digital art forms and sculpture</li> <li>2. As part of the events, look to integrate art into buildings throughout the city and integrate into CBD walking tours</li> <li>3. Promote alignment with Brilliantly Unexpected regional positioning</li> </ol>	Signature experiences, People and place, Creative energy	New destination events are developed and patronage grows.	\$750k (\$250k per event)	TMV, arts and cultural community	Short term
Ballarat Arts and Cultural Area (BACA) business case development	<ol style="list-style-type: none"> <li>1. Undertake business case in close consultation with community and stakeholders investigating new gallery space exhibitions; increased storage space; makers spaces and arts incubators; enhanced outdoor space; and spaces for private sector investment in food and beverage, retail and visitor accommodation.</li> </ol>	Signature experiences, People and place, Creative energy	Business case is completed for BACA.	\$400k - \$600k for business case >\$100m for development of BACA	CoB, Art Gallery of Ballarat, Federation University, Creative Victoria, and State Government	Medium term
Sovereign Hill Gold Pavilion	<ol style="list-style-type: none"> <li>1. Advocate for the delivery of funding to develop the Gold Pavilion stage of Sovereign Hill's Masterplan</li> </ol>	Signature experiences, People and place, Creative energy	Funding is delivered and the Gold Pavilion is developed.	-	CoB, TMV, Sovereign Hill	Short term
Armstrong Street North as a CBD visitor economy hub/gathering place	<ol style="list-style-type: none"> <li>1. Investigate options for street enhancements for Armstrong Street North to support traffic calming, parallel parking, wider footpaths, improved lighting, and night-time economy activation.</li> <li>2. Work with building owners and operators to develop and implement an improvement scheme for the public realm and the façade of buildings.</li> <li>3. Develop a public-private partnership for development with Council and building owners and operators.</li> <li>4. Promote the area as a gathering place for the visitor economy.</li> </ol>	Product dependencies	Options are investigated for Eat Street enhancements and, once implemented, vibrancy of the precinct grows.	\$1.1m from Council \$300k from building/business owners	CoB, building/business owners, TMV	Short - medium term

Project	Recommended actions	Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
National Centre for Photography	<ol style="list-style-type: none"> <li>Continue to support the timely completion of the renovation of the Union Bank Building</li> <li>To support the introduction of residency program and other planned initiatives</li> </ol>	Signature experiences, People and place, Creative energy	The National Centre for Photography is developed	\$6-7m	Ballarat International Foto Biennale	Short – medium term
Repositioning and marketing Ballarat	<ol style="list-style-type: none"> <li>Implement the City of Ballarat's new destination branding</li> <li>Continue to undertake consumer trend, data and research to support growth in market share</li> </ol>	Support activities	Destination brand is rolled out, destination awareness grows and consumer research is undertaken on an ongoing basis.	Ongoing annual recurrent marketing budget	CoB	Short – medium term



## Regional projects identified in the SDMP requiring local input

There are several projects identified in the regional SDMP that will require local input to activate or support them. These projects are included in Table 19 and align directly with the SDMP.

The timeframes included in the action plan reflect the following:

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

TMV and the Local Government Areas of the region will need to agree on an equitable formula for funding the various regional SDMP projects which benefit all of the shires within the region. Consideration could be given to a per capita model to reflect the wide-ranging population/rate payer base of the various shires within the Midwest region. There may also be other models which already exist and which apply to other industry sectors of the regional economy.

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

Table 19: Regional projects identified in the SDMP requiring local input

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

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

# No.	Sub-theme	Recommended actions	TMV Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
3.5	Night-time economy	1. Consider a TMV night-time economy plan that identifies intervention concepts for night-time economy precincts, understanding barriers to after-hours activity (including zoning and compliance)	Creative Energy, People and Place	The night-time economy is activated in selected precincts, helping to drive economic growth, enhance cultural and social experiences and create a more dynamic and inclusive community.	\$35k	TMV, All LGAs	Medium term
3.6	Advocacy and support for planning frameworks	1. Undertake a Tourism Planning Zone Study 2. Undertake amendments to planning schemes where required	Support activities, Product dependencies	Barriers to tourism development are more clearly understood and a pathway to resolve these is worked towards.	\$150k	TMV, All LGAs	Medium – long term
3.7	Supporting First Peoples' to pursue self-determined and self-sufficient opportunities	1. Support self-determined First Peoples' plans and priorities 2. Partner with First Peoples to deliver the product in the region 3. Maintain engagement with First Peoples across the region	First Peoples Culture, People and Place	Ongoing relationships built with First Peoples.	-	TMV, All LGAs, Traditional Owners	Medium term
3.8	Unique quality accommodation	1. Conduct a detailed regional accommodation audit including the supply of rooms/bookable units 2. Undertake a detailed Accommodation Opportunities and Investment Study to inform a regional investment prospectus.	Product dependencies, People and place	Appropriately-scaled accommodation that is driving demand for the destination and/or supporting longer visitor stays is developed.	\$45k	TMV, All LGAs	Medium term
4.1	Accessibility	1. Complete a regional accessibility audit 2. Encourage tourism businesses to undertake training inaccessibility needs (including how this can enhance revenue, via case study examples) 3. Develop a promotional campaign profiling the region as an accessible community and leisure destination.	Product dependencies, Guiding principles	The region is positioned as one of Victoria's most accessible tourism destinations.	\$50k	TMV, tourism businesses	Ongoing

# No.	Sub-theme	Recommended actions	TMV Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
4.2	Connected public transport	<ol style="list-style-type: none"> <li>1. Investigate the development of a Hop-On/Hop-Off Transport Shuttle Business Case</li> <li>2. Advocate for public and private transport connections</li> <li>3. Undertake electric vehicle industry advocacy</li> </ol>	Product dependencies, Guiding principles	A connected transport network is available, enabling visitors to travel to destinations with or without a private vehicle.	\$65k	TMV, All LGAs, attraction operators	Short - medium term
4.4	Events infrastructure	<ol style="list-style-type: none"> <li>1. Complete Regional Events Facility and Assets Audit</li> <li>2. Undertake Regional Business Events Venue Feasibility Study</li> </ol>	Product dependencies	Identification of suitable viable event venues.	\$100k	TMV, All LGAs	Medium - longer term
4.5	Integrated transport planning	<ol style="list-style-type: none"> <li>1. Influence and provide advice on local government integrated transport plans</li> </ol>	Product dependencies, Guiding principles	More aligned transport planning resulting in visitors being able to get to and around the region without a car or paid tour.	n/a	TMV, All LGAs	Ongoing
4.6	Investment attraction	<ol style="list-style-type: none"> <li>1. Create a TMV Investment Attraction Strategy and Prospectus</li> <li>2. Continue major project masterplan and funding advocacy</li> <li>3. Advocate for increased worker attraction in the region</li> </ol>	Support activities	Private and public sector investment into priority projects identified within this SDMP.	\$85k	TMV, All LGAs	Short term
4.8	Placemaking, public realm, beautification	<ol style="list-style-type: none"> <li>1. Consider and influence township beautification and activation plans</li> <li>2. Input into the Lydiard Street Public Realm Revitalisation Project</li> <li>3. Input into the Laneway Activation Business Case/Master Plan</li> <li>4. Support the Ballarat Arts and Cultural Precinct Business Case development</li> </ol>	Product dependencies	Visitor satisfaction grows, local communities feel heard and their liveability improves from new visitor infrastructure, capital works and placemaking initiatives.	n/a	TMV, CoB	Medium - long term
4.9	Signage and wayfinding	<ol style="list-style-type: none"> <li>1. Complete a Regional Wayfinding and Signage Strategy and Framework</li> <li>2. Implement and complete the Goldfields Gateways Project</li> <li>3. Incorporate digital storytelling and visitor servicing into new signage and wayfinding projects</li> </ol>	Product dependencies	Visitor and local navigation and interpretation of the region are improved.	\$100k	TMV, All LGAs	Medium term

# No.	Sub-theme	Recommended actions	TMV Product pillar or enabler(s)	Key outcomes	Estimated cost	Who	When
4.10	Tracks and trails	<ol style="list-style-type: none"> <li>1. Develop a Regional Tracks and Trails Network Master Plan (inclusive of walking, cycling, horse-riding and high-usage trails)</li> </ol>	Product dependencies, Nature at your fingertips	Tracks and trail planning are integrated and coordinated moving forward.	\$80k	TMV, Parks Victoria, All LGAs	Medium term
5.1	Destination-driving events	<ol style="list-style-type: none"> <li>1. Develop a region-wide Tourism Events Strategy</li> <li>2. Promote opportunities for food, produce and beverage events</li> <li>3. Develop a program that promotes local produce and farmers' markets</li> <li>4. Identify arts and culture-based events that can occur across the region. Focus on those that can run for longer periods and activate the night-time economy</li> <li>5. Support literary and cultural events</li> <li>6. Develop a major cycling event</li> <li>7. Ensure sporting events in region maximise contribution to the visitor economy through both comprehensive servicing of participants to enhance length of stay, dispersal and spend of participants, and influence sporting events to maximise brand alignment as appropriate.</li> </ol>	Signature experiences, Creative energy, People and place, Nature at your fingertips	Destination-driving events are growing the profile of Midwest Victoria and delivering on our product pillars.	\$200k	TMV, All LGAs	Medium term

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



# Part 6: Appendices

## Appendix 1 Survey Findings



### 72 Responses

- A survey was distributed over 5 weeks to the community and industry throughout the Tourism Midwest region.
- The survey received **201** responses in total.
- Ballarat LGA received **72** responses in total (36% of all responses).
- Overall, the sample size for the total Tourism Midwest Region was robust, achieving a 95% confidence level and a 7% margin of error
- The sample size for the Ballarat LGA survey was also robust, achieving a slightly lower confidence level of 90% and a 10% margin of error.

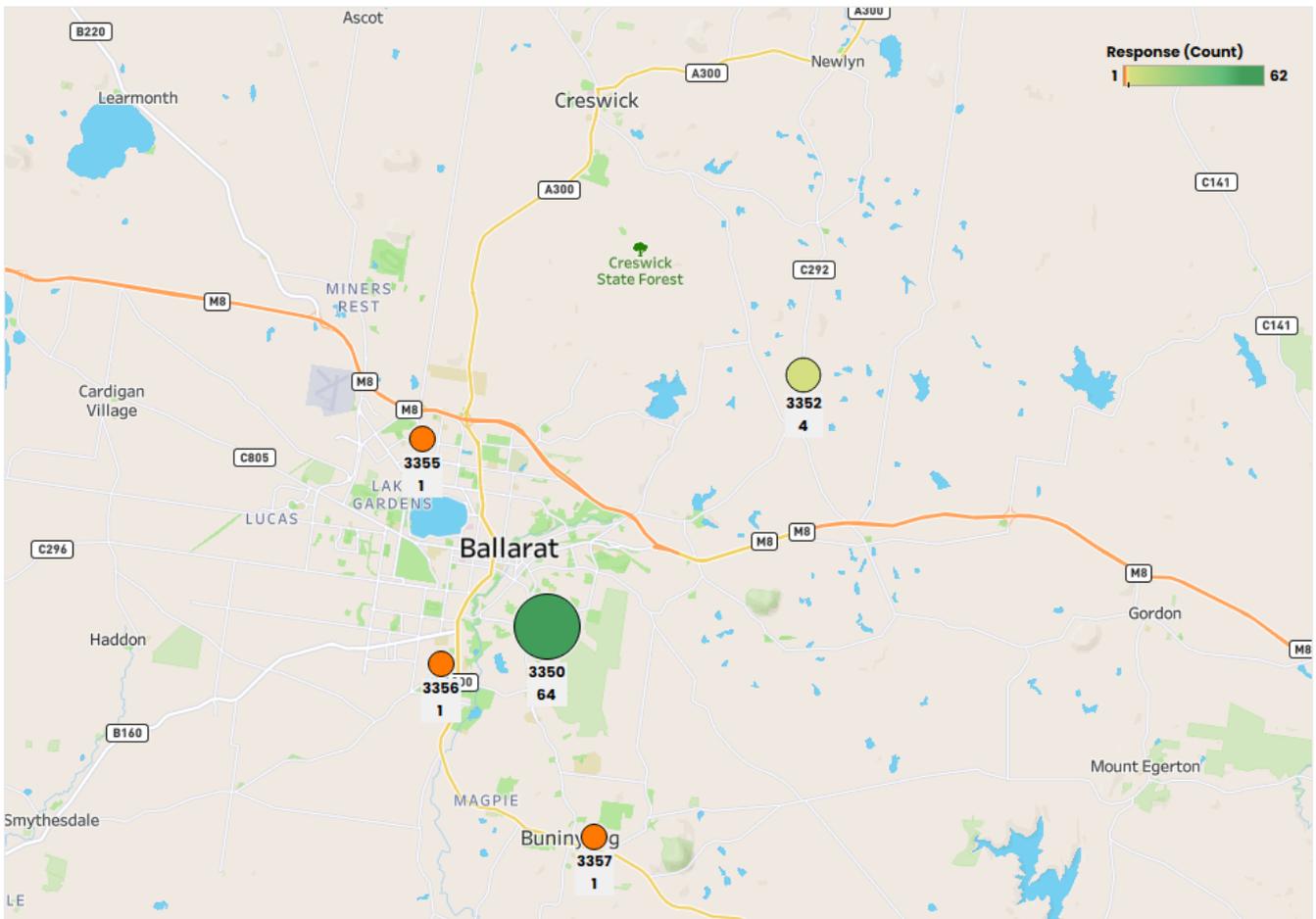
### Question 1

What Council area do you primarily associate with?

### Question 2

- 89% of respondents were from Ballarat City
- Surrounding areas had few respondents
- This reflects where the bulk of businesses are located

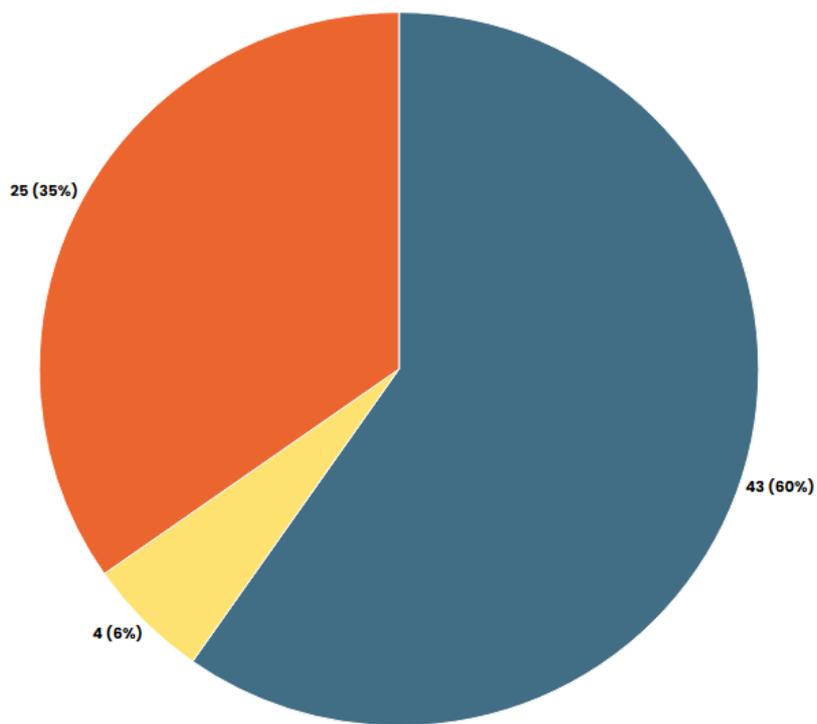
#### 2. What postcode do you primarily associate with?



### Question 3

- A higher % of industry respondents than for the region generally
- Roughly 1/3 are interested community members so a good balance between industry-business respondents (2/3's) and community members

#### 3. In what capacity are you completing this Survey? (City of Ballarat)



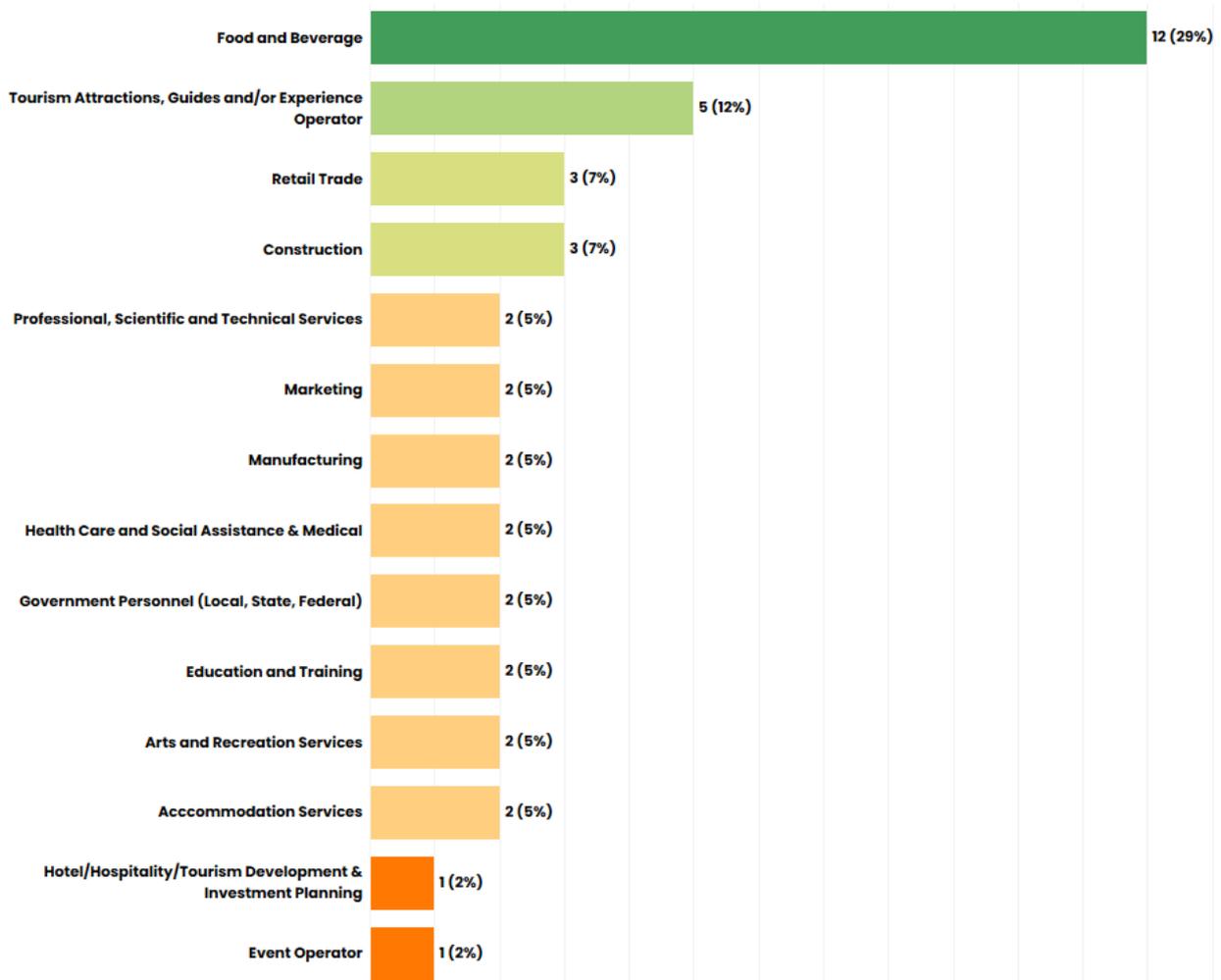
**Response**

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

## Question 4

- Nearly 50% were primarily from the tourism sector
- Compared to the regional split, far fewer accommodation operators responded
- A good range of other sectors of the economy responded as well
- Like the regional results, food and beverage operators were the largest group responding

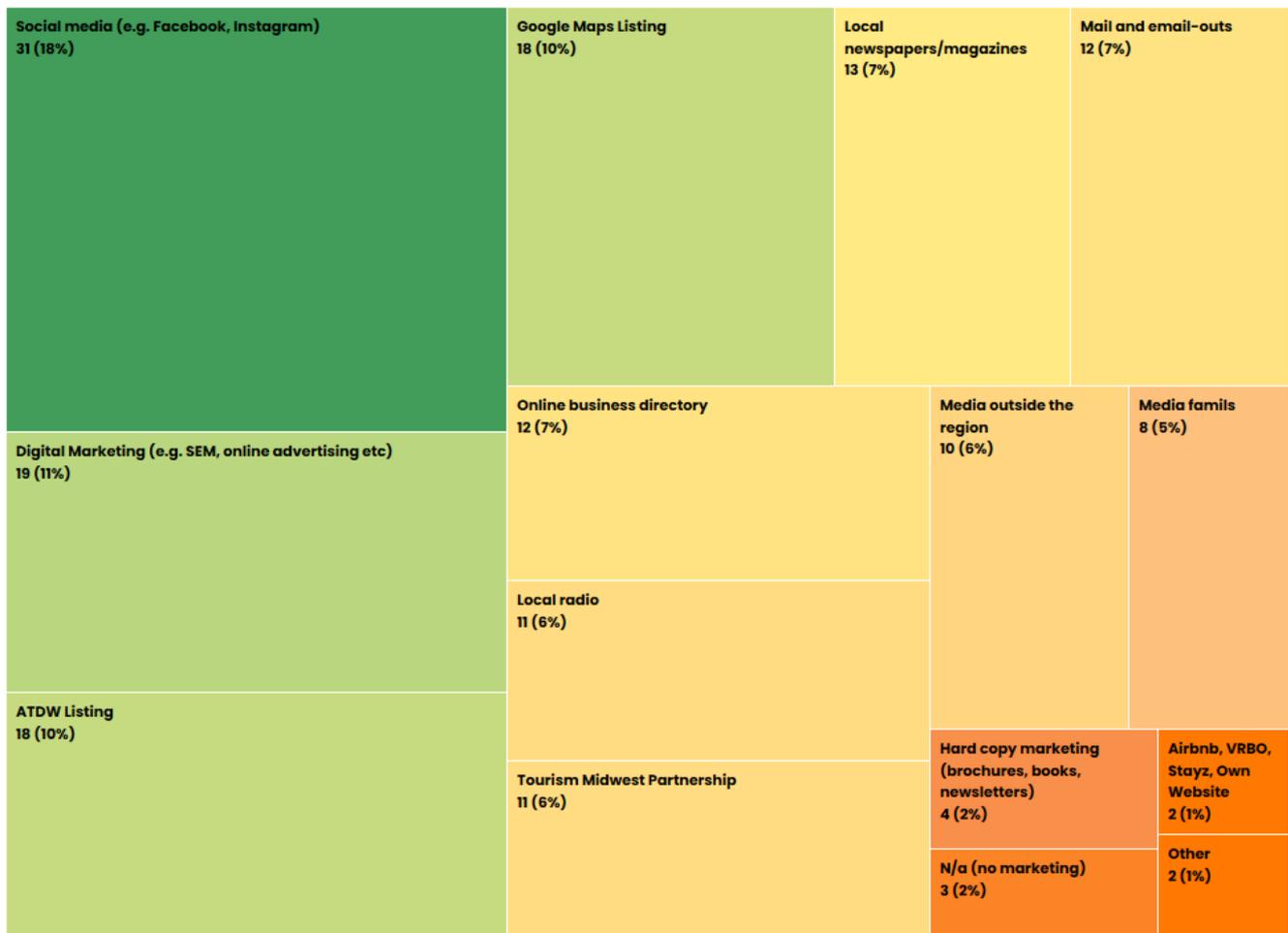
### 4. What best describes your business/organisation (City of Ballarat)



## Question 5

- Social media and digital marketing dominate as primary promotional sources
- 10% are listed on the Australian Tourism Data Warehouse; could this be increased?
- Only 6% noted promotional partnerships with Tourism Midwest;
- 10% indicated they are using Google Maps to list product
- Overall, the importance of online marketing and promotion can't be emphasized enough.

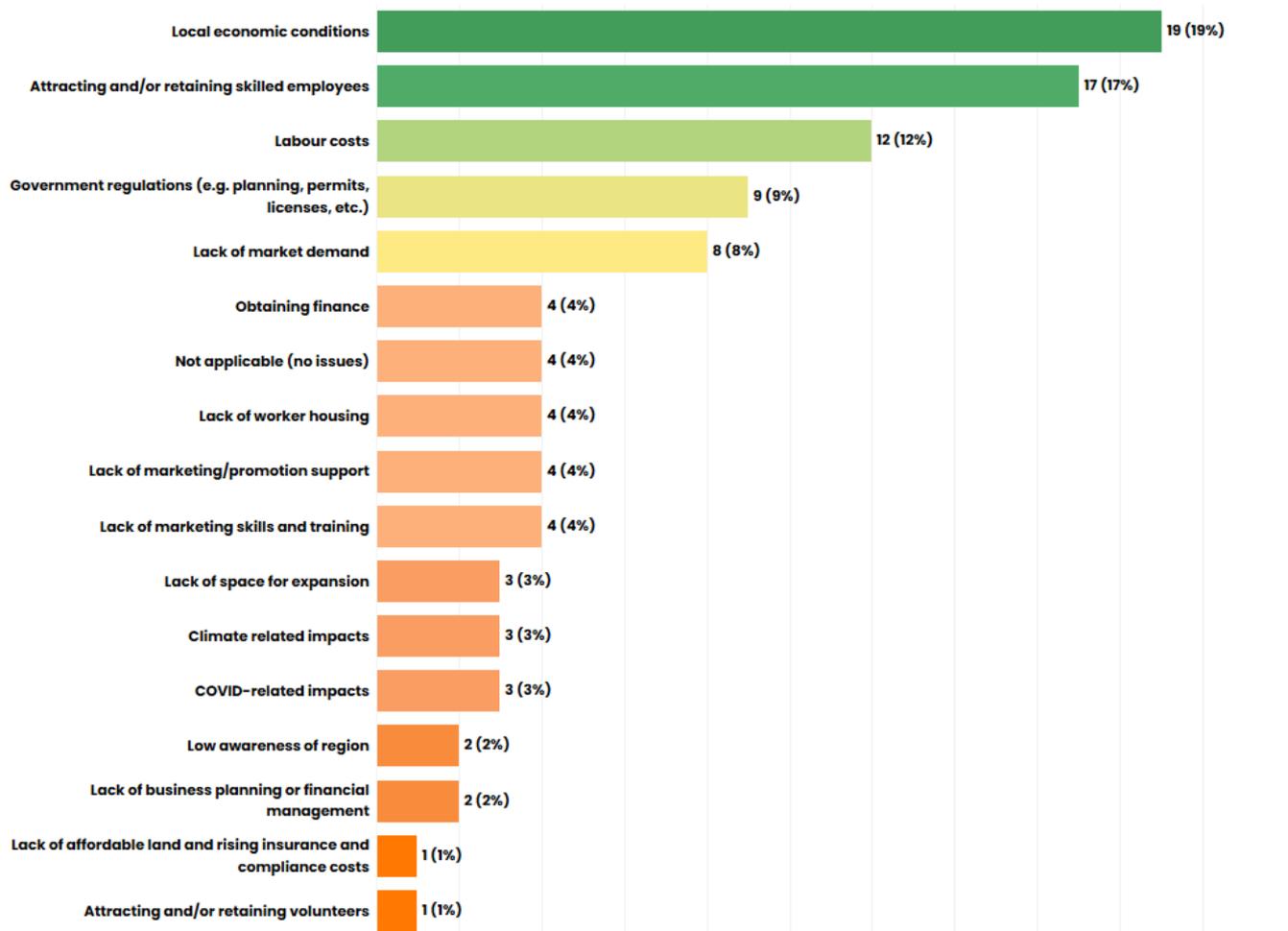
### 5. How is your business/organisation primarily promoted? Select all that apply. (City of Ballarat)



## Question 6

- Major issues mirror the regional prioritisation of these
- Current economic conditions and staffing issues remain the major issues facing industry operators
- Government red tape and compliance requirements are also noted as a major issue. A major area of concern is planning approvals and permits
- Also concern over the lack of market demand for product

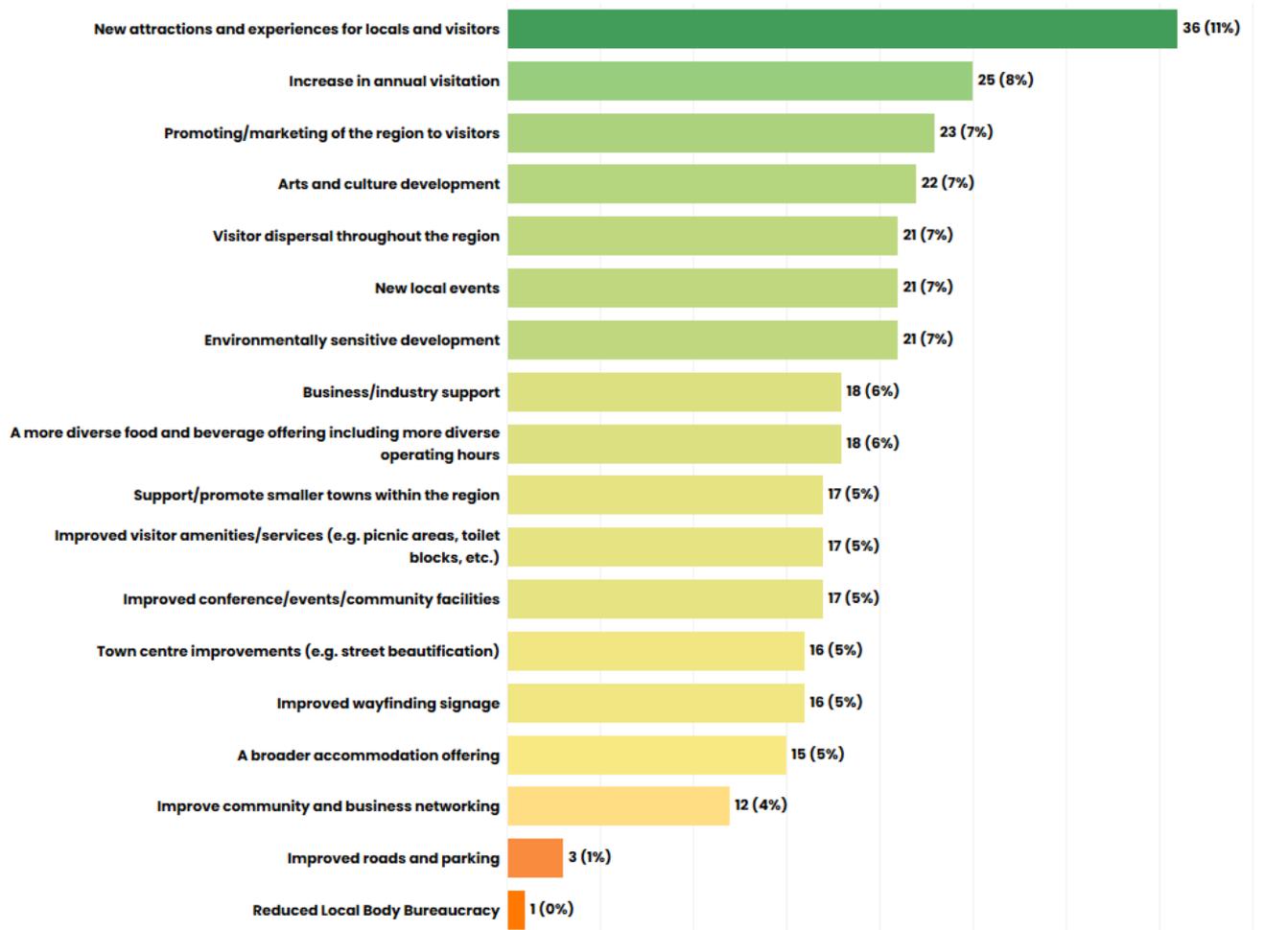
### 6. What issues is your business/organisation facing? Select all that apply. (City of Ballarat)



## Question 7

- The need for new attractions and experiences is the major key outcome
- Improvements in annual visitation rates highly
- As does stronger marketing and promotion of the region to strengthen visitor numbers and spend
- Improvement in arts and cultural development required
- A desire for greater visitor dispersal throughout the region
- A desire for more local events
- And a move toward more environmentally sensitive forms of development required

### 7. What are the key outcomes that this Destination Management Plan should focus on? Select all that apply. (City of Ballarat)



## Question 8

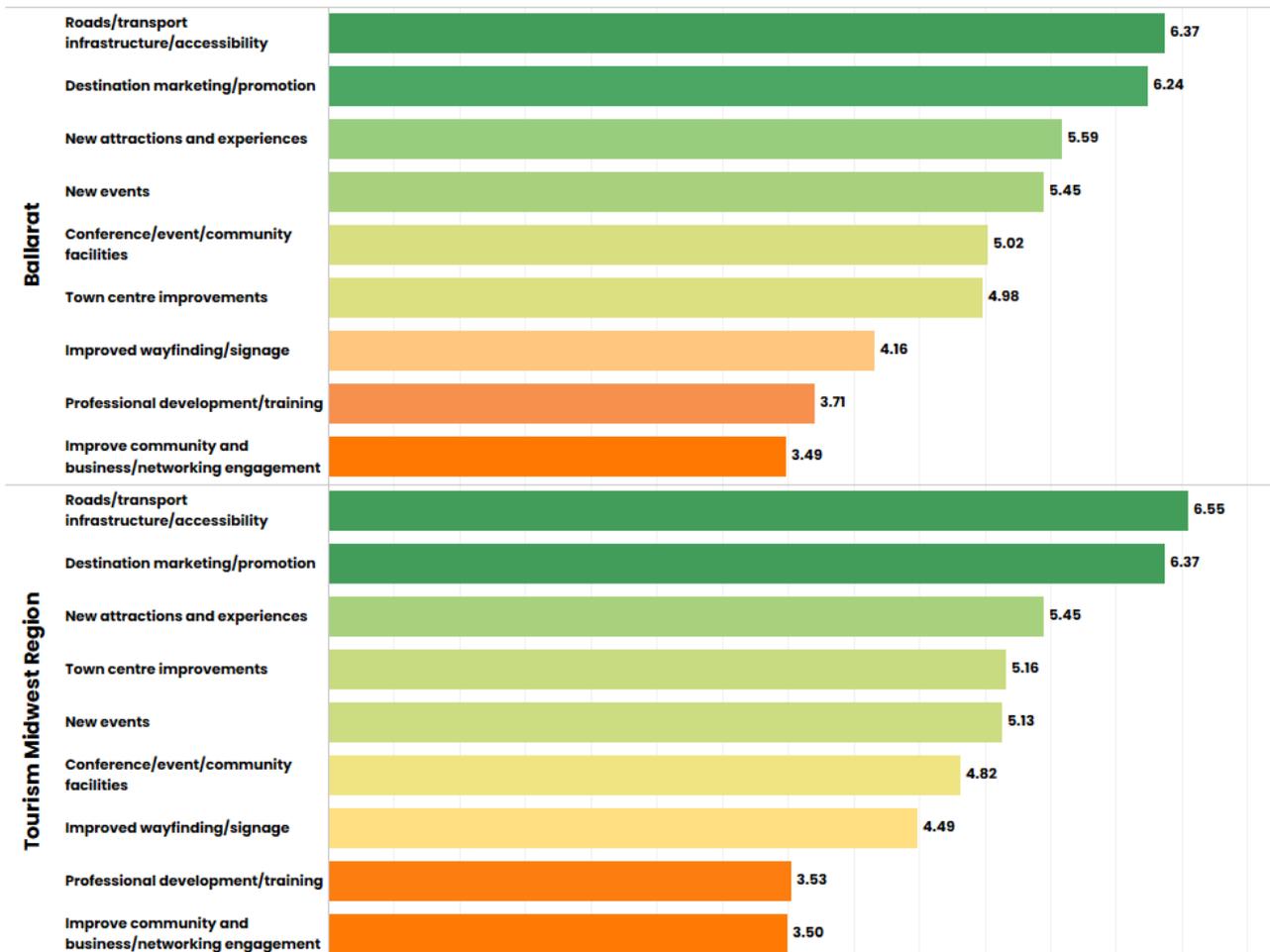
8. If there was one project that deserved priority over others to improve tourism to the region, please provide details below, including a preferred location (Ballarat)

- An information centre with easy access coming into town for tourists with plenty of parking including for caravans.
- Assist Ballarat Tramway Museum to better promote activities and events that will attract further tourists to the region. The museum has a brand-new facility in the Botanical Gardens that can host events and functions, it has the only operating restaurant tram and the original Clifton Pugh Art tram that is stored away plus Australia's oldest operating Horse-drawn tram.
- Ballarat Arts and Cultural Precinct - Lydiard Street, Ballarat
- Ballarat CBA and Station Precinct focus
- Improve the Bakery Hill precinct on arrival into Ballarat. The current first impression of the city is very poor. More green space and underground / all-weather car parking is required.
- Extending hours that cafés are open
- Lake Wendouree as a potential location for a new major attraction
- Mountain bike park
- E-bike trail between Ballarat and Creswick

## Question 9

- Roads and transport infrastructure is the highest-rated item needing attention
- Lack of public transport connectivity
- Lack of sufficient destination marketing and promotion
- Need for new attractions and events

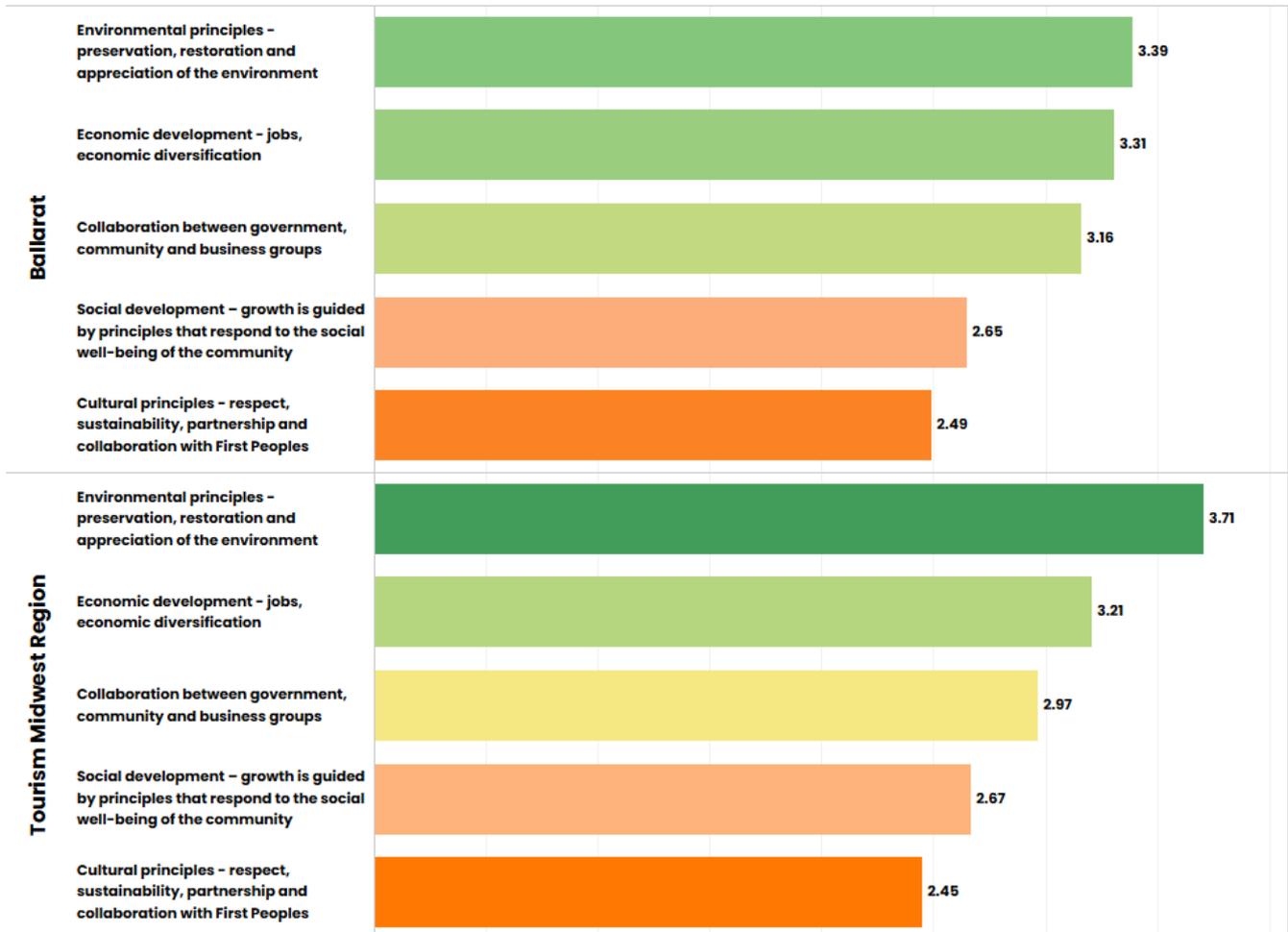
9. Please rank the items requiring attention in the region. (Ballarat & Tourism Midwest Region)



## Question 10

- Environmental principles rated highest for sustainable tourism development
- Economic development and jobs also rated highly
- Need for effective collaboration between public and private sectors and community

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



## Appendix 2 Glossary

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

## Appendix 3 Experience Victoria 2033 Product Priorities and Settings

Figure 23: Experience Victoria 2033 Product Priorities and Settings<sup>19</sup>

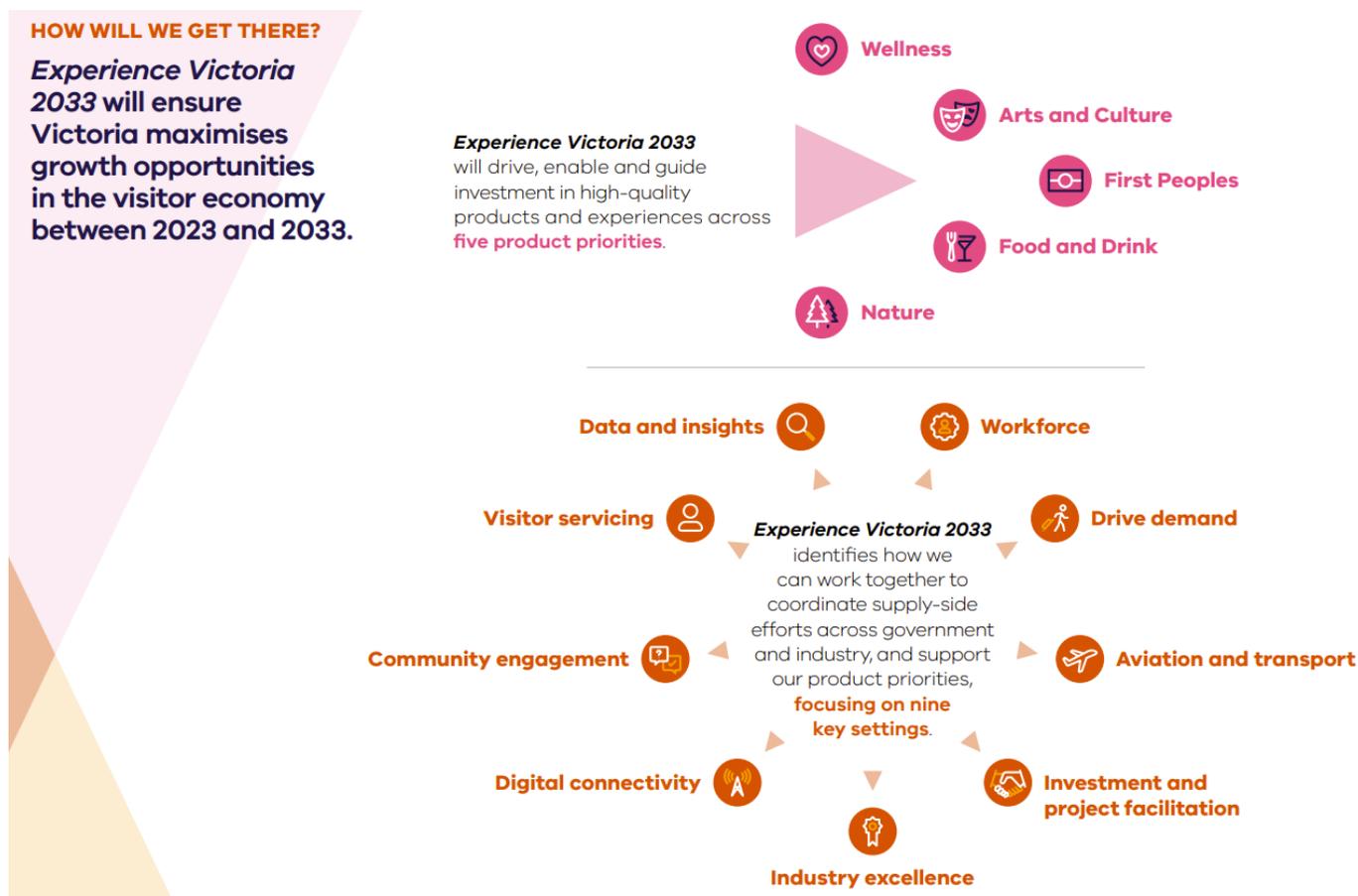


Table 20: Experience Victoria 2033 Product priorities and settings, and alignment with Midwest Victoria

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

<sup>19</sup> Experience Victoria 2033, page 9.

## Appendix 4 Visit Victoria Brand Playbook

Figure 24: Regional sub-brand framework – Goldfields<sup>20</sup>

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

<sup>20</sup> Destination Victoria Brand Strategy, page 24.

## Appendix 5 NPS calculation

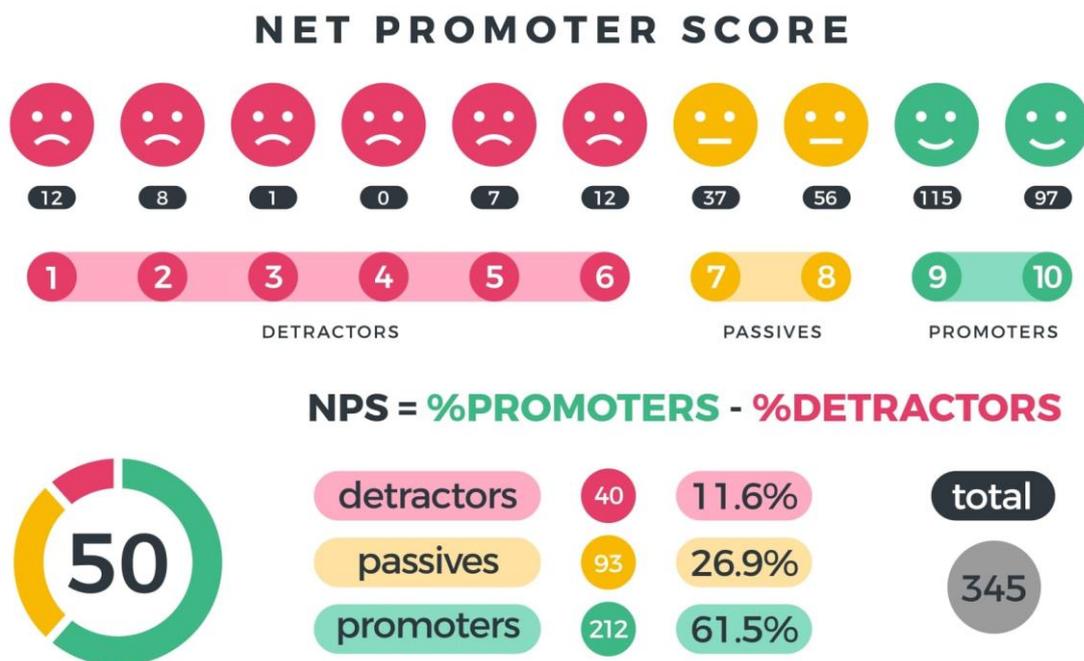
To undertake a top-line assessment of the quality of a region’s product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitor’s willingness to not only return for another stay but also make a recommendation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

The NPS is calculated using a scale (see Figure 25):

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

Tripadvisor and Google<sup>21</sup> use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered “detractors” for the product, a score of 4 is the product’s “passives” and a score of 5 is the product’s “promoters”.<sup>22</sup> Only product with more than five reviews was included in the NPS assessment to ensure a robust sample size.

Figure 25: Net Promoter Score scale



<sup>21</sup> Booking.com has not been used to derive a NPS because it does not provide a scale of scores, but rather, only provides an overall score. Therefore, an NPS is unable to be calculated from Booking.com listings.

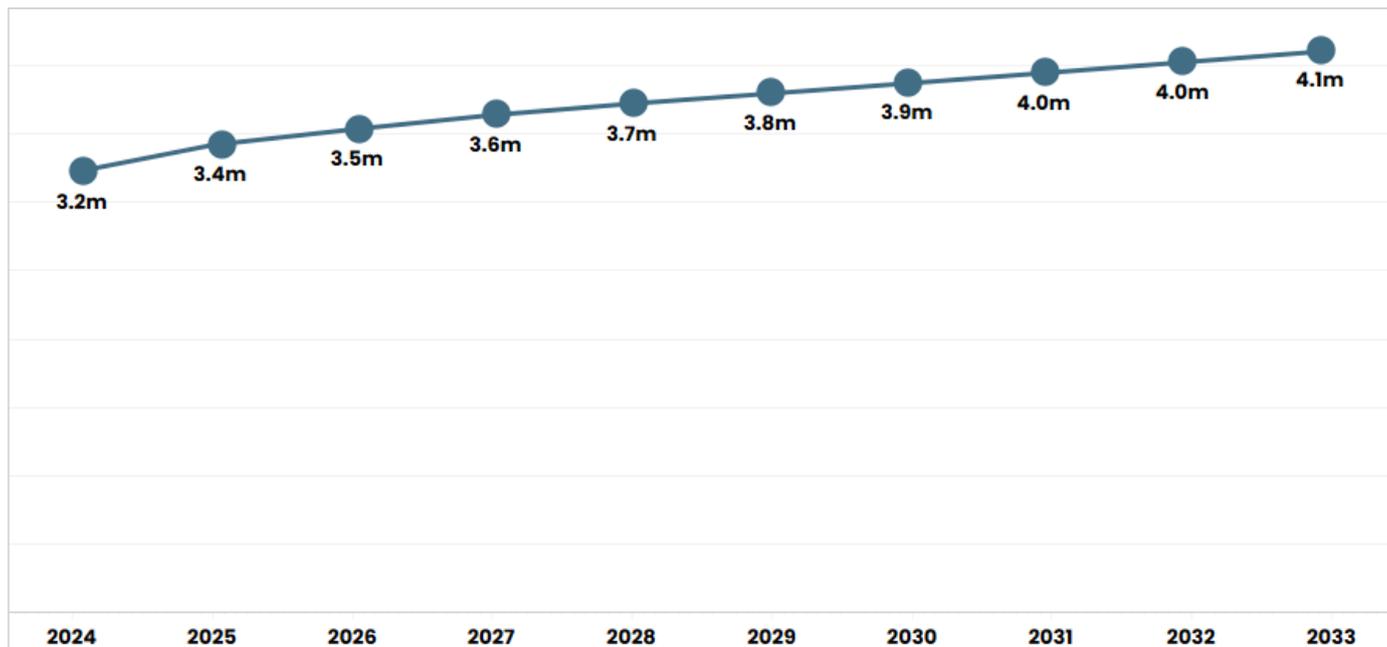
<sup>22</sup> <https://birdeye.com/blog/net-promoter-score-explained/>

## Appendix 6 Visitor forecasts

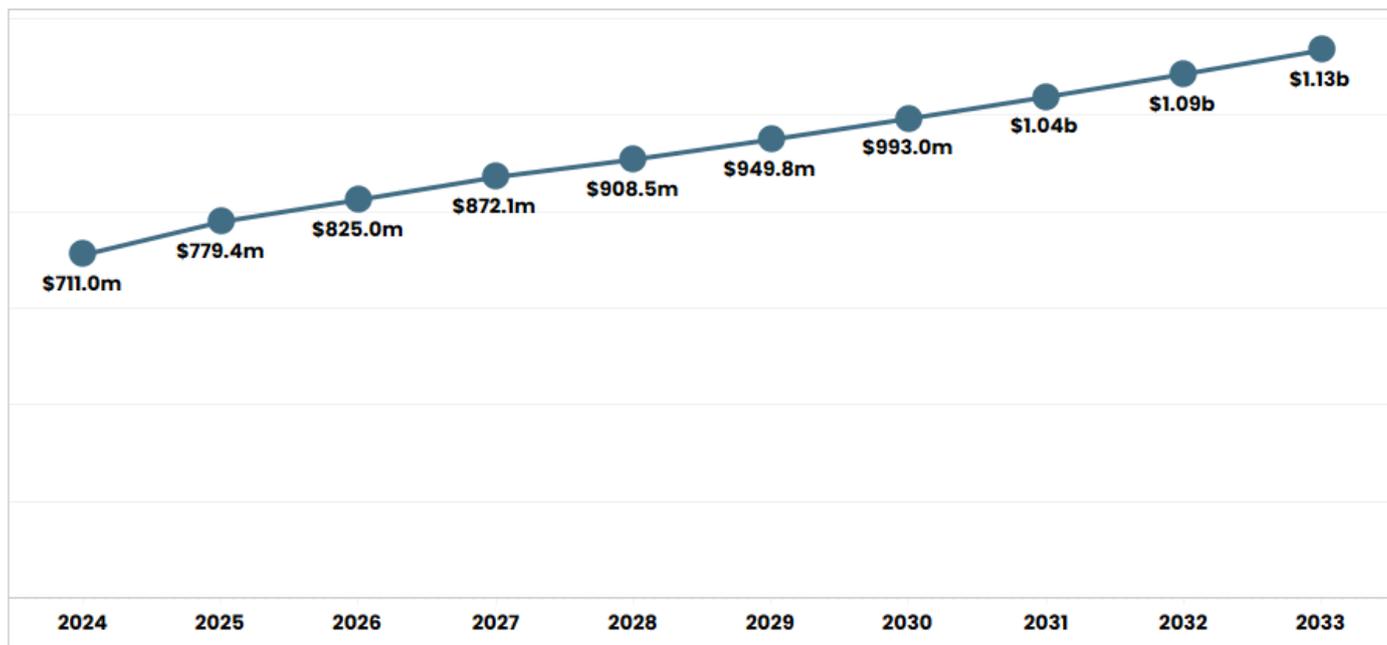
The following provides forecasts for visitor trips and spending to the City of Ballarat from 2024 to 2033. The forecasts have been aligned with the tourism forecasts for Victoria<sup>23</sup>.

Figure 26: Visitor forecasts, 2024–2033<sup>24</sup>

### Visitor forecasts



### Visitor spending forecasts

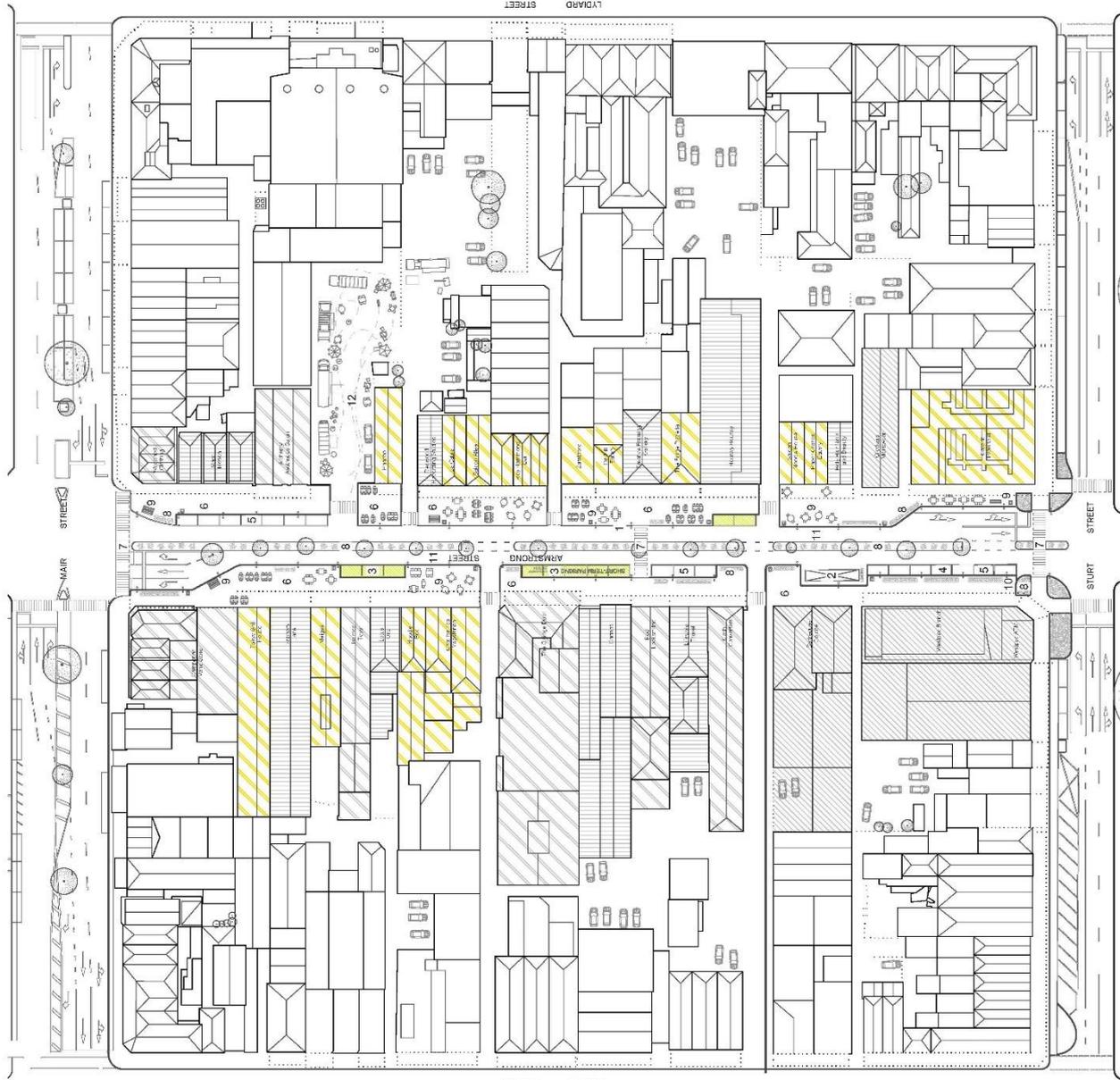


<sup>23</sup> Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions ([https://tourism.vic.gov.au/\\_data/assets/pdf\\_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf](https://tourism.vic.gov.au/_data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf))

<sup>24</sup> Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts.

# Appendix 7 Armstrong Street North Enhancements





- Adjacent Buildings
- Short-Term Parking
- Hospitality Zones

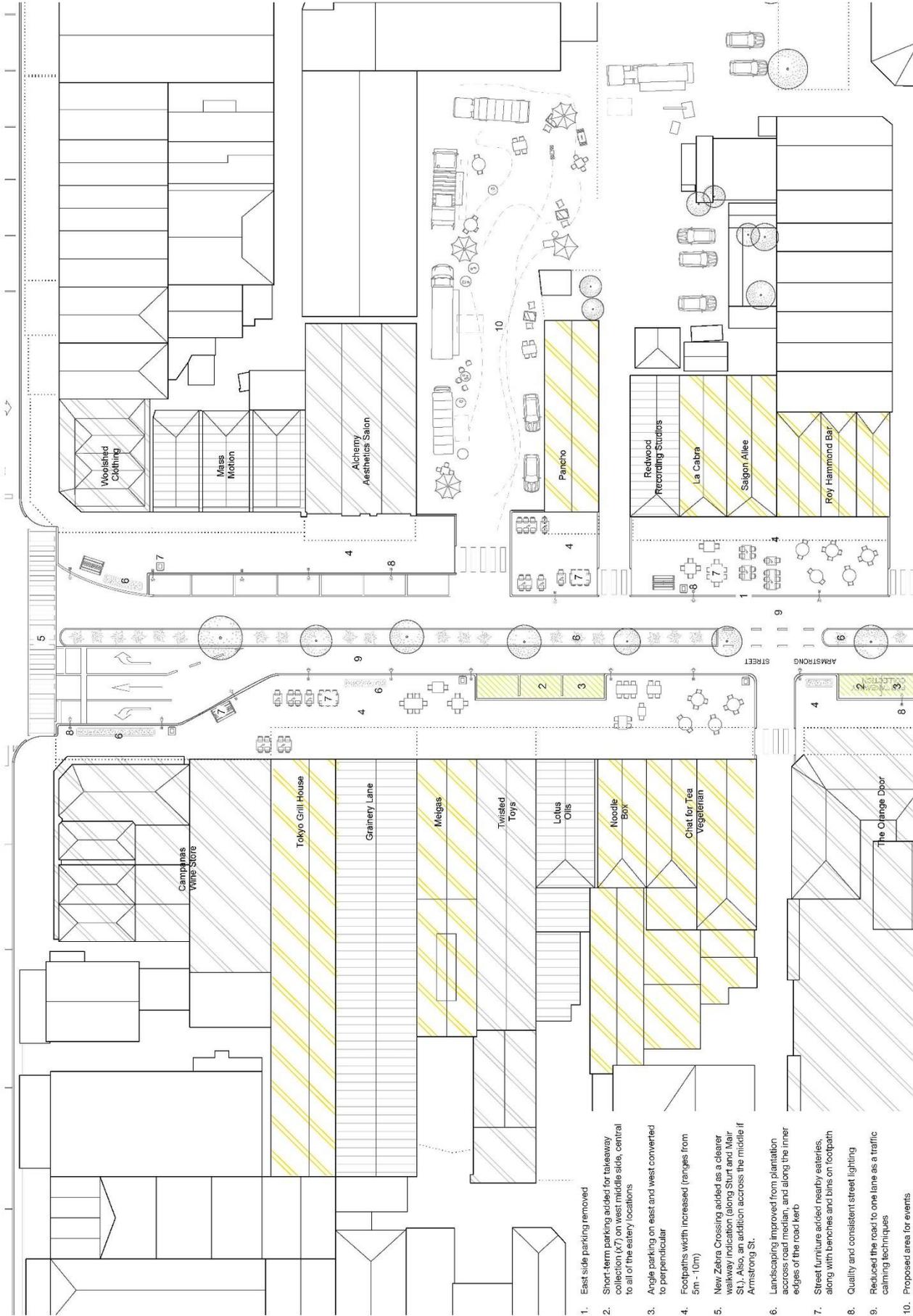


Scale 1:1000 @ A3

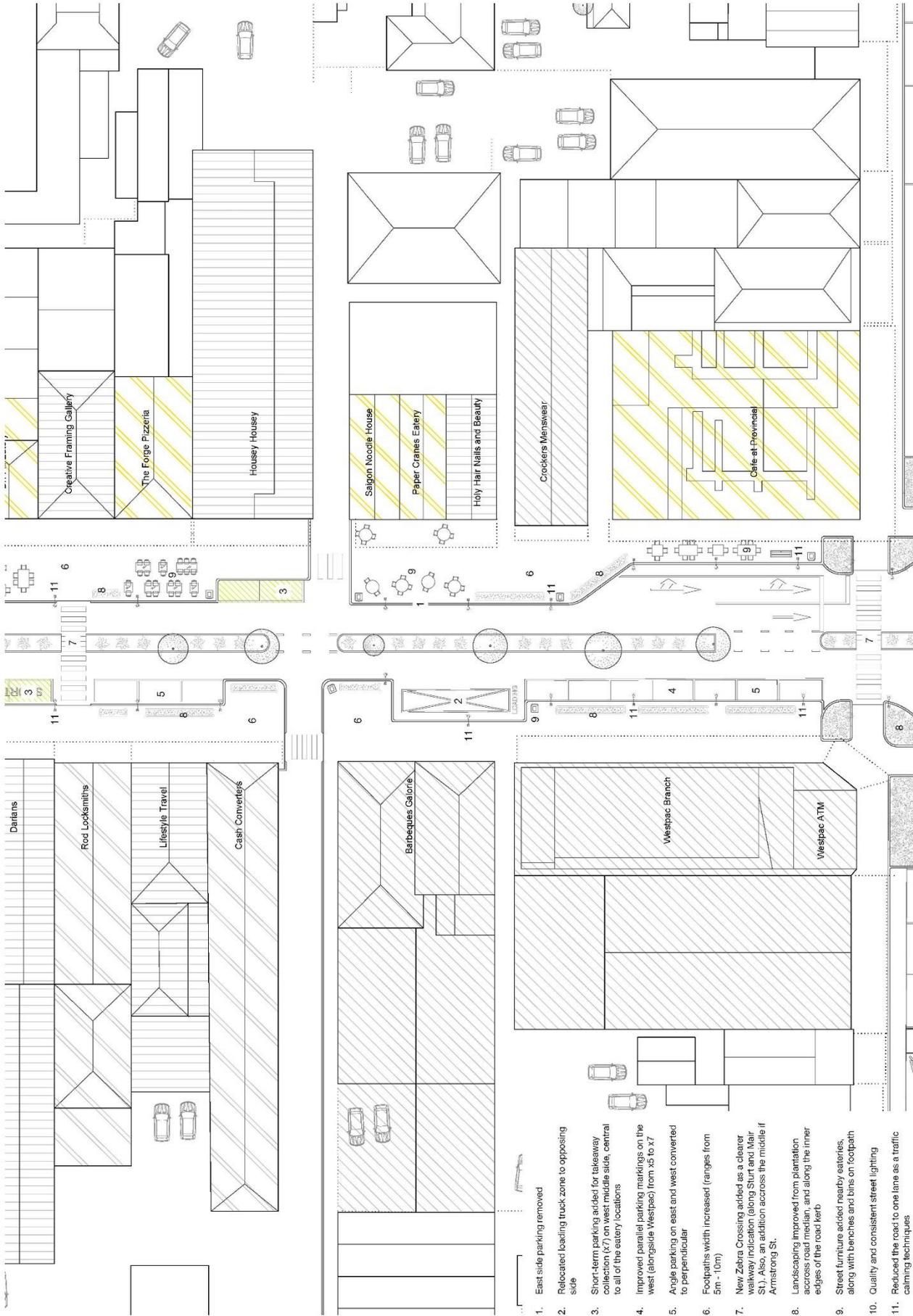
COMMON DRAM 053 14 047 JD 048 ADR  
 38 CORDEN ST, NORTH MELBOURNE, VIC, AUSTRALIA 3065 W COMMON-ADR.COM \* COMMON ADR  
 CONTACT@COMMON-ADR.COM T 03 9425 1007

Armstrong St. Ballarat Redevelopment | Proposed Site Plan

1. East side parking removed
2. Relocated loading truck zone to opposing side
3. Short-term parking added for takeaway collection (K7) on west middle side, central to all of the eatery locations
4. Improved parallel parking markings on the west (alongside Westpac) from x5 to x7
5. Angle parking on east and west converted to perpendicular
6. Footpaths width increased (ranges from 5m - 10m)
7. New Zebra Crossing added as a clearer walkway indication (along Sturt and Mar. St.). Also, an addition across the middle of Armstrong St.
8. Landscaping improved from plantation across road median, and along the inner edges of the road kerb
9. Street furniture added nearby eateries, along with benches and bins on footpath
10. Quality and consistent street lighting
11. Reduced the road to one lane as a traffic calming techniques
12. Proposed area for events



1. East side parking removed
2. Short-term parking added for takeaway collection (27 on west middle side, central to all of the eatery locations)
3. Angle parking on east and west converted to perpendicular
4. Footpaths width increased (ranges from 5m - 10m)
5. New Zebra Crossing added as a clearer walkway indication (along Sturt and Mair St.). Also, an addition across the middle of Armstrong St.
6. Landscaping improved from plantation across road median, and along the inner edges of the road kerb
7. Street furniture added (nearby eateries, along with benches and bins on footpath)
8. Quality and consistent street lighting
9. Reduced the road to one lane as a traffic calming techniques
10. Proposed area for events



1. East side parking removed
2. Relocated loading truck zone to opposing side
3. Short-term parking added for takeaway collection (x7) on west middle side, central to all of the eatery locations
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