




# Visitor Economy Strategy 2021–2024





Murrup Laar (Ancestral Stones) **Artist:** Deanne Gilson  [taracmoorephotography](https://www.instagram.com/taracmoorephotography)



# Acknowledgement of Country

The City of Ballarat acknowledges the Traditional Custodians of the land we live and work on, the Wadawurrung and Dja Dja Wurrung People, and recognises their continuing connection to the land and waterways. We pay our respects to their Elders past, present and emerging and extend this to all Aboriginal and Torres Strait Islander People.

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**This report was prepared by The City of Ballarat in relation to the development of *Ballarat Traveller Experience Plan 2021–2030*.**

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# **Foreword**

**The Visitor Economy industry has endured its most challenging time in history while demonstrating incredible resilience, adaptability, and innovation.**

This *Visitor Economy Strategy 2021–2024* commits to building Ballarat’s visitor economy by 2024 and increasing Ballarat’s market share of regional Victorian visitation.

The strategy outlines the agreed priorities for the City of Ballarat and industry to work together to re-ignite the visitor economy. The central priority is a focus on transforming experiences and events that are compelling and express the DNA of Ballarat to drive word of mouth, third party endorsement, and community advocacy.

There is a wonderful opportunity for Ballarat to grow its visiting friends and relatives market and for the community to play an integral role in hosting and welcoming visitors. Locals are the creators of the Ballarat experience enabling unique, authentic, and local experiences.

Supporting our key attractions like Sovereign Hill and the Ballarat Wildlife Park, which are reliant on international visitation, is critical to their long term viability and ensuring they are strong and viable attractors to build visitor itineraries to increase length of stay.

Infrastructure improvements are equally vital to success for shifting day trips to higher yield overnight stays. To impress potential visitors, we need to foster tourism business revival, to present our best face and to create a buzz of activity. Focus on developing the night-time economy will also be fundamental to attract new visitors to the region and re-build overnight mid-week visitation, to replace lost business, international and interstate visitors.

I sincerely thank you, the industry and community, for your generous contribution, guidance, and support in co-curating the recovery priorities for the Ballarat region.

**Mayor, City of Ballarat**

Cr Daniel Moloney



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# Visitor Economy Strategy 2021–2024:


## *A tactical response*

**In May 2021 the City of Ballarat, with extensive collaboration and support from the Visitor Economy sector, launched the *Traveller Experience Plan 2021–2030*. Delivering to the mantra of a Bigger–Bolder–Better Ballarat, the *Traveller Experience Plan 2021–2030* is an innovative plan to celebrate the true personality of Ballarat and thereby assist visitors to experience Ballarat like a local.**

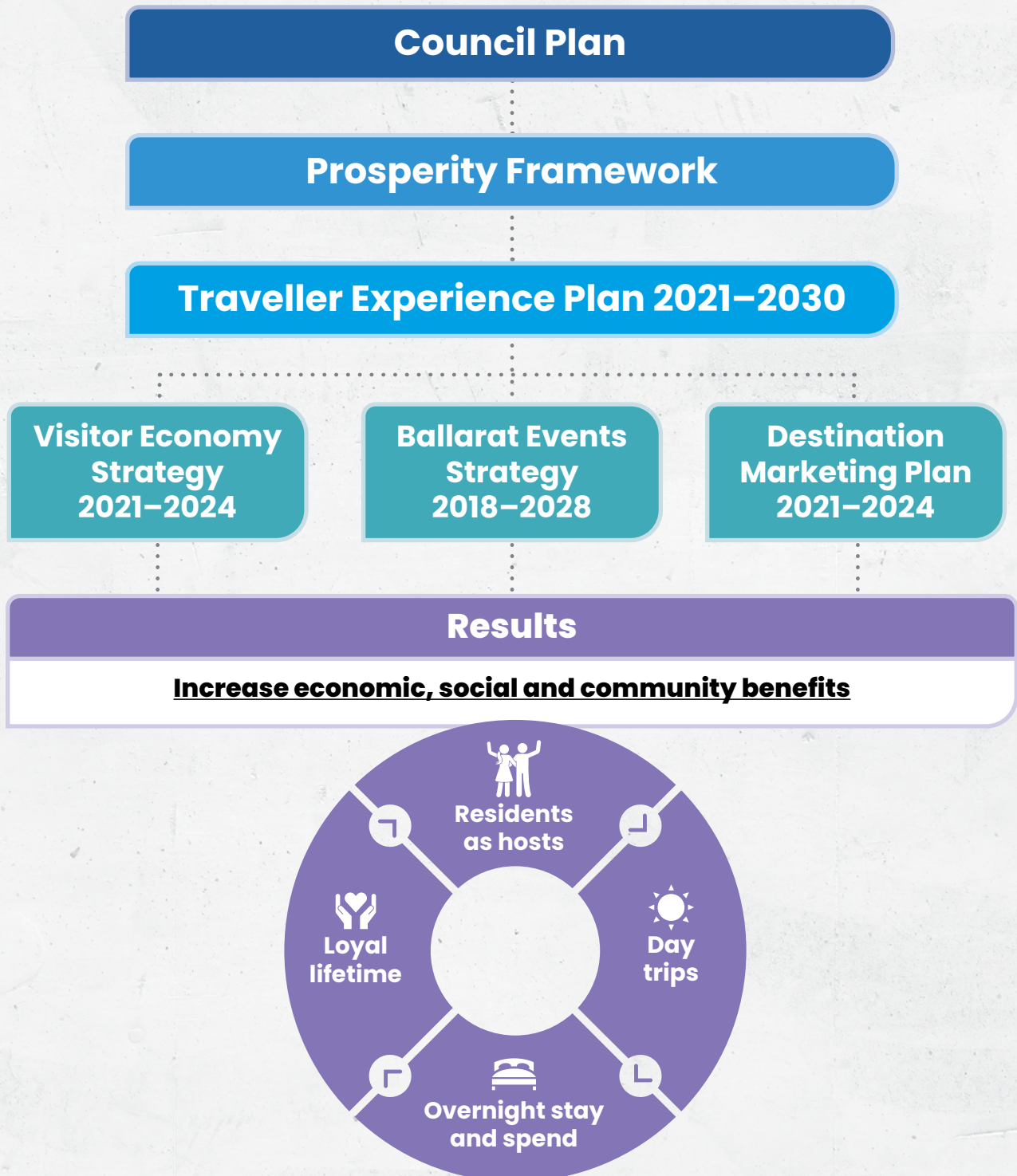
The *Traveller Experience Plan 2021–2030* marks a new approach to attracting visitors to our city - where we once created experiences for visitors, we now wish to curate experiences our locals adore that are authentic, connecting, memorable and worth sharing with visitors. We want travellers to fall in love with our beautiful city over and over again.

Designed as a 10-year foundational document, the *Traveller Experience Plan 2021–2030* sets the direction for the growth and development of tourism for Ballarat. However, what has become obvious from the COVID-19 pandemic is that a short-term tactical strategy is required to focus more directly on recovery. As a result, this *Visitor Economy Strategy 2021–2024* for the reactivation and recovery of Ballarat's Visitor Economy highlights the immediate actions the City of Ballarat and industry can facilitate to support recovery and to shape the future.



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# Context of visitor economy planning



# **Ballarat's core experience offer**

**Ballarat's culture is a reflection and expression of our customs, traditions, heritage, and social character. At the core of our distinctive offering is a deep and honest commitment to quality of place and the uniqueness of the people and stories that bring it to life, give it character and shape its distinction.**

We need to think differently about the potential opportunities this presents and challenge the way we have done things in the past. We need to carve out our position in the destination marketplace and shift to becoming a place of creative connection. This will set us apart from other regional destinations in Victoria. This will mean moving from transactional experiences to more transformational and inspirational visitor experiences.

To achieve this shift, Ballarat needs to develop the quality and diversity of product, experiences, and events to keep visitors in the destination longer and spending more. The experiences need to be consistent with Ballarat's unique point of difference.

As set in the *Traveller Experience Plan 2021–2030*, they are expressed through the intersection of the two core pillars:

## **1. Cultural and creative**

## **2. Contemporary heritage**

These core pillars are at the root of Ballarat's identity and act as anchor points for the types of products, events, and experiences that we need to deliver.

## **1. Cultural and creative**

A fusion of cultural and creative experiences crafted by exceptional artisans, makers, designers, creators, and performers.

## **2. Contemporary heritage**

Experiences that are created against the rich tapestry of Ballarat's history and architecture.

## **Key attributes**

In addition to the two core pillars, the *Traveller Experience Plan 2021–2030* identified Ballarat and the broader region as having significant key attributes that are integral in driving visitation to the region. There are further opportunities to increase awareness, visitation, and yield from these key attributes.

- **Food and drink**
- **Sporting and active**
- **Accessible facilities**
- **Accommodation**
- **Greater Region**
- **Touring routes**
- **Retail**
- **Nature and sustainability**
- **Events**

# Re-imagining the Experience

**In the past, the attractiveness of Ballarat has been treated as a function of a critical mass of heritage buildings and attractions. The Ballarat of today has become a sophisticated hub of culture, inspiration, and innovation.**

Convincing future travellers of this new identity is the challenge. The product and experience gap analysis indicates that we need to rethink the types of experiences we offer and revitalise them.

We need to shift from offering mostly passive cultural heritage experiences such as museums, galleries and architecture to a diverse mix of immersive hands-on cultural and creative experiences from large scale festivals and events to better leveraging our attributes of nature, gardens, sport and the surrounding villages.

To differentiate Ballarat and surrounds as a unique destination, Ballarat will need to create and deliver distinctly local and transformational experiences that are compelling, bold, and sustainable.

Ballarat's unique selling proposition as identified within the *Traveller Experience Plan 2021–2030* is to:

**Reflect on our past, revel in our present and imagine our future.**

This product differentiation will be designed to attract priority target markets, engage locals to share the stories that differentiate Ballarat from other destinations.



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# 2024

**By 2024, Ballarat and surrounds will have restored its visitor economy, and advanced stronger working partnerships with both industry and the community.**

## **Purpose of the Visitor Economy Strategy 2021–2024:**

To rebuild Ballarat’s visitor economy and shape our industry and community for the future.

### **Goals**

This three-year *Visitor Economy Strategy 2021–2024* focuses on the following:

1. Grow visitation spend and increase market share of regional Victorian visitation.
2. Transform the experiences that we offer through innovation and investment.
3. Enhance the capability of our industry to deliver high quality experiences and share knowledge, assets, and resources to amplify the promotion of our city.
4. Build community pride and create a sense of ownership by the community in ensuring our city continues to grow and thrive.

### **Our 5 priorities**

1. Transform the quality and diversity of product, experiences, and events.
2. Attract public and private investment to enhance amenities, transport, and connectivity.
3. Focus on priority audiences and leverage visiting friends and relatives.
4. Invest in community as hosts, partners, and experience entrepreneurs.
5. Create impact and resilience through capacity building and partnerships.

### **Transform experiences to being uniquely “Made of Ballarat”**

After examining each of the priorities, it was determined that central to delivering recovery and growth to the Ballarat region was the focus on transforming product, experiences and events that are unique to the Ballarat region to drive word of mouth, third party endorsement and community advocacy.

The output of these efforts will contribute to achieving the overarching visitation outcomes for the Ballarat region. See diagram below.



# Current operating environment

**The COVID-19 pandemic has resulted in the most significant public health, social and economic challenge Australia has ever experienced. The following section describes the current known impacts that the visitor economy sector is facing.**

## **Economic and social disruption**

Less discretionary expenditure on purchases like leisure travel.

## **Increased competition for domestic tourism**

A shift in traditional markets with closed borders creates increased competition for a greater share of domestic visitors from other regional destinations nationally.

## **Social licence for tourism**

How residents feel about tourism post COVID-19 is important and will determine a destination's success in the long term.

## **Peaks and troughs**

Faster rebound in domestic day trips and intrastate visitation.

## **Visiting friends and relatives travel**

Busier weekends, slower weekdays.

## **Barriers to travel**

Slower recovery in domestic intrastate holiday travel – home schooling, less recreation leave and recession.

## **Air travel**

Domestic airfares to be much higher with a new much smaller Virgin Airlines and less competitive pressure on Qantas.

## **Business-travel recovery slow**

Working from home and virtual platforms along with recession means much less business travel as well as duty-of-care obligations to employees. The working-from-anywhere trend has the potential to blur the lines between leisure and business travel.

## **Industry viability**

Further pain for tourism companies' viability and unemployment issues, that has so far been disguised via Federal support.

## **Consumer sentiment**

Consumer confidence will take time to rebuild. Customers need to be comfortable with all the touchpoints in their experience.

## **Workforce issues**

High weekend demand places stresses on businesses in addition to staff shortages, will affect the quality of experience.

## **Public health measures capacity numbers**

Restrictions, safety precautions, capacity numbers and social distancing measures are restricting viability for some tour operators and businesses.

## **Discounting**

Destinations are actively offering discounts and promotions to entice customers, creating significant challenges in attracting the interstate market.

*Source: 'The Travel Industry Turned Upside Down' Skift Research with McKinsey & Company Sept 2020 & Karl Flowers Impacts of the COVID recession on Ballarat Visitor Economy April 2021*

# Ballarat at a glance in 2021



## Visitors

2021 | 2019  
**1.6m** | **3.4m**

↓ **52%**



## Nights

2021 | 2019  
**1.3m** | **2.6m**

↓ **49%**



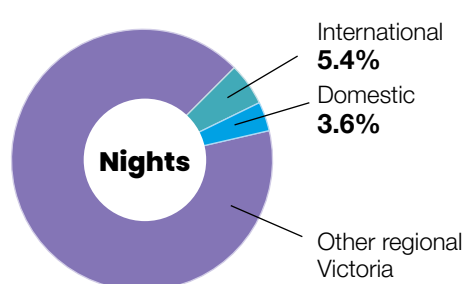
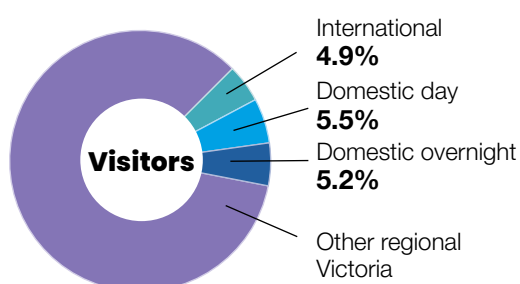
## Expenditure

2021 | 2019  
**\$328m** | **\$613m**

↓ **46%**

Domestic overnight visitors			International overnight visitors			Domestic daytrip visitors		
2021	2019	CHANGE	2021	2019	CHANGE	2021	2019	CHANGE
433k visitors	992k visitors	↓ 56%	N/A	29k visitors	-	1.2m visitors	2.4m visitors	↓ 50%
1.3m nights	2m nights	↓ 40%	N/A	529k nights	-	-	-	-
\$128m expenditure	\$308m expenditure	↓ 58%	N/A	\$32m expenditure	-	\$273m expenditure	\$197m expenditure	↓ 27%

## Our market share of regional Victoria visitation



Where did they stay?		What did they do?		Where are visitor coming from?	
• Friends or relatives property	<b>44%</b>	• Eat out	<b>64%</b>	• Travellers from within Victoria	<b>78%</b>
• Hotel/Motel	<b>27%</b>	• Visit a friend or relative	<b>46%</b>	• Melbourne	<b>14%</b>
• Other commercial accomodation	<b>15%</b>	• Go sightseeing	<b>23%</b>		
• Other private accomodation	<b>14%</b>	• Outdoor/Nature	<b>29%</b>		
		• Arts/Heritage	<b>19%</b>		

**Note: VFR travellers also stay in commercial accomodation. The size of Ballarat's domestic VFR travel segment is 52.8%**

Source: TRA Data

# Opportunities for Ballarat

**It is true that Ballarat has the opportunity for a faster recovery than other parts of the state. Regions like Ballarat are closer to Melbourne with comparatively higher shares of spend on domestic day trips, and short break holidays. Visiting friends and relatives (VFR) domestic visitor nights face a shallower and shorter visitor economy recession.**

In contrast, regions heavily dependent on holiday visitors face a deeper and longer fall in the visitor economy. International and longer break holiday domestic visitor nights are expected to be the slowest sectors to recover.

## **Key Opportunities**

- Beyond the short-term costs from COVID-19 on the visitor economy - Ballarat region's overall economy is to benefit from decentralisation from Melbourne – with two links to local visitor economy:
    1. Once in a generation shift to decentralisation sets regional economy to grow from late 2021, therefore:
      - Working from home is a big win for Ballarat region with improving transport links to Melbourne likely to boost tourism to the region to explore together with growing visiting friends and relatives.
      - Stronger revenues for Local Government Areas with land valuations and population growth increasing strongly.
    2. To impress potential new population to the region that the visitor economy is vital
      - Destinations have incentive to foster tourism business survival and revival to present best face.
      - A café culture and “buzz” of activity and attractions in the evenings will be vital to attracting new residents from Melbourne.
- The Ballarat region benefits from faster population growth locally than in neighbouring regions of Western Melbourne.
  - Australia's inbound tourism should grow quickly due to enhanced reputation for destination safety through COVID-19.
  - Infrastructure improvements are vital to the success of regions in shifting day trips to higher yield overnight stays.

## **Economic outlook and opportunities**

- 2023/24 is the expected earliest return for Ballarat to pre-COVID-19 regional visitor spend.
- Ballarat region's visitor economy will come back very differently – weaker mid-weeks with less business/international/interstate visitors and stronger intrastate day trips/leisure weekends.
- Assist businesses to deal with the risk of bankruptcy – including supporting access to Government supported bank loans.
- Look to build overnight visitation mid-week, to replace lost business, international and interstate visitors.

*Source: Karl Flowers Impacts of the COVID recession on Ballarat Visitor Economy*

# Customer Segments

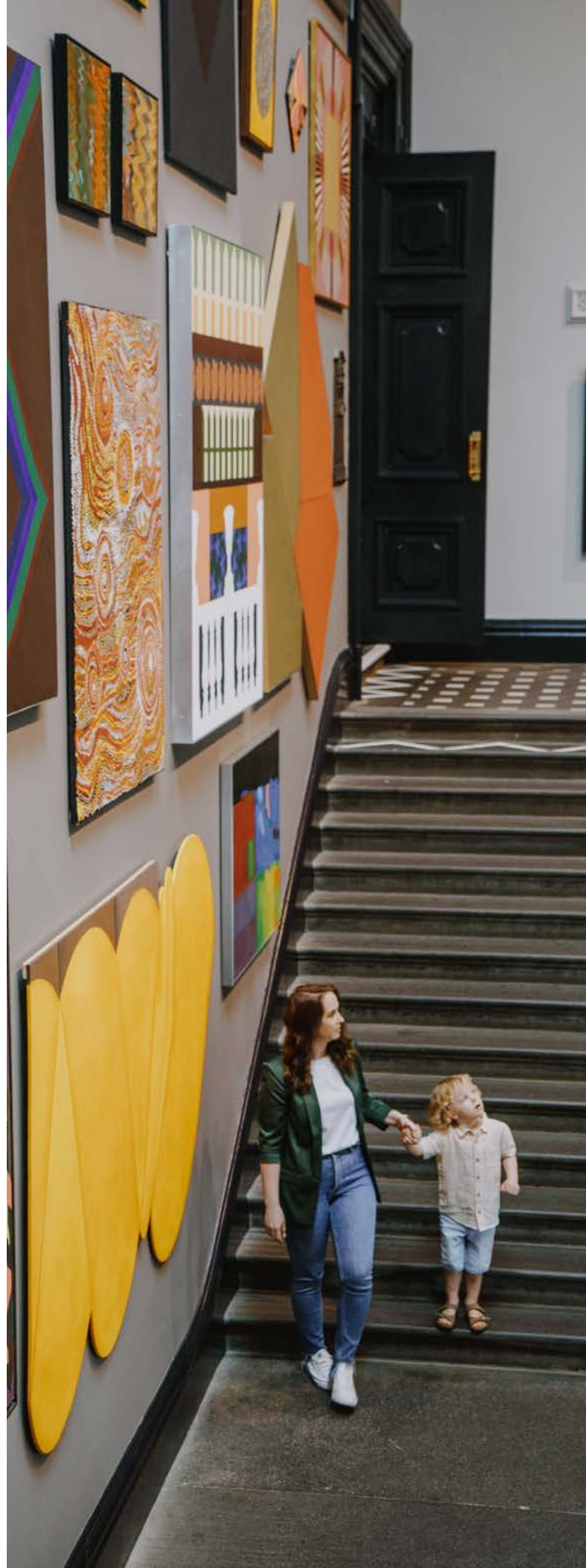
**Customer research was undertaken to identify a clear and reliable profile of the current and potential visitor base for Ballarat. It outlines motivations and visitation behaviours, and gives an understanding of perceptions and attitudes toward Ballarat's existing and prospective future visitor offering.**

## **Active Regional Explorers and Regional Fledglings**

Were identified as new primary targets for Ballarat. Relative to other markets, the impact of destination marketing will have a shorter lead time to attract these engaged and flexible primary markets.

## **Family Heartland and Mature Tastes**

Are identified as secondary targets. Mature Tastes are a relatively lower value segment (fewer trips/nights and relatively lower spend), but they naturally align with Ballarat's facilities and offering so are available for conversion. Family Heartland are a challenge for Ballarat to convert as they are among those least likely to consider if Ballarat is the right destination for them. However, this is a positioning issue which can be addressed since Ballarat offers most of what they look for.



📷: [mattdunnephoto](#)

# 1

## Active regional explorers:

**Travelling in regional Victoria is a regular part of our life.**

### Who are they?

Spend the most per night and spend more nights away than any other segment.

- Skew younger, often at family life stage.
- Metro Melbourne suburbs.
- Educated, curious and enthusiastic.

### What defines them?

- Engaged across channels, travel extensively and widely, participate in a broad range of activities.
- Seek out enriching experiences; aspire to more than just 'relaxation'.
- Do not conform to one trip 'type', they arrange different itineraries to suit different needs.

### Visitation habits:

- Take weekend and extended trips, typically touring to cover more than one activity.
- Above average spend, prioritise recreation in their budget. Can include VFR spends.
- Engage in one or more outdoor pursuits, often cycling, fishing, or getting into National Parks.

### Engaged by:

- Constant lookout via. all channels for what is new or different in regional Victoria.
- More likely to engage with art, culture, history and attend structured ticketed attractions.



📷: [mattdunnephoto](#)

## 2

# Regional fledglings:

**We can find cool things to do by leaving the city and getting out there.**

### **Who are they?**

Make more frequent day and short overnight trips than other segments. More likely to consider Ballarat in-scope for a daytrip (if metro-based). Are flexible to consider and convert to visiting Ballarat (as well as other destinations).

- Young singles and couples may travel as groups of friends.
- Metro-based and urbanised tastes.
- Following emerging trends, not their parents' example.

### **What defines them?**

- Explore though visitor-oriented producers, events/festivals, local operators, etc.
- Food and wine focus and have the budget to support it.
- Lighter touch in the outdoors, may camp or bushwalk but it's principally a social endeavour.

### **Visitation habits:**

- Travel often, but typically on short weekend breaks or daytrips.
- Emphasis on AirBNB-type accommodation.
- Trips commonly based around a half-day hike/bushwalk.

### **Engaged by:**

- Social media, review sites, and official tourism/destination sites.
- Modern dining, wineries, craft beer, music events/festivals, novelty, and intrigue.



📷: [@mattdunnephoto](#)

### 3

## Mature tastes:

### **Good food, good wine, taking it easy for a few nights in pleasant surroundings.**

Ballarat region is above average in its reliance on over 55 domestic overnight travellers (2017/18 data).

Source: TRA online

#### **Who are they?**

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

#### **What defines them?**

- Value taking it easy and relaxing over a packed itinerary.
- Self-identify as a foodie, make planned dining arrangements, and seek out produce.
- Visitation centred around townships, not nature.

#### **Visitation habits:**

- Schedule a handful of overnight trips per year, tending to be pre-planned rather than spontaneous.
- Traditional country visitor, motel stay, township shopping, etc.
- More likely to be led by a female decision-maker.

#### **Engaged by:**

- Modern (but in comfort zone) food and wine offering.
- Spending time in picturesque settings (but limited proactive engagement e.g. art gallery).
- Brochures, information centres, etc. support online research.





# 4

## Family heartland:

**Booking something during school holidays is a chance for everyone to catch their breath.**

### **Who are they?**

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

### **What defines them?**

- 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, expressed as conventional child-oriented fun.

### **Visitation habits:**

- 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'.

### **Engaged by:**

- Days out, attractions, traditional family fun.
- Side-trip into nature or National parks, but not the focus.
- Focussed on online reviews.

### **Opportunities:**

Aligns with Ballarat's core traditional offering, including Sovereign Hill and other attractions.



📷: [mattdunnephoto](#)

# Visitor profiles



## **Domestic day trippers**

Almost half are visiting from regional Victoria, followed by Melbourne (44%) and other states.

Most day trippers are coming to Ballarat to visit friends and relatives (34%) and holiday (32.1%), and almost 20% travel to Ballarat for business.

Average expenditure is \$101 per visit.

Around one third are aged between 35-54 years and 15-34 years' (25.8%) and '65 over' (23.4%).

They are most likely to participate in social activities and enjoy Ballarat's outdoors and sporting activities.



## **Domestic overnight visitors**

Are mostly from Melbourne, followed by regional Victoria and other States (NSW and SA).

Their main reason to travel is to visit friends and relatives, closely followed by holiday and, to a lesser extent, business.

The majority stay for around two nights with friends and relatives as well as commercial accommodation.

The average expenditure per night \$149 per night.

The majority are aged 35-54 years (38.0%), followed by '15-34 years' (27.3%) and '65 and over' (20.9%).

Eating out is the most popular activity, followed by catching up with friends and relatives, and enjoying Ballarat's outdoors and sporting activities.



## **International visitors**

Most international visitors visit Ballarat as part of a holiday.

They are mainly from New Zealand and Asia, followed by United Kingdom and Europe.

They enjoy social activities, outdoor activities, sports and enjoy local attractions.

The average expenditure per night is \$66.

# Strategic priorities and actions

<b>1. Transform the quality and diversity of product, experiences, and events</b>		
<b>1.1 Build and innovate experiences that deliver on the key pillars</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
1.1.1 Develop customer journeys for all priority audiences and identify opportunities and product gaps and build itineraries with industry.	December 2021	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> </ul>
1.1.2 Develop a shovel ready business case for the creation of a CBD focused night-time economy. Business case to include events, culinary experiences, way finding, lighting and illumination, and public art installations.	June 2022	
1.1.3 Explore opportunities for indigenous tourism that offers product and interpretative signage, and storytelling threaded through our visitor experiences.	Ongoing	
<b>1.2 Build and innovate on the key supporting attributes of Ballarat that drive visitation</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
1.2.1 Continue the implementation of the <i>Ballarat's Creative City Strategy</i> .	Ongoing	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> </ul>
1.2.2 Complete <i>Tourism Product Development Plan</i> aligned to the core experiences and key attributes (identified in the <i>Traveller Experience Plan 2021–2030</i> ).	December 2021	
1.2.3 Identify and seek funding for tourism development product/ infrastructure opportunities aligned with the Core Experiences and Key Attributes (identified in the <i>Traveller Experience Plan 2021–2030</i> ) that incorporate both demand and supply experiences.	Ongoing	
1.2.4 Encourage more dedicated activities on nature-based assets such as Lake Wendouree, Lake Burrumbeet, Lake Learmonth.	Ongoing	
1.2.5 Advocate for existing touring route models to become more agile and versatile with a focus to relevant domestic markets for the short to medium term. eg Great Southern Touring Route.	Ongoing	

## Strategic priorities and actions

### 1. Transform the quality and diversity of product, experiences, and events

#### 1.3 Revise the Ballarat Events Strategy to build on brand equity and increase visitation and spend

Outputs	Timeframe	Responsibility
<p>1.3.1 Deliver a revised <i>Ballarat Events Strategy 2018–2028</i> that:</p> <ul style="list-style-type: none"> <li>• Aligns with Ballarat’s destination branding,</li> <li>• Encourages visitation across an annual calendar, and</li> <li>• Includes regular anchor events for stability and one-off events for freshness and that are unique and exclusive to Ballarat.</li> </ul>	July 2021	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> </ul>
<p>1.3.2 Create leveraging opportunities with industry to increase spend:</p> <ul style="list-style-type: none"> <li>• Event extensions/programming to convert day-trippers to overnight visitors.</li> <li>• Encourage industry partnerships to increase the product proposition for visitors and to provide greater leveraging opportunities for businesses to promote direct to event audiences.</li> <li>• Support industry to develop packaging of event with accommodation, attractions, and other experiences.</li> </ul>	Ongoing	
<p>1.3.3 Seek a major biennial signature event for Ballarat which builds on the region’s creative strengths.</p>	Spring 2022	
<p>1.3.4 Keep the doors open; continue delivering all scheduled City of Ballarat events within the COVID-19 restrictions of the day.</p>	Ongoing	
<p>1.3.5 Support industry in re-building the business events sector to support mid-week activation:</p> <ul style="list-style-type: none"> <li>• Undertake audit of resources.</li> <li>• Identify critical partners.</li> <li>• Identify roles and responsibilities.</li> <li>• Create a business events landing page/portal to support the attraction of weekday business events on <i>ballarat.com.au</i>.</li> </ul>	August 2021	
<p>1.3.6 Amend <i>Tourism Events Grant Fund</i> to be more agile, timely and responsive to market needs.</p> <p>Refine the <i>Tourism Event Grant Fund</i> guidelines to;</p> <ul style="list-style-type: none"> <li>• Ensure funded events are generating a sound economic return,</li> <li>• Are directly benefitting the Visitor Economy, and</li> <li>• Ensure funded events are aligned with our brand and strengths.</li> </ul>	July 2021	
<p>1.3.7 Develop an event acquisition budget to actively attract compelling events that align with our brand and strengths and support mid-week and annual calendar gaps.</p>	July 2021	

## Strategic priorities and actions

<b>2. Attract public and private investment to enhance amenities, transport, and connectivity</b>		
<b>2.1 Work with private and public sector to attract investment and prepare business cases for infrastructure projects that support the <i>Traveller Experience Plan 2021–2030</i></b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
2.1.1 Work with Victorian Government to roll out a <i>Destination Management Plan</i> for the region that underpins and aligns with current state planning.	June 2023	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Other Regional Tourism Boards and Local Government Areas</li> </ul>
2.1.2 Identify and seek funding for three short term investment-ready catalyst projects.	June 2022	<ul style="list-style-type: none"> <li>• Industry</li> </ul>
2.1.3 Actively support current investment projects not limited to: <ul style="list-style-type: none"> <li>• Art Gallery of Ballarat</li> <li>• Ballarat Railway Hub</li> <li>• Australian Goldfields UNESCO World Heritage Bid</li> <li>• Ballarat National Centre for Photography</li> <li>• Dedicated Sports Museum centrally located in Ballarat</li> </ul>	Ongoing	
2.1.4 Support Commerce Ballarat, Ballarat Regional Tourism, and Committee for Ballarat with Victorian Government funding/support initiatives.	Ongoing	
2.1.5 Work with industry to identify potential infrastructure projects and develop business cases to seek funding.	Ongoing	
<b>2.2 Facilitate investment by promoting and communicating a prospectus of opportunities and reducing barriers to private delivery and funding for visitor economy infrastructure</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
2.2.1 Create a prospectus promoting that Ballarat is open for business for projects that enhance and grow the visitor experience.	December 2021	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>
<b>2.3 Improve connectivity and signage</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
2.3.1 Scope a connectivity and wayfinding masterplan that considers gateway signage, technology, and transport.	June 2022	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>
2.3.2 Implement the connectivity and signage plan.	June 2024	
<b>2.4 Continue to implement the Ballarat Creative Precinct Master Plan</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
2.4.1 Formalise partnerships between stakeholders to unlock public assets and incentives to attract investors	June 2022	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>
2.4.2 Continue seeking funding for the implementation of the Creative Cities Masterplan.	Ongoing	

## Strategic priorities and actions

### 2. Attract public and private investment to enhance amenities, transport, and connectivity

#### 2.5 Creating enhanced experiences – Actively explore three new product and event opportunities through available funding and private sector partnerships.

Outputs	Timeframe	Responsibility
2.5.1 Prepare a product development plan that supports demand and supply drivers and embraces sustainability technology objectives outlined in the Council plan.	December 2021	• City of Ballarat

### 3. Focus on priority audiences and leveraging Visitor Friends and Relatives

#### 3.1 Develop a strategic marketing plan that identifies the target markets to match supply and demand

Outputs	Timeframe	Responsibility
3.1.1 Develop a three-year marketing plan that: <ul style="list-style-type: none"> <li>• Confirms brand evolution and invests in execution of brand in line with the <i>Traveller Experience Plan 2021–2030</i>.</li> <li>• Develops and adopts a thematic approach that aligns and complements Sovereign Hill to build campaigns and product around the four seasons: Winter, Spring, Summer and Autumn.</li> <li>• Intervenes in market to address peaks and troughs in visitation throughout the year.</li> <li>• Regular briefs to industry on how to align their products and marketing to our priority audiences.</li> </ul>	December 2021	• City of Ballarat

#### 3.2 Develop a major Visit Friends and Relatives (VFR) campaign

Outputs	Timeframe	Responsibility
3.2.1 Dedicated annual VFR plan to include: <ul style="list-style-type: none"> <li>• Tactical plans that increase the awareness of local product and locals advocating.</li> <li>• Development of a local's pass/locals passport concept to Ballarat's key attractions for VFR (Visiting Friends and Relatives) development.</li> <li>• Pursue "We are Ballarat" campaign – brand ambassadors – align to VFR.</li> </ul>	November 2021	• City of Ballarat

## Strategic priorities and actions

### 3. Focus on priority audiences and leveraging Visitor Friends and Relatives

#### 3.3 Promote Ballarat's sporting, cultural, participation and spectator events to increase visitor demand and visitor expenditure

Outputs	Timeframe	Responsibility
3.3.1 Continue to explore opportunities with industry for greater leveraging from business and sporting events. <ul style="list-style-type: none"> <li>• Cohesive business and sports events approach.</li> <li>• Coordination of event calendar, open days, attractions to encourage multiple activities to encourage an extended stay.</li> <li>• Develop opportunities for industry to pre-promote to the sports events visitor.</li> <li>• Develop opportunities for industry to leverage off the sports events visitors, once they are in Ballarat.</li> </ul>	Annually	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> </ul>

### 4. Invest in Community as hosts, partners, and experience entrepreneurs

#### 4.1 Develop a community awareness campaign to increase understanding about the benefits, opportunities of tourism and the role of residents as hosts

Outputs	Timeframe	Responsibility
4.1.1 Foster local community and industry engagement through the establishment of a Ballarat Host/Ambassadors program to promote Ballarat and identify opportunities to which we need to adapt.	June 2022	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>
4.1.2 Amplify itineraries for visiting friends and relatives to share with residents and promote Ballarat's experiences and local culture.	Ongoing	
4.1.3 Undertake visitor and resident sentiment monitoring to determine levels of interaction and satisfaction and improve outcomes.	Both at the end of 2021 and the end of 2024	

#### 4.2 Evolve visitor servicing to an elevated experience by sharing people, place and produce stories and offering "wow" experience

Outputs	Timeframe	Responsibility
4.2.1 Review and complete a Visitor Servicing Plan to remain responsive to our markets: <ul style="list-style-type: none"> <li>• Develop a Citywide Visitor Services Plan</li> <li>• Review current Visitor Servicing operations</li> <li>• Develop visitor centre experience and offering.</li> <li>• Identify digital means and hotspots for visitors.</li> </ul>	October 2021	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>

## Strategic priorities and actions

<b>5. Create impact and resilience through capacity building and partnerships</b>		
<b>5.1 Leadership and Advocacy</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
5.1.1 Lead State Government advocacy on the Regional Tourism Review.	Ongoing	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> <li>• Ballarat Regional Tourism</li> </ul>
5.1.2 Advocate at every level of government on behalf of and with industry.	Ongoing	
5.1.3 Formalise the cross-sector collaborative task force of industry leaders and key partners for implementation and monitoring of the plan.	Six-monthly meetings coordinated by the City of Ballarat.	
5.1.4 Provide peer to peer business support.	Ongoing	
5.1.5 Continue to streamline regulatory processes and red tape to support industry to increase outdoor dining capacity.	Ongoing	
5.1.6 Support industry in identifying and converting innovative spaces and ways to operate.	Ongoing	
5.1.7 Continue to implement the Ballarat actions of the <i>Grampians Visitor Economy Workforce Development Strategy</i>	Ongoing	
5.1.8 Complete destination crisis plan that addresses tourism stakeholder communications during crisis to ensure clear and coordinated approach to crisis preparedness, management, and recovery.	June 2022	
<b>5.2 Develop an industry development, training, and networking program – deliver alignment opportunities to our core primary audiences</b>		
<b>Outputs</b>	<b>Timeframe</b>	<b>Responsibility</b>
5.2.1 Launch a new visitor economy industry resource hub on ballarat.com.au for businesses to access data, funding streams and industry development opportunities.	December 2021	
5.2.2 Encourage industry excellence and connection through capability building and sharing knowledge.		



## Strategic priorities and actions

### 5. Create impact and resilience through capacity building and partnerships

#### 5.2 Develop an industry development, training, and networking program – deliver alignment opportunities to our core primary audiences

Outputs	Timeframe	Responsibility
5.2.3 Industry Engagement checklist: <ul style="list-style-type: none"> <li>• Educate industry on what the key audiences find compelling.</li> <li>• Encourage industry to talk about Ballarat and share content of other experiences beyond their own.</li> <li>• Coordination of opening hours for businesses – accessibility.</li> <li>• Support industry sustainability.</li> <li>• Development of Ballarat's industry communication channels – use social media for real time updates.</li> <li>• Work with education providers like Federation University Australia to promote a higher standard of education and training.</li> <li>• Build understanding in both priority segments and product development opportunities to lift the experience in Ballarat.</li> </ul>	June 2022	<ul style="list-style-type: none"> <li>• City of Ballarat</li> <li>• Industry</li> </ul>

#### 5.3 Establish and maintain regional tourism data

Outputs	Timeframe	Responsibility
5.3.1 Develop industry-facing regional data reports for distribution for the purposes of reporting and future decision making. Distribute through industry communications and an industry hub on <i>ballarat.com.au</i> .	December 2021	<ul style="list-style-type: none"> <li>• City of Ballarat</li> </ul>

# Measurement targets

**To achieve the agreed purpose of rebuilding Ballarat’s visitor economy and shaping the industry and community for the future, five measurement targets are proposed to measure our success.**

Central to this plan is the refresh and revitalisation of experiences designed to increase visitation through word of mouth, marketing, and enhanced community engagement.

## **Attracting more visitor nights in Ballarat**

Key Performance Indicators:

- By 2023/24 increase visitor nights to 2018/19 levels
- Increase percentage of market share of visitor nights in regional Victoria.

## **A visitor economy that has rebounded and gained market share in regional Victoria when compared to pre-COVID levels**

Key Performance Indicators:

- Ballarat region visitor spending (\$M) and total employment to meet forecasts for 2023/24.

	<b>Pre Covid 2018/19</b>	<b>Forecasts for 2020/21 – peak year of COVID impacts</b> <i>(Decisive Consulting forecasts)</i>	<b>Targeted 2023/24</b> <i>(Decisive Consulting forecasts plus 5% in visitor spend compared to regional Vic forecasts)</i>
<b>Total Visitor Expenditure</b>	\$696m	\$547m	\$719m
<b>Market Share in regional Victoria</b>	4.6%	4.9%	4.9%
<b>Jobs due to total impacts (direct and indirect) of visitor spending</b>	4,872 jobs	3,849 jobs	5,035 jobs

## **Increased awareness of the value of the visitor economy and benefits to the community.**

Key Performance Indicators:

- Increase the reach and frequency of tourism messaging to the community.
- Surveys in late 2021 and 2024 on the attitudes of the Ballarat community to the visitor economy.

## **Our ability to transform the experiences we offer through investment and product development.**

Key Performance Indicators:

- New and reinvigorated products, experiences and events by providing more support and/or funding, as well as attracting, those events that align with our brand.

## **Increase the quality of the visitor experience by surveying businesses in late 2021 and 2024:**

Key Performance Indicators:

- Monitoring social media comments
- Responding to feedback
- Delivering service and experience improvements



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