



**Tourism  
Midwest**  
Victoria

2024 – 2033

# Golden Plains Local Area Action Plan (Golden Plains – North SA2)

# 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

# Overview



Golden Plains – North SA2 is situated approximately 1 hour 45 mins west of Melbourne. The area has strong historical significance and rural charm, offering a glimpse into the history of the Australian gold rush and the enduring spirit of its local community. It is an area where the past and the present coexist, making it a destination for history enthusiasts and those looking for a peaceful, rural retreat in Victoria.

As a newly formed Visitor Economy Partnership (VEP), Tourism Midwest Victoria in collaboration with Golden Plains Shire Council (GPSC) has developed this Local Area Action Plan (LAAP). The scope of this LAAP includes the Golden Plains – North SA2 only, which is part of the larger Golden Plains Shire. Its main towns and villages are Smythesdale, Rokewood, Linton, and Haddon.

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 Golden Plains – North-specific recommendations to help guide the area’s visitor economy over the next ten years and reflects the needs of the First Peoples’, community, industry, and Council.

## Our current visitor snapshot

In 2023, Golden Plains – North SA2 attracted an estimated 21,000 visitors who collectively injected \$1.7 million into the Shire’s economy each year.

It is important to note that because this LAAP includes the SA2 of Golden Plains – North only, visitation data also only reflects this area. Golden Plains Shire, however, receives a much larger number of visitors (over 200,000) who spent an estimated \$35 million in the local economy.

Figure 1: Visitor profile snapshot, 2023<sup>1</sup>



### 21,000

#### Trips in 2023

- 61% domestic day trip
- 38% domestic overnight
- 1% international overnight<sup>2</sup>



### \$1.7 m

#### Spend in 2023

- 20.5% domestic day trip
- 78% domestic overnight
- 1% international overnight<sup>3</sup>



### 2.0 nights

#### Average Length of Stay

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

<sup>2</sup> Visitor split is based on a 10-year average due to minimise sample size challenges.

<sup>3</sup> Ibid



## Our visitor economy in 2033

The SA2'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: Golden Plains – North forecasts<sup>4</sup>



### Total spending in Golden Plains – North is forecast to reach \$2.6 million by 2033

Visitor spending in the Golden Plains – North will primarily originate from a domestic day market, accounting for 63% of spending in 2033. The remainder will come from domestic overnight visitors (27%) and international visitors (10%).



### Total visitors to Golden Plains – North are projected to reach 27,000 by 2033, up from 21,000 in 2023<sup>5</sup>

Growth to Golden Plains – North 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 24,000 domestic day trip visitors and 2,400 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>4</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>5</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 categories and the Tourism Midwest SDMP Product Pillars.

Table 2: Strategic framework guiding the Sustainable Destination Management Plan



# Our plan on a page

This Golden Plains – North LAAP aligns closely with the Tourism Midwest Victoria’s SDMP’s strategic framework (see Figure 2). The targets identified are for Golden Plains – North.

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: The priority strategic initiatives

	Advocacy	Ballarat-Skipton Rail Trail experience enhancements	Repair the Rainbow Bird & Kruc-a-ruc Trails	Profile and support festivals and events in Golden Plains North
<b>Type</b>	Supply-side product	Supply-side product	Supply-side product	Supply-side product
<b>Rationale</b>	The Devils Kitchen and The Jubilee Minesite are both spectacular outdoor sites, however, advocacy is needed for improved funding for upgrades and maintenance of each site.	<p>The Ballarat to Skipton Rail Trail is a picturesque cycling and walking path that follows the route of a former Ballarat to Skipton railway line, spanning approximately 53 kilometres.</p> <p>To further enhance the experience, the opportunity exists to investigate the following.</p> <ul style="list-style-type: none"> <li>▪ Guided experiences including a potential First Peoples' land experience on the trail that could be marketed to school groups.</li> <li>▪ Other guided experiences with commercial operators.</li> <li>▪ Stronger profiling and promotion of the trail as an overnight activity.</li> <li>▪ Investigate the introduction of paid tent camps along the trail to complement guided experiences.</li> </ul>	Both the Rainbow Bird and Kruc-a-ruc Trails are popular trails in Golden Plains – North. There is a need however to undertake upgrades to ensure the longevity and sustainability of the trails. This includes the Jubilee Mine section of the track which is often damaged by 4WDs. There is also a general need to make the trail accessible.	Work with event organisers to foster the creation of new and distinctive destination events in Golden Plains North. This may involve facilitating partnerships, providing resources, and offering guidance to ensure the success and sustainability of these new events.
<b>Actions</b>	<ol style="list-style-type: none"> <li>1. Advocacy of maintenance and funding for Devil's Kitchen Geological Reserve.</li> <li>2. Advocacy of maintenance and funding for Jubilee Mine site.</li> </ol>	<ol style="list-style-type: none"> <li>1. Identify enhancements to introduce.</li> <li>2. Undertake discussions with private tour operators to gauge interest in operating on the trail to offer packages etc.</li> <li>3. Undertake discussions and support to generate more events centred around the trail.</li> <li>4. Develop a funding program to support the introduction of more activity and seek grant opportunities.</li> </ol>	<ol style="list-style-type: none"> <li>1. Investigate repairs needed for the Trails and prioritise.</li> <li>2. Develop in stages if needed.</li> <li>3. Submit to the Works Department for funding.</li> </ol>	<ol style="list-style-type: none"> <li>1. Work with partners to establish festivals.</li> <li>2. Develop collateral for promoting festivals.</li> <li>3. Work with the tourism sector and other stakeholders to ensure festivals are well-promoted and supported.</li> </ol>

	Short Stay accommodation	Artisan food and drink experiences	Linton, Scarsdale and Smythesdale streetscape improvements	Directional and interpretive signage audit
<b>Type</b>	Supply-side product	Supply-side product	Supply-side product	Supply-side product
<b>Rationale</b>	<p>There is a need to consider the introduction of new accommodation options in Golden Plains – North to minimise economic leakage and encourage a longer visitor dwell time. Currently, the area only offers basic accommodation including a few campgrounds and some boutique accommodation. Golden Plains North should look to develop a short stay accommodation strategy, and, once developed look to advocate as per the recommendations of the strategy.</p>	<p>The availability of food and drink and the diversity of the food and drink offering is a gap for not only Golden Plains North but throughout the broader Midwest Victoria region.</p> <p>There is a need for a plan for Golden Plains North to engage with its current hospitality sector and also to encourage new operators to grow its artisanal food and drink experiences in a sustainable manner.</p>	<p>Linton, Scarsdale and Smythesdale have quaint and attractive qualities including several attractive heritage buildings. Consideration to developing a main street improvement program for each town should be given. This could investigate initiatives such as more landscaping, adding pedestrian-friendly features like walkways and benches, installing decorative lighting, improving signage, upgrading wayfinding, and revitalising historic buildings or landmarks.</p>	<p>There is a need to undertake an audit and upgrade of Golden Plains – North’s directional and interpretive signage. Ensuring Golden Plains – North has good directional and interpretive signage will enhance the visitor experience and promote exploration.</p> <p>The audit should include:</p> <ul style="list-style-type: none"> <li>▪ a current stocktake of signage;</li> <li>▪ identify where repairs and better securing of signage are needed;</li> <li>▪ identify new sites of significance which could benefit from interpretive signage to enhance the visitor experience;</li> <li>▪ ensure that signage is consistent across the area</li> </ul>
<b>Actions</b>	<ol style="list-style-type: none"> <li>1. Develop a short-term Stay Accommodation Strategy. (Internal)</li> <li>2. Advocate for Short Stay Accommodation as per recommendations of Short Stay Accommodation Strategy.</li> <li>3. Initiate discussions with Tiny Homes Providers.</li> </ol>	<ol style="list-style-type: none"> <li>1. Engage with business and community on suitable food and drink experiences.</li> <li>2. Develop a plan to encourage Artisan food and drink experiences.</li> </ol>	<ol style="list-style-type: none"> <li>1. Investigate options for main street improvements.</li> <li>2. Develop a main street improvement program.</li> <li>3. Liaise with the community and businesses.</li> <li>4. Identify additional grant funding streams to activate and support the plans.</li> <li>5. 5. Develop a prioritisation program and gain the support of local business owners and operators.</li> </ol>	<ol style="list-style-type: none"> <li>1. Identify grant funding streams that could support the development of the audit.</li> <li>2. Undertake a tourism-focused directional and interpretive signage audit.</li> <li>3. Identify options for better securing of signs to ensure longevity.</li> <li>4. Introduce the new signage system.</li> </ol>



# Part 2: Introduction



## Overview

Tourism Midwest (TMV), in collaboration with the Golden Plains Shire Council (GPSC or Council), has developed this ten-year Local Area Action Plan (LAAP) for the Golden Plains - North SA2. 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

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

## Phrases and concepts to know

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

Table 5: Terms to know

Term	Description	Relevance to the LAAP
<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 sustained tourism development and growth.
<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.	This LAAP sees stakeholders involved in tourism in Midwest Victoria 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 LAAP's recommendations include strategies and measures aimed at reducing the environmental impact of tourism activities and making the sector more resilient to the challenges posed by climate change. This was highlighted as a key desired outcome by several stakeholders.
<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 area, 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

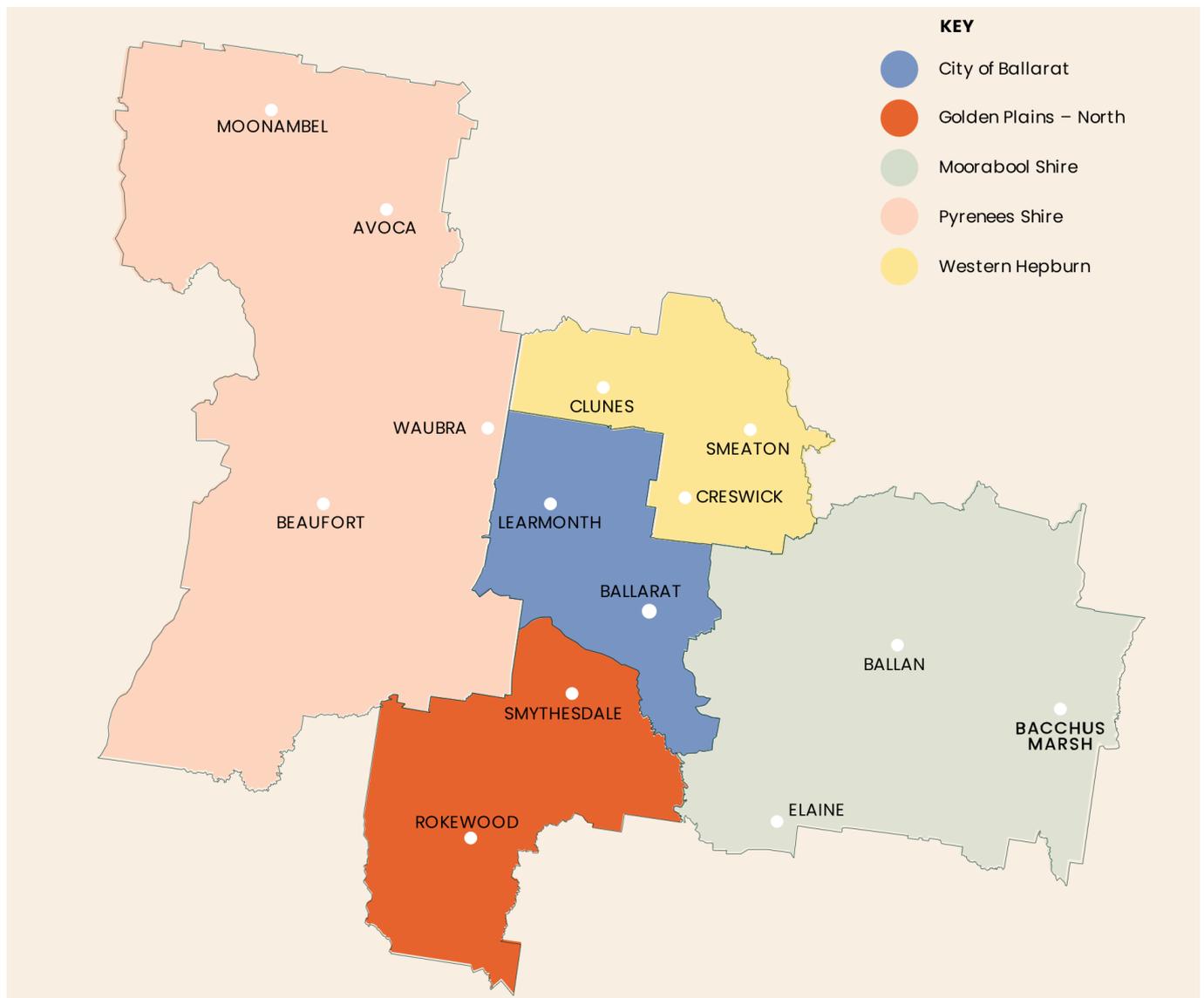
## Geography

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 (LGAs) 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>6</sup>

Figure 4: SDMP scope

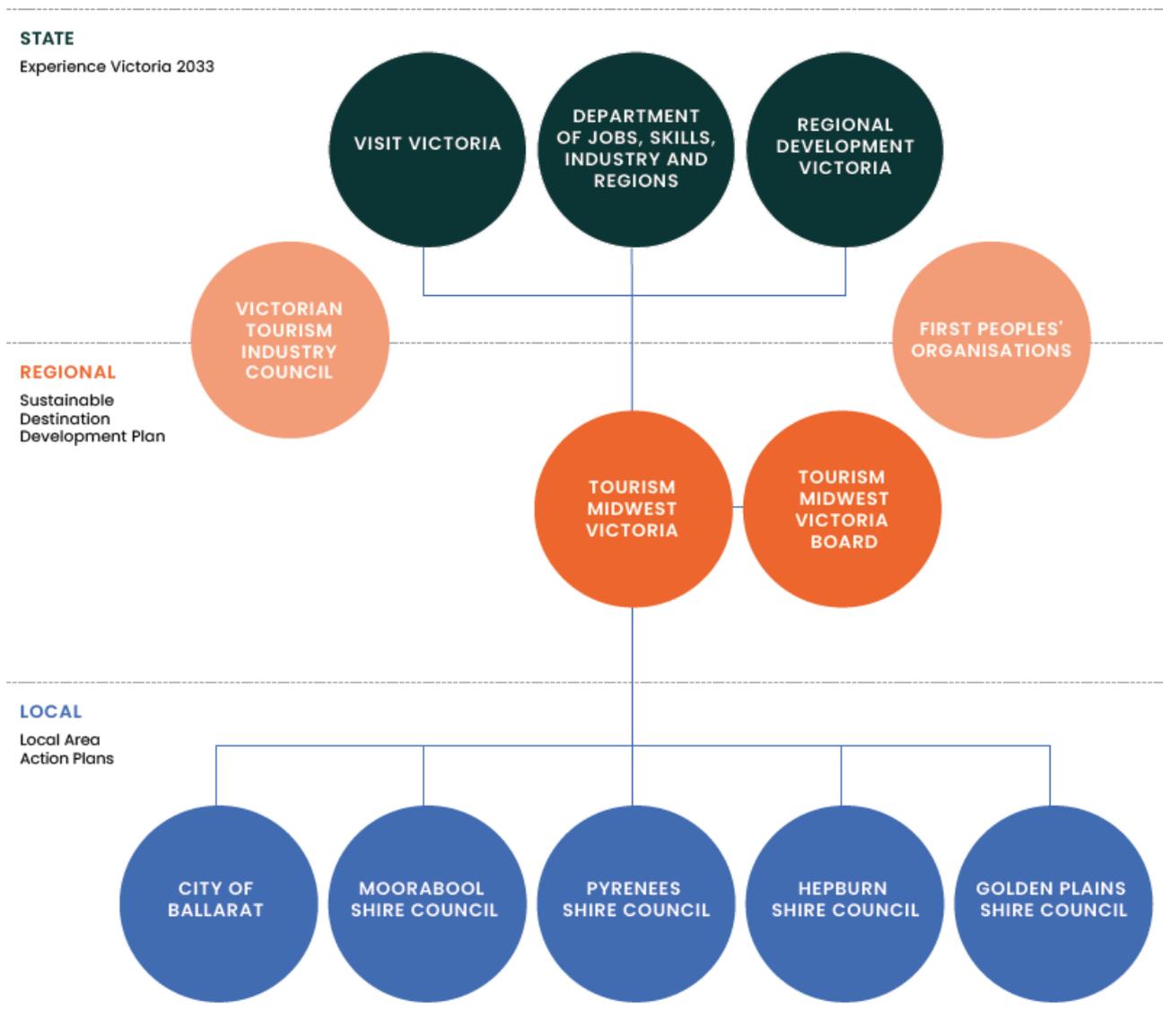


<sup>6</sup> The City of Ballarat’s population is projected to grow by 27,000 residents (+23%) and Moorabool Shire’s population is forecast to increase by 18,000 residents

(+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

Outlined in Table 6 are the roles and responsibilities of these stakeholders in a tourism and destination management context.

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 and product development.
- Provide regional context and insights to inform government policy development, decision making and investment priorities.
- Ensure continued crisis preparedness and support relative to the visitor economy.

### Core benefits

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

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

### Key features

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

- Ensure clear roles and responsibilities including developing a sustainable destination management plan for the region. The SDMP should be reviewed and updated in three years.
- Establish solid governance with a broad skill-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 documents (see 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 to 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.	Creative State 2025 builds on Victoria's strengths, and tackles pressing and systemic challenges facing creative future collaboration and investment.  With Creative Energy and People and Place product pillars of this SDMP, there is alignment through striving to improve equitable access to creative experiences and careers; and investment in new and established innovative creative products and experiences.
Central Highlands Regional Economic Development Strategy (REDS)	Developed by Regional Development Victoria, the REDS identify the strategic directions to further drive growth and prosperity in regional Victoria.	The REDS identifies five strategic directions based on the opportunities emerging from the region's endowments, industry specialisation and socioeconomic context.  Of these five, the most pertinent is Strategic Direction – "continue to grow and develop the visitor and creative economies".  Critical visitor and creative precincts identified in the REDS and that strongly align with this 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 Nations 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 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 enduring partnerships.</li> <li>• Provide sector leadership to support inclusive growth.</li> </ul>

Image credit: Smythesdale Country Market



## About Golden Plains – North SA2

Golden Plains – North SA2 is a destination that offers an enriching visitor experience. The area is known for its rural/agricultural character as well as its gold rush heritage. Agriculture plays a key role in the local economy, with farming and livestock activities being a cornerstone reflecting the rural lifestyle in the area.

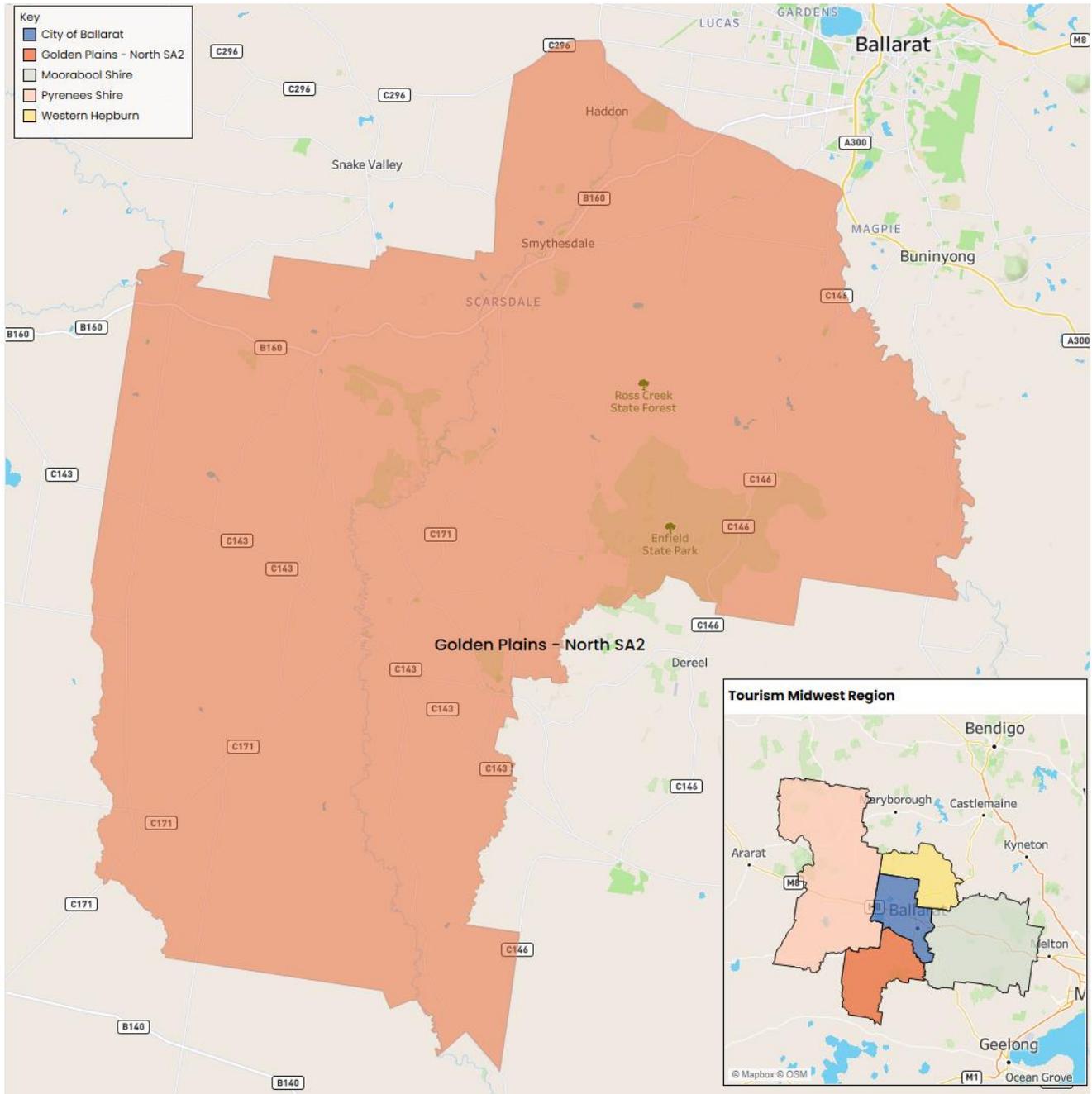
Smythesdale, along with the neighbouring towns and villages, played a significant role in the gold rush of the 19th century. Gold was discovered in the region in the 1850s, leading to a surge of prospectors and miners seeking their fortunes. The

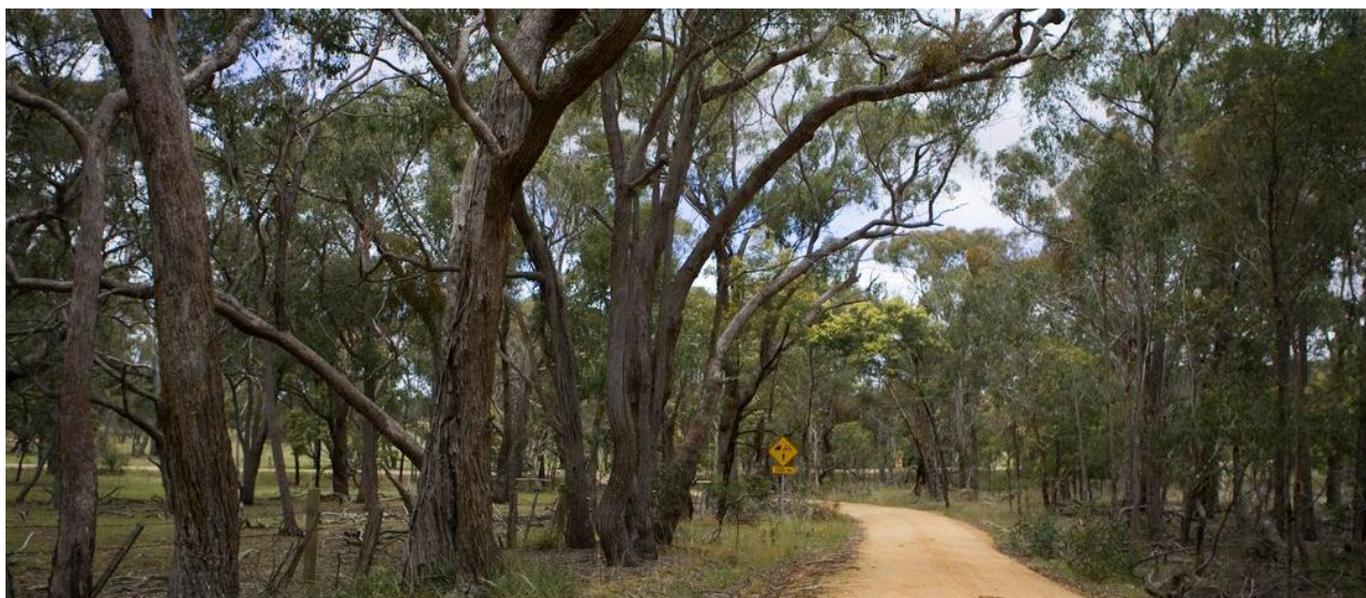
town of Smythesdale was established during this period and saw a bustling mining community.

Golden Plains – North still retains some historical landmarks and buildings from the Gold Rush era, which serve as a reminder of its mining heritage. These landmarks include old mine sites, mining relics, and some preserved historical buildings.

The scope of this exercise is outlined in Figure 6. It includes the area covered by Golden Plains – North SA2. This area was defined by Tourism Victoria when developing the Tourism Midwest Visitor Economy Partnership.

Figure 6: Golden Plains – North mapped scope area





## Our current product offering

### Attractions and experiences

The primary appeal of the Golden Plains – North SA2 currently relates to its cycling experiences and historic/heritage assets. Emerging strengths for the area include building on its gold heritage offer.

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

### Supply Assessment

The following audit is primarily based on an extensive ‘data scraping’ exercise that leveraged the following sources<sup>7</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 have, therefore, been excluded.

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

- Based on the audit findings, there are 6 tourist attractions and experiences in the SA2. Across the broader Golden Plains Shire, there are a greater number of attractions and

experiences but as the scope of this LAAP is limited only to the SA2, the audit has assessed those that fall in the SA2 boundary.

- Of these attractions, the most common type comprises Natural Areas and Trails (50%) supporting this as an existing product strength for the Shire, followed by Historic Sites and Museums (33%).
- The SA2’s product comprises all free products. While having ‘free things to do’ in a region is an important part of a region’s product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater.

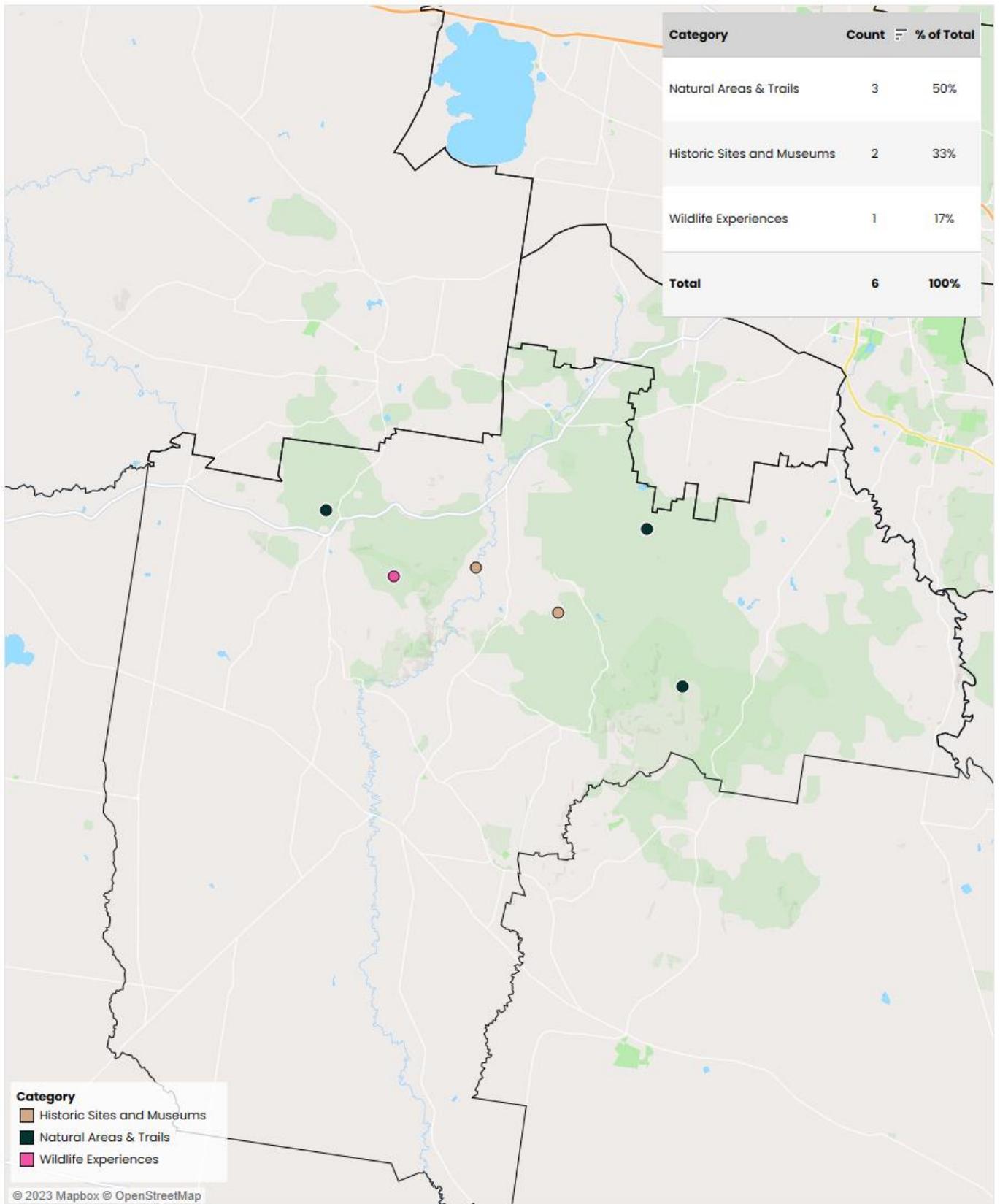
### Consumer Sentiment Assessment

A sentiment assessment was unable to be completed because of the small sample size of reviews and the number of attractions/experiences.

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<sup>7</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: Golden Plains – North SA2 attractions audit





## Accommodation

Accommodation supply in Golden Plains – North is limited, primarily comprising camping and boutique short-term holiday rentals. This has an impact on the ability to attract overnight visitors and results in economic leakage, as many visitors can only come as day travellers.

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

## Supply Assessment

An accommodation audit was completed for the Golden Plains – North SA2. The audit revealed the following (Figure 8).

- The SA2's accommodation mix is relatively small but is largely comprised of Campgrounds and Boutique Accommodation (both totalling 44% of the accommodation mix). Across the broader Golden Plains Shire, there are a greater number of accommodation properties but as the scope of this LAAP is limited only to the SA2 for the northern area of Golden Plains Shire, the audit has assessed only those that fall in the SA2 boundary.
- The Boutique Accommodation product excludes some Airbnb properties as there is no way to eliminate dual listings across websites, however, a separate audit of Airbnb indicates that there are 1,776 Airbnb properties throughout the Midwest region – 4% (68) of which are in the Golden Plains Shire (there was no way to separate only those in the Golden Plains – North SA2). These Airbnb properties have an annual occupancy rate of 54%.<sup>8</sup> While Airbnb accommodation is an important component of the region's accommodation mix, the dominance of this accommodation typology has created several challenges

where the mix of resident housing, Airbnb stock and commercial accommodation appears to be out of kilter.

- The SA2 has a limited amount of bookable unit stock. Usually, this stock is supplied by motels, hotels, and resorts but the SA2 does not appear to have any of these properties. Feedback indicated that as a result, the SA2 experiences leakage with visitors travelling for day trips and staying overnight in other areas that offer a greater mix of accommodation.
- There is a need to encourage the development of more accommodation in Golden Plains – North, including:
  - farmstays
  - smaller-scale boutique resorts
  - destination-style accommodation including glamping and eco-pods
  - introduction of caravan/holiday parks

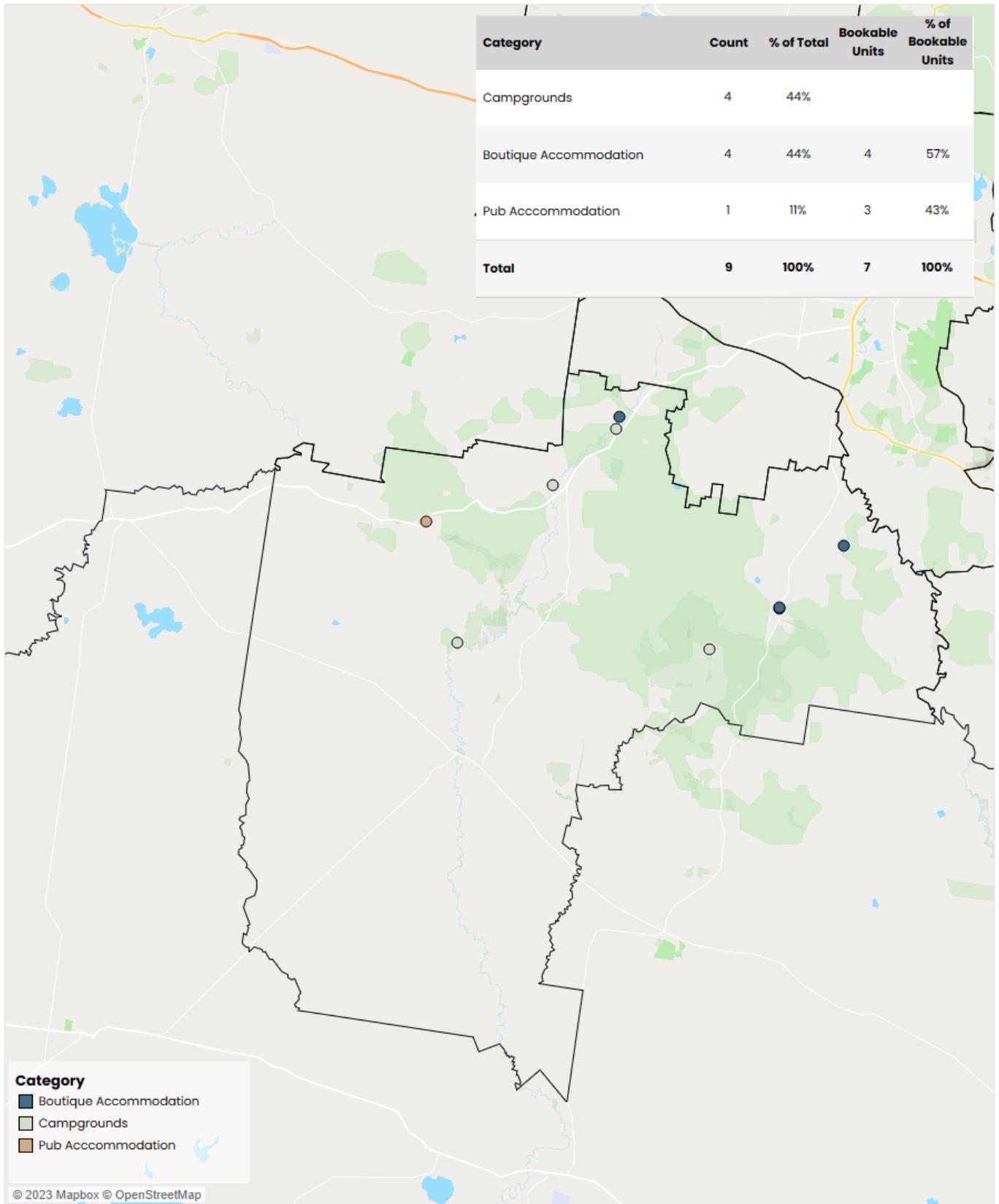
Finding suitable sites for commercial accommodation development on land zoned fit for purpose is an important step.

## Consumer Sentiment Assessment

A sentiment assessment was unable to be completed because of the small sample size of reviews and the number of attractions/experiences.

<sup>8</sup> AirDNA

Figure 8: Golden Plains – North SA2 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.

## Gap analysis

Based on the product audit, consultation findings and site visits, the following product gaps have been identified (Table 8). These have been linked to the Product Pillars identified in Figure 10 on page 35.

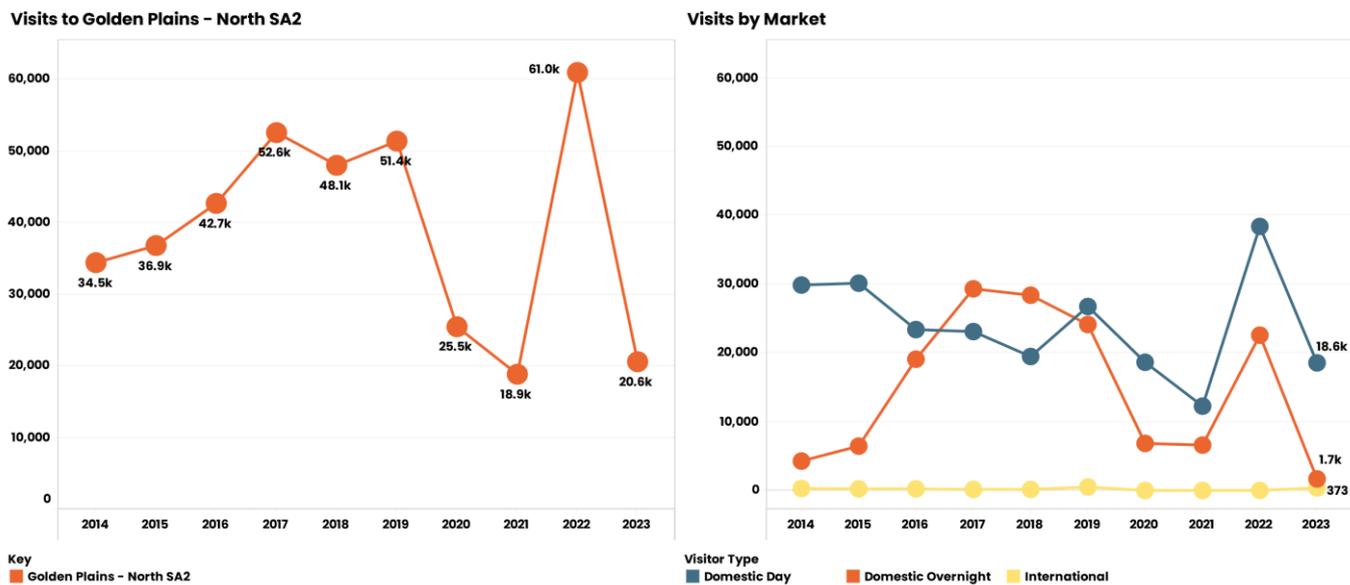
Importantly, by recognising these gaps, opportunities for product development have been identified.

Table 8: Golden Plains – North product gap analysis

Product pillar		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 Golden Plains - North.</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' first approach.</li> </ul>
People and Place	A sense of place	<ul style="list-style-type: none"> <li>Currently, significant historic buildings and streetscapes lack storytelling and activation.</li> </ul>	<ul style="list-style-type: none"> <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> </ul>	<ul style="list-style-type: none"> <li>Elevate arts and culture to drive visitation and dispersal.</li> <li>Development of an arts trail linking key product and towns.</li> </ul>
Nature at your fingertips	High usage trails and iconic views	<ul style="list-style-type: none"> <li>Golden Plains - North is not currently renowned for nature-based product.</li> </ul>	<ul style="list-style-type: none"> <li>Leverage proximity to Melbourne, promoting accessible nature 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> <li>Repair the Rainbow Bird Trail</li> </ul>
	Cycling hubs and mountain biking	<ul style="list-style-type: none"> <li>Lack of awareness of Golden Plains - North as a cycling destination</li> </ul>	<ul style="list-style-type: none"> <li>Enhance the Ballarat – Skipton rail trail</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 enhance visitation and length of stay throughout Golden Plains - North and broader region.</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 Golden Plains - North and broader region.</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. Largely B&amp;B and holiday home properties.</li> </ul>	<ul style="list-style-type: none"> <li>Attract public and private sector investment for new and enhanced boutique accommodation developments.</li> <li>Introduction of new caravan park accommodation.</li> </ul>
	Hospitality	<ul style="list-style-type: none"> <li>In some areas, basic food and beverage is unavailable or limited.</li> </ul>	<ul style="list-style-type: none"> <li>Ensure consistent hospitality availability is meeting visitor expectations.</li> </ul>
	Events	<ul style="list-style-type: none"> <li>There are limited destination-driving events that grow brand, yield and length of stay.</li> </ul>	<ul style="list-style-type: none"> <li>Golden Plains - North requires events/activations that take place over longer periods and activate after-hours to encourage staying longer in Golden Plains - North.</li> <li>Demarcation needs to be established between community and visitor-driving events through a strategic framework.</li> <li>Support the Linton Gold Festival</li> </ul>
	Marketing	<ul style="list-style-type: none"> <li>Brand positioning which profiles Golden Plains - North as a sub-region of Midwest Victoria and showcases its strengths as a heritage and recreation destination.</li> </ul>	<ul style="list-style-type: none"> <li>New brand positioning to be considered for Golden Plains - North which aligns with regional branding.</li> <li>A regional approach to be established to grow our reputation.</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 Golden Plains - North.</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 Shire.</li> </ul>	

# Our current visitor profile

Figure 9: Total visitation and visitation by visitor type, 2014–2023<sup>10</sup>



In 2023, the Golden Plains - North SA2 received 20,600 visitors. Before COVID-19, visitation to the SA2 was largely experiencing year-on-year growth, growing by 49% (17,000) visits between 2014 and 2019. This was driven by strong growth in the domestic overnight market, which increased by 25,000 visits over the same period.

The domestic day market has historically been the dominant market for the SA2, comprising 61% of visitors.

While the day trip market forms an important component of the visitor economy, it typically is relatively low-yielding. Domestic day trippers, on average, spent \$53 in the Golden Plains - North, compared with domestic overnight visitors who spent 6.2 times this amount at \$326 per trip. Higher spending by overnight visitors is generated generally because of additional spending on accommodation, food and beverage, transport, attractions etc.

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

<sup>10</sup> Based on 3-year averages. March YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

# Visitor forecasts

Golden Plains – North’s visitor economy is projected to experience notable growth, both domestically and internationally, with a robust growth outlook extending to 2033.

Domestic visitor demand is projected to be softer than previously expected due to household budget pressures and strong pent-up demand for outbound travel.<sup>11</sup>

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

Supporting data for these forecasts are included in 0.

Table 9: Golden Plains – North forecasts<sup>12</sup>

	<p><b>Total spending in Golden Plains – North is forecast to reach \$2.6 million by 2033</b></p> <p>Visitor spending in the Golden Plains – North will primarily originate from a domestic day market, accounting for 63% of spending in 2033. The remainder will come from domestic overnight visitors (27%) and international visitors (10%).</p>
	<p><b>Total visitors to Golden Plains – North are projected to reach 27,000 by 2033, up from 21,000 in 2023<sup>13</sup></b></p> <p>Growth to Golden Plains – North 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 24,000 domestic day trip visitors and 2,400 domestic overnight visitors expected in 2033.</p> <p>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.</p>

<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> 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>13</sup> Ibid



# Part 3: Who are our audience segments?

# Our community and the visiting friends and visiting relatives market

The Golden Plains – North 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>14</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.

The following research was undertaken in June 2022. While its sample was City of Ballarat residents, many of the findings are pertinent to the broader region (including Golden Plains – North).

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

VFR Host Market	VFR Market
 <ul style="list-style-type: none"> <li>▪ VFR hosts play a highly influential role in the destinations visited and the activities undertaken by VFR. Given the role of hosts, opportunities exist to market to local communities that influence visitor activities.</li> <li>▪ 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.</li> <li>▪ 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.</li> <li>▪ High volume hosts (those who hosted &gt;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).</li> <li>▪ VFR travel drives dispersion and spending – it encourages the VFR host market to try something new.</li> <li>▪ 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).</li> <li>▪ VFR hosts are often more adventurous in their city because of their visitors (e.g. being pushed to do something different).</li> </ul>	 <ul style="list-style-type: none"> <li>▪ Those visiting family:               <ul style="list-style-type: none"> <li>○ Tend to be older people.</li> <li>○ Tend to be friends and family groups travelling with children.</li> <li>○ Spend more nights staying in the homes of relatives or friends.</li> <li>○ Are more likely to go shopping and spend money on transport, souvenirs and gifts.</li> </ul> </li> <li>▪ Those visiting friends:               <ul style="list-style-type: none"> <li>○ Tend to be younger.</li> <li>○ Spend more nights in commercial accommodation.</li> <li>○ Tend to travel alone or in groups without children.</li> <li>○ Tend to spend more on food and drinks, and at pubs and nightclubs.</li> </ul> </li> <li>▪ 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.</li> <li>▪ VFR visitors tend to come without a plan (and this appears to be more common in the region than in other destinations).</li> <li>▪ Being a large centre, local knowledge is felt to be particularly valued in the region. It's not always obvious what to do in the region compared to other destinations.</li> </ul>

<sup>14</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 target audience segments are as follows: Active Regional Explorers; Regional Fledglings; Family Heartland; Mature Tastes<sup>15</sup>; Domestic Culturally and Linguistically Diverse (CALD) visitors; and International High-Value Travellers. Table 11 provides information on these markets.

The markets that have greater applicability to Golden Plains – North, include the following:

- Active Regional Explorers; and
- Family Heartland.

Table 11: Midwest Victoria’s target audience segments

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

<sup>15</sup> Target Audience Segmentation, December 2020, Quantum Market Research

**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 the region (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.

**Profile:**

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

**What the market wants:**

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



**Profile:**

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

**What the market wants:**

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



**Profile:**

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

**What the market wants:**

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



# Part 4: What will our future look like?

# Our vision, aspiration and values

The following aligns directly with the vision, aspirations and values developed for the Tourism Midwest Victoria Sustainable Destination Management Plan and is localised to Golden Plains – North 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 12: 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 Golden Plains – North and the 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 ensure we're on the right track of developing a "sustainable destination that enhances communities," a series of targets have been developed across the categories of economy, industry, community, culture and environment to measure our success.

Some of these targets can be more easily measured than others. Those targets that measure the value of the visitor economy using established metrics are indicated in Table 13. These targets are benchmarked and forecast based on third-party datasets such as Tourism Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS)

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

## Measuring the value of the visitor economy

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

	Measure	Target Type	Source/Benchmark	Current (2023)	Goal (2033)
Tier 1 Targets		Visitation	Visitor numbers to Golden Plains – North (day and overnight, domestic and international) as per the NVS & IVS.	21k	27k
		Visitor spend	Spend by visitors in the Golden Plains – North as per the NVS & IVS.	\$1.5m	\$2.6m
Tier 2 Targets		Ratio of overnight to day visitors	Number of overnight to day visitors as per the NVS & IVS data.	0.11	0.14
		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	\$70	\$96
		Employment	Tourism employment data from Remplan and Economy ID (sourced from Tourism Satellite account)	15	20

## What we strive for

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

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



# Our direction and focus areas

## What will we be known for?

Midwest Victoria and 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.

Figure 10 encapsulates the direction for the region that has emerged through the SDMP and LAAP planning processes.

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

The strength of Golden Plains – North lies in its historic link to gold mining, nature-based trails and tracks. Golden Plains – North’s tourism product aligns well with two of the State Government’s tourism product pillars of nature attractions and arts and culture.

Figure 10: Our direction and focus areas

- 1 Our positioning.**  
Delivering unexpected moments and uplifting experiences that beguile and entertain people.
- 2 Our product pillars.**  
The product pillars not only support our positioning, they reflect our region’s difference and help make us stand apart from other destinations. They are here to guide and inform product development, investment focus and marketing prioritisation.
- 3 Experience Victoria 2033 product priorities.**  
This section highlights the direct alignment between the Experience Victoria 2033 product priorities and the SDMP product pillars.
- 4 Our product development focus areas.**  
The product development focus areas build on the product pillars by highlighting the strength of the collective region.



### Enablers

#### PRODUCT DEPENDENCIES

- Accommodation
- Transport and connectivity
- Hospitality

#### SUPPORT ACTIVITIES

- Visitor servicing
- Marketing
- Industry training and development

#### GUIDING PRINCIPLES

- Inclusivity
- Accessibility
- Sustainability
- Community wellbeing

## 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 Golden Plains – North 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 Golden Plains Shire:

- Wadawurrung Traditional Owners Aboriginal Corporation
- Eastern Marr 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 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.

## 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.

Golden Plains – North 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 Golden Plains – North will capitalise on its highly accessible nature-based experiences including bushwalks, mountain and gravel bike trails, and horse riding.

Golden Plains – North 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.

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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.

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 15: Our way of working

Area	How we will deliver this
<p>Sustainability</p> 	<p>Promoting sustainable practices is an essential outcome of this LAAP. This includes identifying ways to minimise negative impacts on the environment, communities and cultures. For Golden Plains – North, this will include the following:</p> <ul style="list-style-type: none"> <li>▪ Encouraging operators to implement sustainable practices including energy-efficient technologies, waste reduction strategies and measuring carbon emissions.</li> <li>▪ Involving local communities in tourism planning and development to ensure that concerns and needs are understood.</li> <li>▪ Encouraging wildlife conservation efforts and responsible wildlife viewing.</li> <li>▪ 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.</li> <li>▪ Implementing strategies to manage and limit the number of visitors in sensitive or ecologically important areas (i.e. carrying capacities).</li> <li>▪ 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.</li> <li>▪ 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.</li> <li>▪ 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 offset carbon emissions through relevant programs.</li> <li>▪ 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.</li> <li>▪ 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.</li> <li>▪ Encouraging or providing ways for visitors to offset their carbon footprint through contributions to carbon offset programs.</li> <li>▪ 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.</li> </ul>
<p>Accessibility</p> 	<p>Encourage stakeholders (public and private) to offer experiences, facilities and services that are accessible and enjoyable for individuals of all abilities. This may include:</p> <ul style="list-style-type: none"> <li>▪ Investing in accessible infrastructure (e.g. the installation of ramps, elevators, accessible bathrooms and other features);</li> <li>▪ Introducing adaptive technologies (such as audio guides, sign language interpretation services and apps with navigation assistance);</li> <li>▪ Offering accessible information; and</li> <li>▪ Collaborating with advocacy groups.</li> </ul> <p>This will support the region in becoming a destination of choice for all visitors.</p>

## Area

## How we will deliver this

### Inclusivity



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

Ways in which the Golden Plains – North 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 Golden Plain's and Midwest Victoria's tourism workforce, so that industry can better understand and meet the needs of a wide range of visitors.

### First Peoples engagement and partnerships



The region's First Peoples' will guide us to develop and promote tourism experiences that deepen visitor awareness of their living culture and connection to Country. We will ensure this is undertaken at a pace that is acceptable by each First Peoples' group in 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 Golden Plains – North SA2 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 Golden Plains – North. To ensure the LAAP is implementable and realistic, the following are suggested as the priority local projects. These projects have been identified, workshoped, and discussed with community and council. Once these projects are underway, consideration can be given to rolling out additional projects identified.

### Project 1: Advocacy for maintenance projects

The Devils Kitchen Geological Reserve is an impressive geological reserve, home to a spectacular natural amphitheatre of Basalt columns, which has been formed by the course of the Woody Yaloak River cutting through the rock over time. The Reserve is managed by Parks Victoria and advocacy is needed for improved funding for upgrades and maintenance to the site.

Figure 11: Devils Kitchen Geological Reserve



There is also a need to advocate for funding to upgrade and maintain the Jubilee mine site. The site provides extensive ruins of the Jubilee Company Quartz Gold Mine.

Figure 12: Jubilee Mine Site



### Project 2: Ballarat-Skipton Rail Trail experience enhancements

The Ballarat to Skipton Rail Trail is a picturesque cycling and walking path that follows the route of a former Ballarat to Skipton railway line, spanning approximately 53 kilometres through the stunning countryside. The trail winds its way through rolling hills, past tranquil farmland, and alongside scenic waterways, offering visitors a leisurely journey immersed in the region's natural beauty. Along the way, users can explore charming rural towns, historic landmarks, and local attractions, making it a popular destination for outdoor enthusiasts and history buffs alike.

The experience currently offers an unsealed trail for walkers, cyclists and horse riders. Visitors are able to undertake it as an overnight experience, with overnight accommodation available in Smythesdale, Scarsdale, Linton and Skipton.

To further enhance the experience, the opportunity exists to investigate the following.

- Guided experiences including a potential First Peoples' land experience on the trail that could be marketed to school groups.
- Other guided experiences with commercial operators.
- Stronger profiling and promotion of the trail as an overnight activity.
- Investigate the introduction of paid tent camps along the trail to complement guided experiences.

Figure 13: Ballarat-Skipton Rail Trail



### **Project 3: Repair the Rainbow Bird & Kuruc-a-ruc Trails**

The Rainbow Bird Trail is a popular trail in Golden Plains – North. Zig-zagging from Scarsdale to Dereel, the Rainbow Bird Trail travels via Newtown, Cape Clear, the Jubilee Historic Area parkland, and Berringa, offering sights like churches, an old mine site, reservoirs, dams and lagoons, old bridges and an Avenue of Honour.

The 13.3-kilometre Kuruc-a-ruc Trail runs from Dereel to Rokewood and is suitable for walkers, horse riders and cyclists of all abilities.

There is a need however to undertake upgrades to ensure the longevity and sustainability of the trails. This includes the Jubilee Mine section of the track which is often damaged by 4WDs. As a result, this impacts the ability of other users to access and get past this section of the track.

There is a general need to make the trail accessible.

### **Project 4: Profile and support festivals and events in Golden Plains North**

Work with event organisers to foster the creation of new and distinctive destination events in Golden Plains North. This may involve facilitating partnerships, providing resources, and offering guidance to ensure the success and sustainability of these new events.

By leveraging local expertise, cultural heritage, and natural assets, Golden Plains North can co-create innovative events that showcase the area's unique identity, attract visitors, stimulate economic growth, and enhance community pride.

### **Project 5: Short stay accommodation**

There is a need to consider the introduction of new accommodation options in Golden Plains – North to minimise economic leakage and encourage a longer visitor dwell time. Currently, the area only offers basic accommodation including a few campgrounds and some boutique accommodation (see accommodation audit on page 21).

Golden Plains North should look to develop a short stay accommodation strategy, and, once developed look to advocate as per the recommendations of the strategy.

### **Project 6: Artisan food and drink experiences**

The availability of food and drink and the diversity of the food and drink offering is a gap for not only Golden Plains North but throughout the broader Midwest Victoria region.

There is a need for a plan for Golden Plains North to engage with its current hospitality sector and also to encourage new

operators to grow its artisanal food and drink experiences in a sustainable manner.

### **Project 7: Linton, Scarsdale and Smythesdale streetscape improvements**

Linton, Scarsdale and Smythesdale have quaint and attractive qualities including several attractive heritage buildings. The opportunity exists, however, to enhance the aesthetic appeal and functionality of each of the town's streetscape and public spaces to create a more inviting and enjoyable environment for locals and visitors.

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

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

### **Project 8: Directional and interpretative signage audit**

There is a need to undertake an audit and upgrade of the area's directional and interpretive signage. Ensuring the area has good directional and interpretive signage will enhance the visitor experience and promote exploration.

Clear directional signage helps travellers navigate unfamiliar areas, reducing frustration and increasing their confidence in exploring new destinations. Interpretive signage provides valuable information about local landmarks, historical sites, and natural attractions, enriching visitors' understanding and appreciation of the destination's culture and heritage.

Well-designed signage not only improves safety and accessibility but also fosters a deeper connection between visitors and the places they visit, ultimately contributing to a more memorable and fulfilling travel experience.

The audit should include:

- a current stocktake of signage;
- identify where repairs and better securing of signage are needed;
- identify new sites of significance which could benefit from interpretive signage to enhance the visitor experience;
- ensure that signage is consistent across the area;
- identify where potential signage could be located (both directional and interpretive) as part of Australia's Victorian Goldfields (World Heritage bid).

## Priority local project action plan

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

The timeframes included in the action plan reflect the following:

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

Table 16: Priority project action plan

Project	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Who	When
Advocacy	<ol style="list-style-type: none"> <li>1. Advocacy of maintenance and funding for Devil's Kitchen Geological Reserve.</li> <li>2. Advocacy of maintenance and funding for Jubilee Mine site.</li> </ol>	Nature at Your Fingertips	<p>Repairs are undertaken and usage of parks increased.</p> <p>Funding from Parks Victoria</p>	GPSC, Parks Victoria	Short Term
Ballarat-Skipton Rail Trail experience enhancements	<ol style="list-style-type: none"> <li>1. Identify enhancements to introduce.</li> <li>2. Undertake discussions with private tour operators to gauge interest in operating on the trail to offer packages etc.</li> <li>3. Undertake discussions and support to generate more events centred around the trail.</li> <li>4. Develop a funding program to support the introduction of more activity and seek grant opportunities.</li> </ol>	Nature At Your Fingertips, Product Dependencies	<p>Profile and usage of trail grows.</p> <p>Funding from grant programs</p>	GPSC	Medium Term
Repair the Rainbow Bird & Kruc-a-ruc Trails	<ol style="list-style-type: none"> <li>1. Investigate repairs needed for the Trails and prioritise.</li> <li>2. Develop in stages if needed.</li> <li>3. Submit to the Works Department for funding.</li> </ol>	Nature At Your Fingertips, Product Dependencies	Repairs are undertaken and usage of the trails increased.	GPSC	Long Term
Profile and support festivals and events in Golden Plains North	<ol style="list-style-type: none"> <li>1. Work with partners to establish festivals.</li> <li>2. Develop collateral for promoting festivals.</li> <li>3. Work with the tourism sector and other stakeholders to ensure festivals are well-promoted and supported.</li> </ol>	Creative Energy, People and Place	<p>Establishment and growth of festivals.</p> <p>Funding from grant programs</p>	GPSC, industry operators, event coordinators	Short Term

Project	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Who	When
Short Stay accommodation	<ol style="list-style-type: none"> <li>1. Develop a short term Stay Accommodation Strategy. (Internal)</li> <li>2. Advocate for Short Stay Accommodation as per recommendations of Short Stay Accommodation Strategy.</li> <li>3. Initiate discussions with Tiny Homes Providers.</li> </ol>	Product Dependencies	Additional short stay accommodation within the area.	GPSC	Short Term
Artisan food and drink experiences	<ol style="list-style-type: none"> <li>1. Engage with business and community on suitable food and drink experiences.</li> <li>2. Develop a plan to encourage Artisan food and drink experiences.</li> </ol>	Creative Energies, Product Dependencies	Greater variety of food and drink experience leading to greater visitation and regional profile.	GPSC	Short Term
Linton, Scarsdale and Smythesdale streetscape improvements	<ol style="list-style-type: none"> <li>1. Investigate options for main street improvements.</li> <li>2. Develop a main street improvement program.</li> <li>3. Liaise with the community and businesses.</li> <li>4. Identify additional grant funding streams to activate and support the plans.</li> <li>5. Develop a prioritisation program and gain the support of local business owners and operators.</li> </ol>	Product Dependencies	Main street improvement program is developed and implemented.	GPSC, corporate funding partners, business owners and operators	Short Term
Directional and interpretive signage audit	<ol style="list-style-type: none"> <li>1. Identify grant funding streams that could support the development of the audit.</li> <li>2. Undertake a tourism-focused directional and interpretive signage audit.</li> <li>3. Identify options for better securing of signs to ensure longevity.</li> <li>4. Introduce the new signage system.</li> </ol>	Product Dependencies	The directional and signage audit is completed. Navigating the area is easier for visitors and locals.	GPSC	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 17 and align directly with the SDMP.

The timeframes included in the action plan reflect the following:

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

TMV and the 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/ratepayer base of the various shires within the Midwest region. There may also be other models which already exist and which apply to other industry sectors of the regional economy.

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

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

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
1.1	Advocacy	<ol style="list-style-type: none"> <li>1. Develop a SDMP Advocacy Plan 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 TMV Crisis Management Plan</li> <li>2. Provide Industry Resilient Ready/Crisis Preparedness Program</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 BCC specifically.	TMV, All LGAs	Short term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
2.3	Commitment to sustainability	1. Demonstrate TMV's commitment to sustainability through the development of a Tourism Sustainability Plan (which incorporates sustainability benchmark research)	Guiding principles	Destination stakeholders lead the industry with positive impact policies, initiatives and actions.	\$40k	TMV, All LGAs	Medium – long term
2.7	Visitor servicing	1. Develop a Regional Visitor Servicing Strategy and Action Plan	Support activities	Visitor servicing is aligned across the region and to future trends.	\$50k	TMV, All LGAs	Short term
3.1	Arts, culture and heritage experience trail development	1. Audit and implement an arts, culture and heritage trail connecting various signature products throughout the region	Creative Energy, First Peoples Culture, People and Place	Signature arts, culture and heritage products throughout the region are better connected and promoted to drive visitor awareness, demand and dispersal.	\$85k	TMV, All LGAs	Medium – long term
3.2	Food and drink experience development	1. Audit and implement a food trail connecting signature food and drink experiences throughout the region 2. Develop 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 at your Fingertips 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 pillar and assist in delivering our targets.	\$75k	TMV, All LGAs, Parks Victoria	Short – medium term

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

# 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
4.9	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
4.10	Tracks and trails	<ol style="list-style-type: none"> <li>1. Develop a Regional Tracks and Trails Network Masterplan (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

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
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 drink 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> </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
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 – local insights

### 201 Responses

- A survey was distributed over 5 weeks to the community and industry throughout the Tourism Midwest region.
- Golden Plains did not receive enough responses (5 in total) to break down the survey responses into LAAP-specific responses. A consolidated response for the entire Tourism Midwest region has therefore been provided.
- The regional survey received **201** responses in total.
- Overall, the sample size for the total Tourism Midwest Region was robust, achieving a 95% confidence level and a 7% margin of error

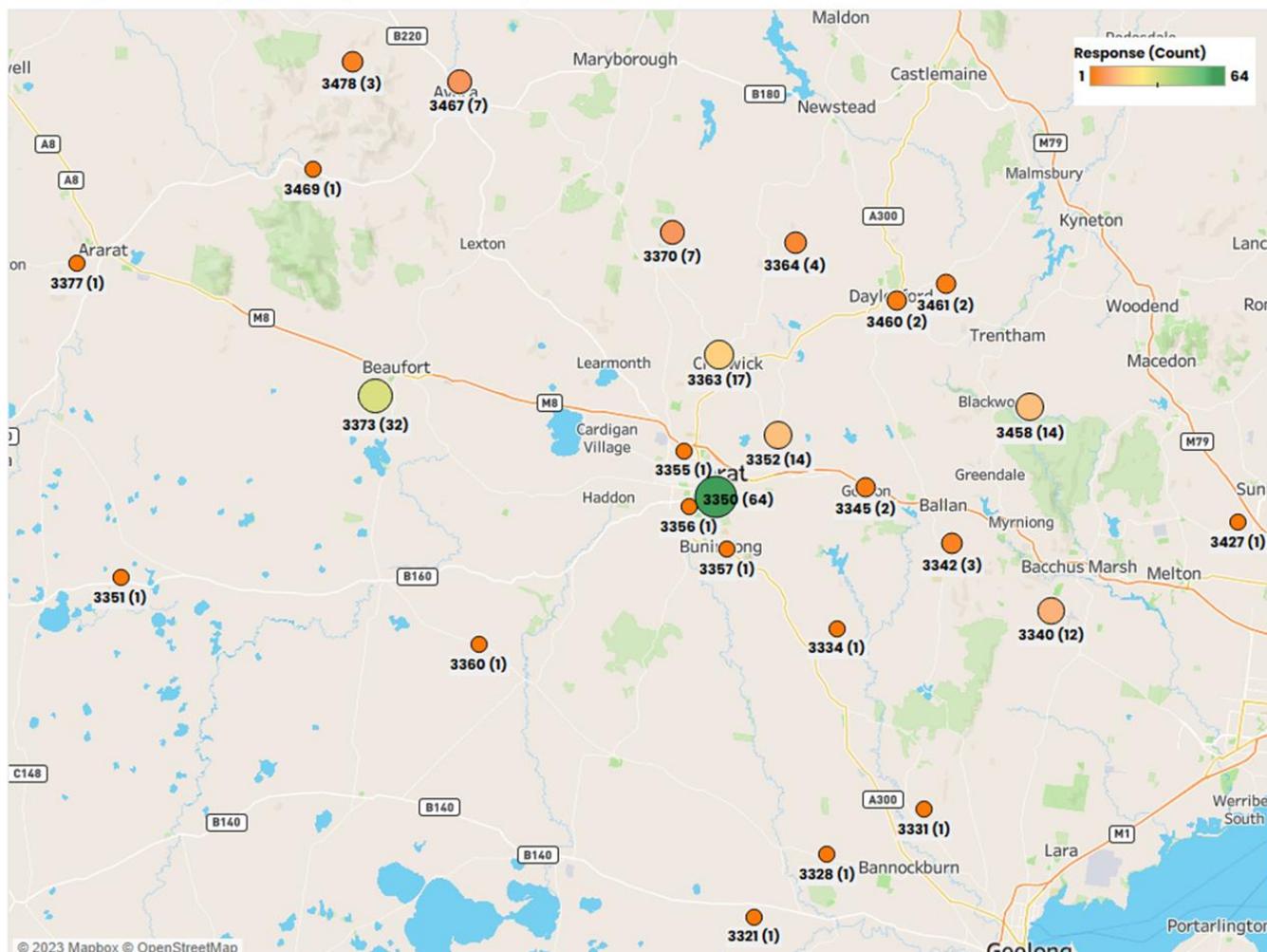
### Question 1

What Council area do you primarily associate with?

### Question 2

- A very good representative spread of postcodes was achieved across the region
- Understandably Ballarat (as the region city), got a greater share
- We will continue to engage with communities and industry throughout the process to encourage wide involvement
- Considering that several LGAs felt their industry and community were over-surveyed over recent times, the response rate and spread is impressive

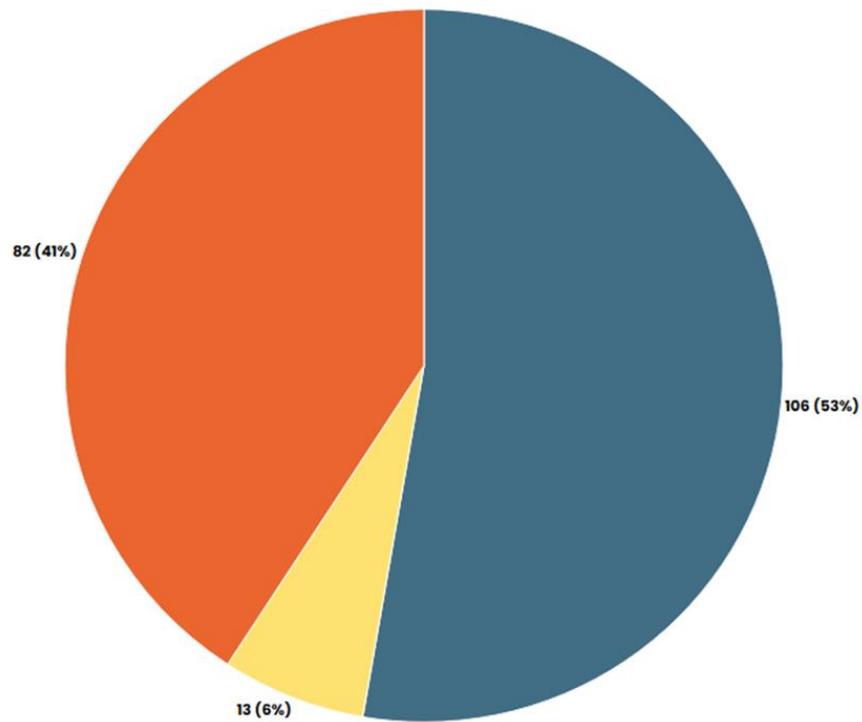
#### 2. What postcode do you primarily associate with? (All LGAs)



### Question 3

- A good split between business-industry respondents and separately interested community members
- Good to have also captured business reps who aren't residents but are investors-operators

#### 3. In what capacity are you completing this Survey? (All LGAs)



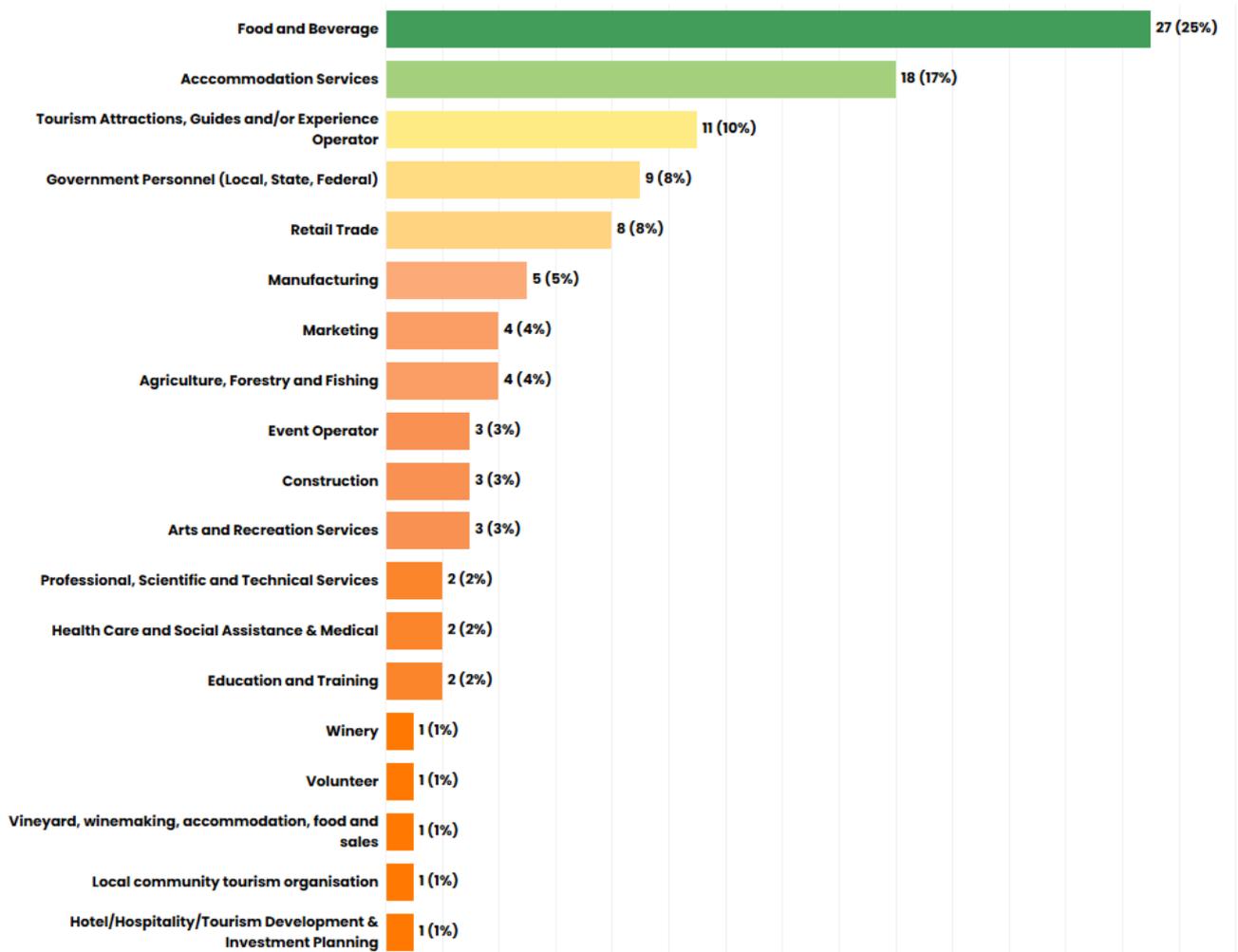
**Response**

- 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

- Importantly 55% of business respondents were primarily tourism sector operators
- Other sectors of the economy were also well-covered

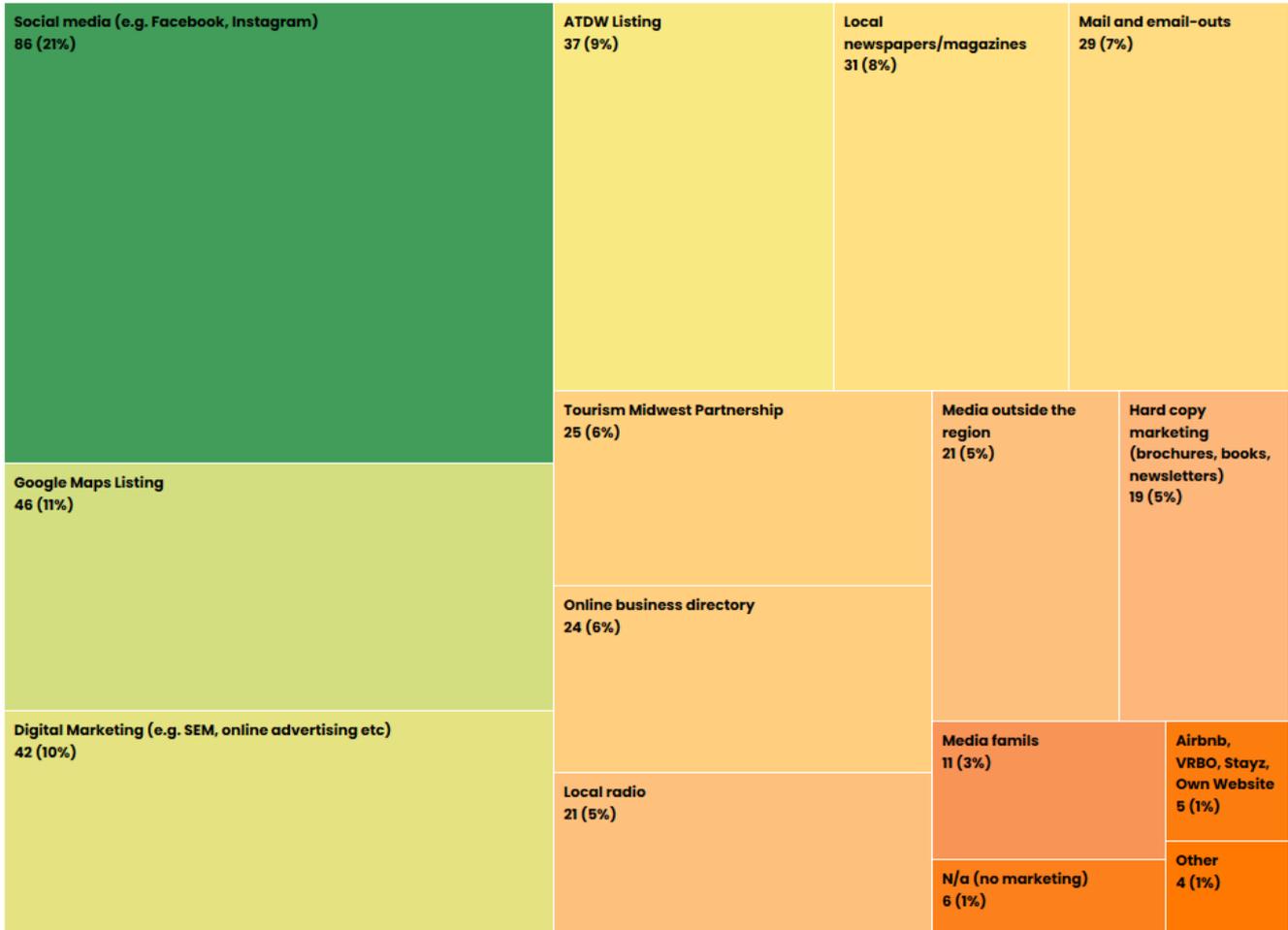
### 4. What best describes your business/organisation (All LGAs)



## Question 5

- Responses indicate the importance of social media in promoting businesses
- Just under 10% of businesses are listed on the Australian Tourism Data Warehouse. Good to get this increased
- 6% noted they also promote via the Tourism Midwest Partnership. Good to grow this

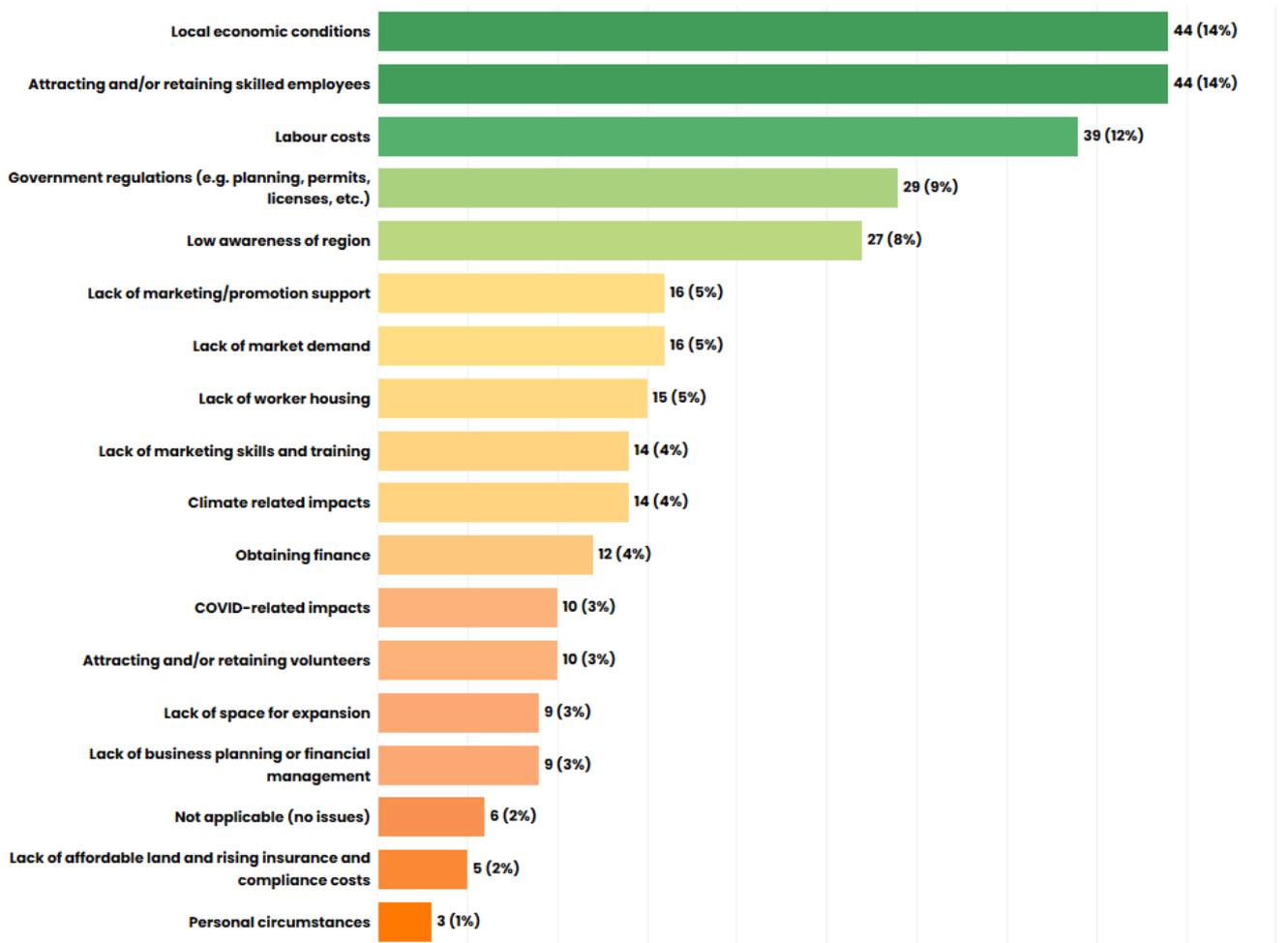
### 5. How is your business/organisation primarily promoted? Select all that apply. (All LGAs)



## Question 6

- Current economic conditions and staffing are the major issues noted
- Government regulations are noted as a major issue as well (especially planning)
- 8% also felt the region had low awareness and 5% said there was a lack of marketing
- The SDMP and LAAPs will pick up on these and other issues and identify solutions.

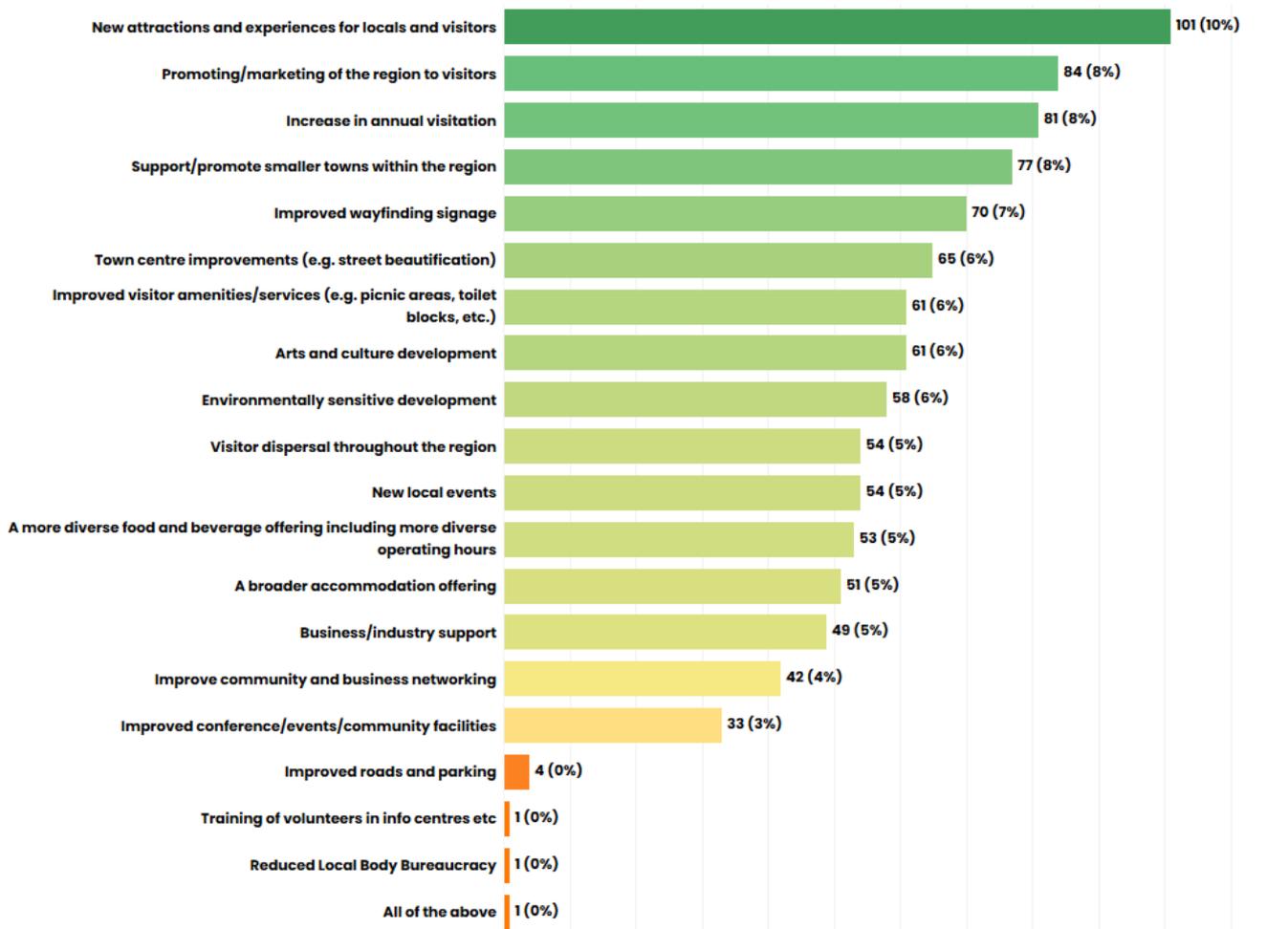
### 6. What issues is your business/organisation facing? Select all that apply. (All)



## Question 7

- Most want to see new attractions established
- And a need to upgrade many existing attractions
- The desire for stronger visitation and better dispersal of visitors around the region
- The desire for more events
- The desire for a night-time economy
- Need to diversify food and beverage offering

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



## Question 8

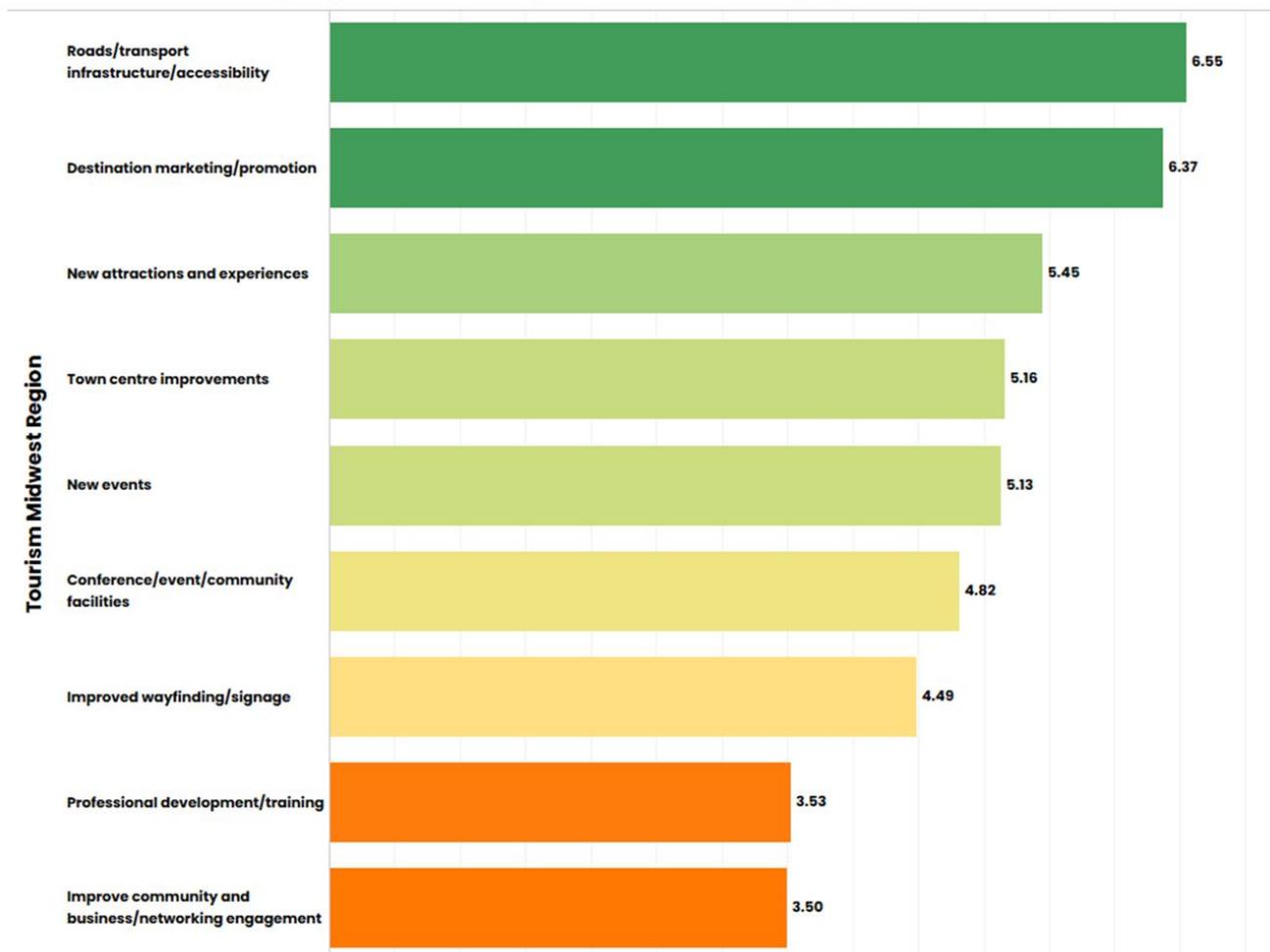
8. If there was one project that deserved priority over others to improve tourism to the region, please provide details below, including a preferred location (Ballarat)

- Ballarat to Skipton Rail Trail
- Clarkesdale Bird Sanctuary
- Devils Kitchen
- Historic goldmines
- Caravan park

## Question 9

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

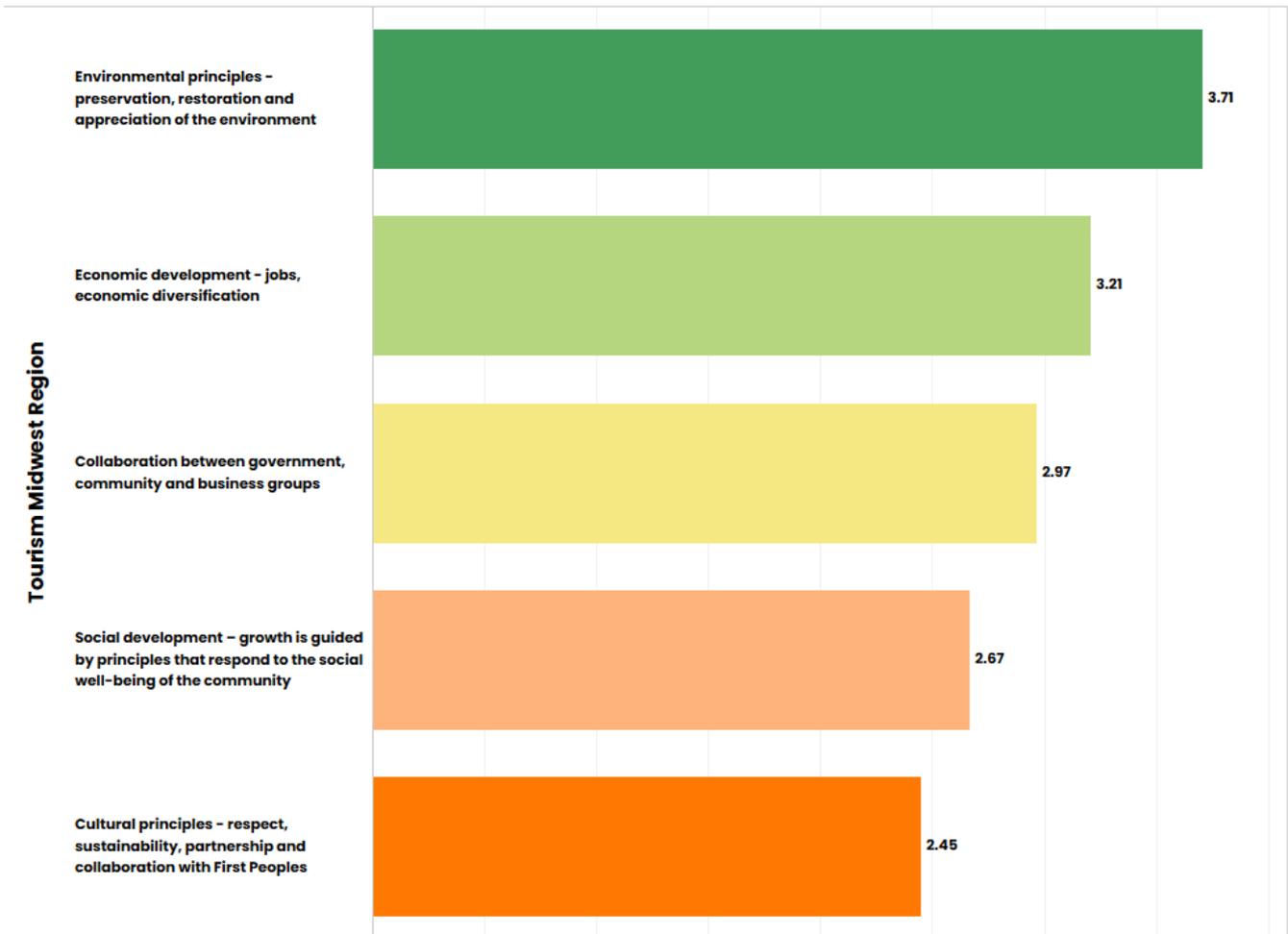
9. Please rank the items requiring attention in the region. (Tourism Midwest Region)



## Question 10

- Environmental considerations rated the highest
- Economic development and jobs were next
- Stronger collaboration between public, private and community stakeholders
- Social development important
- First Peoples partnerships and collaboration required

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



## Appendix 2 Glossary

BCC	Ballarat City Council
CALD	Culturally and Linguistically Diverse
CAPEX	Capital Expenditure
CBD	Central Business District
COVID-19	Coronavirus disease
DEECA	Department of Energy, Environment and Climate Action
DJSIR	Department of Jobs, Skills, Industry and Regions
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 14: Experience Victoria 2033 Product Priorities and Settings<sup>17</sup>

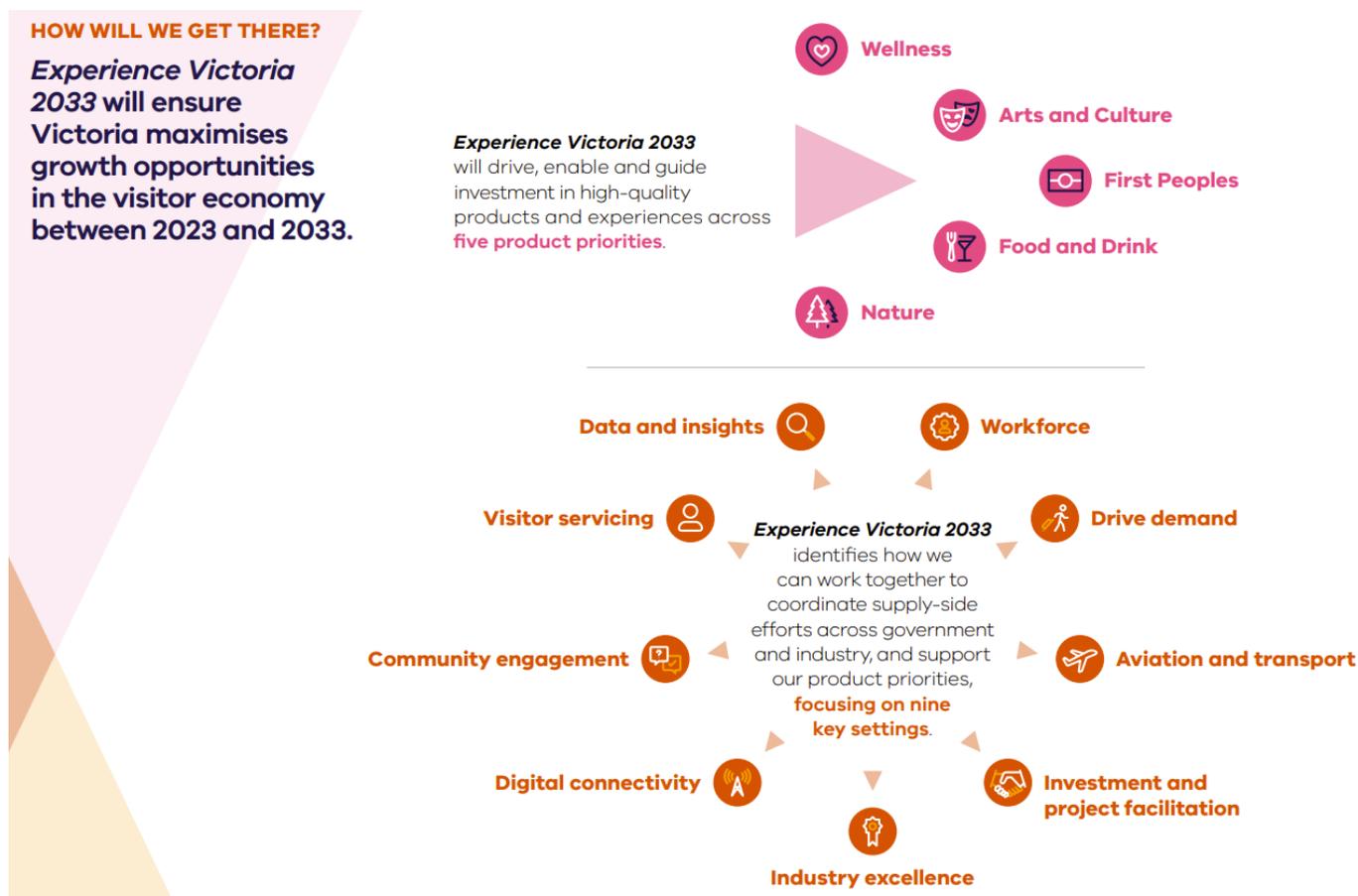


Table 18: Experience Victoria 2033 Product priorities and settings, and alignment with Midwest Victoria

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

<sup>17</sup> Experience Victoria 2033, page 9.

## Appendix 4 Visit Victoria Brand Playbook

Figure 15: Regional sub-brand framework – Goldfields<sup>18</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>18</sup> Destination Victoria Brand Strategy, page 24.

## Appendix 5 NPS calculation

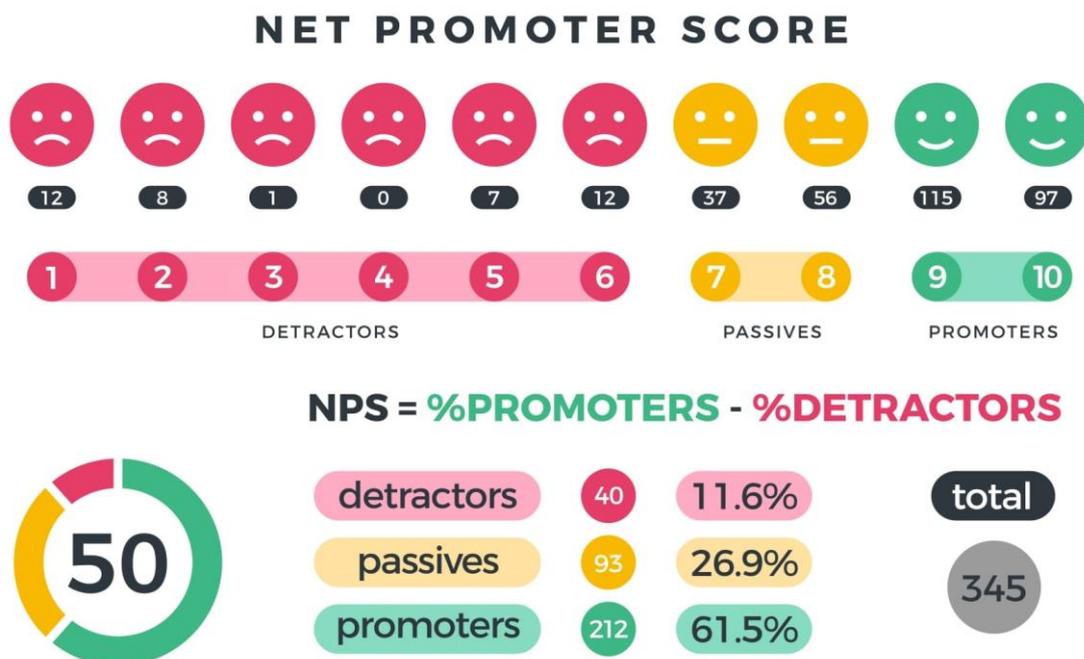
To undertake a top-line assessment of the quality of a region’s product offering, the Net Promoter Score (NPS) metric can be used. This is a measurement of consumer loyalty. In a tourism context, this translates to a visitor’s willingness to not only return for another stay but also make a recommendation 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 16):

- 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>19</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>20</sup> Only product with more than five reviews was included in the NPS assessment to ensure a robust sample size.

Figure 16: Net Promoter Score scale



<sup>19</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.

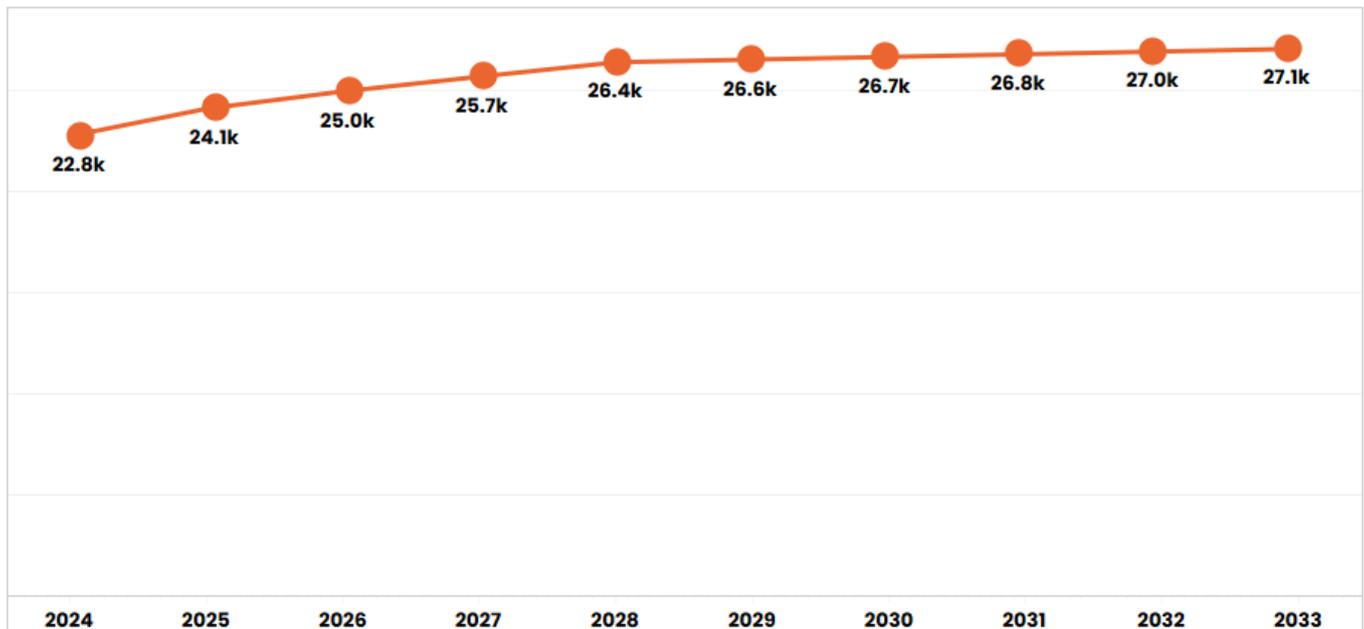
<sup>20</sup> <https://birdeye.com/blog/net-promoter-score-explained/>

## Appendix 6 Visitor forecasts

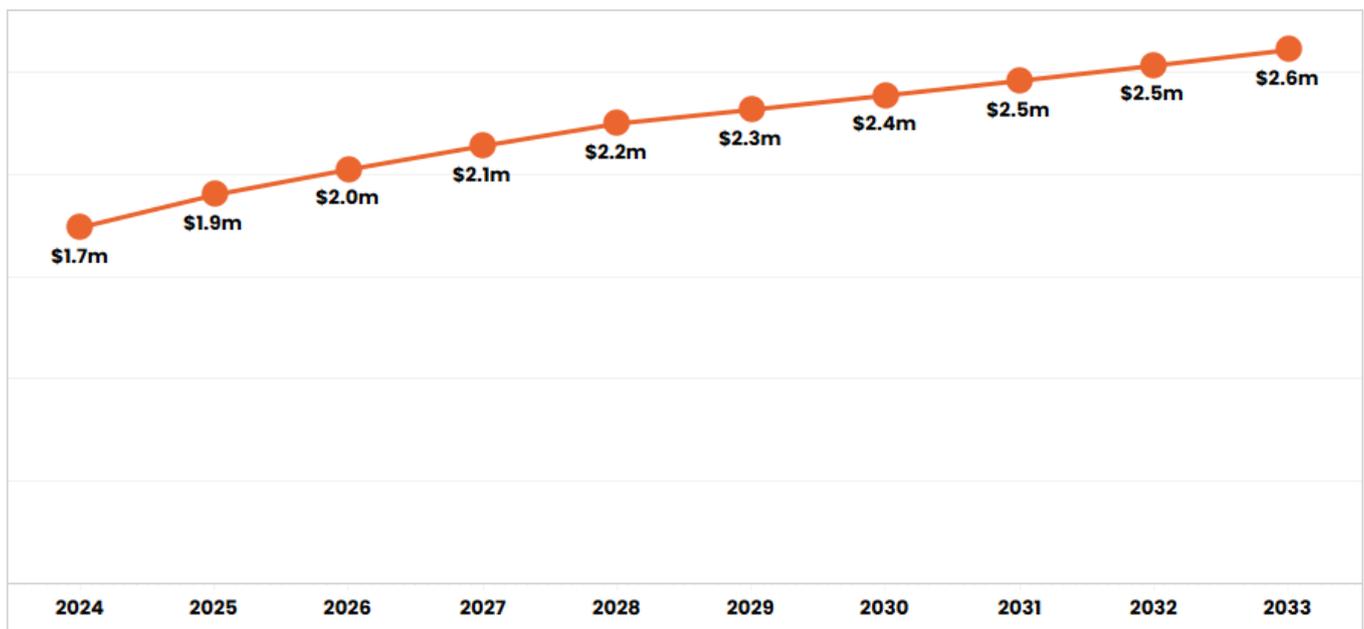
The following provides forecasts for visitor trips and spending to Golden Plains – North from 2024 to 2033. The forecasts have been aligned with the tourism forecasts for Victoria<sup>21</sup>.

Figure 17: Visitor forecasts, 2024–2033<sup>22</sup>

### Visitor forecasts



### Visitor spending forecasts



<sup>21</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>22</sup> Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts.

