



# Traveller Experience Plan 2021–2030



Visit  
Ballarat



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.

## Contents

Invitation to join the journey	4
The purpose	5
Context for visitor economy planning	6
The future of tourism	7
Co-designing future experiences	10
Global inspiration	11
Core attribute pillars	13
Challenge the status quo	14
Experience gaps	15
The way forward	16
Key attributes	19
Visitor profiles	25
Ballarat's visitor economy	26
Tourism performance	28
Our market share	29
Drivers of domestic travel to Ballarat	30
Overarching destination marketing recommendations	31
Priority visitor audiences for Ballarat	32
Five strategic priorities	38



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

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# Invitation to join the journey

**Ballarat's recognition as a contemporary 21st century city is on the rise, but convincing future travellers of our unique identity will be our challenge and opportunity.**

Whilst we have experienced unparalleled tourism growth in recent years, and we are the fourth most popular regional destination in Victoria we are perceived as a heritage destination and not for the new experiences that are evolving.

For those who know us, we are a sophisticated bunch living in a hub of creativity and culture, inspiration and innovation that are expressed through our customs, traditions, active pursuits, and social character. We have a deep and honest commitment to the uniqueness of our heritage, our community and the stories that bring our city to life. We want travellers to feel how we do about our region and fall in love with it, just like the people who call it home.

As we head toward 2030, we welcome tomorrow's travellers who emotionally connect with our city, who relish discovery and surprise, find joy in cultural and creative immersion, appreciate our authentic heritage and savour active adventure.

Co-designed with our community, industry and the Wadawurrung people, the *Traveller Experience Plan 2021–2030* supports our city's aspiration of being a place that is innovative, courageous, and inspiring.

It is not a copy and paste of what other destinations are doing; instead, we have written our own story. We have investigated what makes us unique, what distinguishes us from others, and ultimately what will attract others to visit, to visit again and to stay.

The focus on the traveller considers how people feel before during and after their experience. People feel surprised to learn Ballarat has such breadth and diversity of experiences.

People feel connected when they are here. They have learnt about what makes us who we are today, they feel immersed in the experiences on offer, they feel excited about what the future holds.

People feel like they have only tasted a part of who Ballarat is, they wonder if they need to explore more, they dream about what a life could offer them here. They start to question if their lives could tap into a potential this city has to offer.

By implementing the *Traveller Experience Plan 2021–2030*, we are embarking on a journey with the shared ambition of creating sustainable and long-term value for Ballarat and its residents and lifelong memories for those we host.

**We invite you to join us on  
this journey.**

# The purpose:

## *Traveller Experience Plan 2021–2030*

### **A co-designed plan to:**

- Reveal and examine what makes our city unique
- Guide the creation and delivery of aspirational experiences that match the authenticity and the essence of Ballarat's people and sense of place
- Create lifetime brand loyalty with our priority audiences
- Highlight gaps and opportunities for both product and infrastructure to enhance the visitor experience
- Outline the strategic priorities to deliver on the plan and inform the basis of an action and implementation plan in the proceeding Visitor Economy Strategy

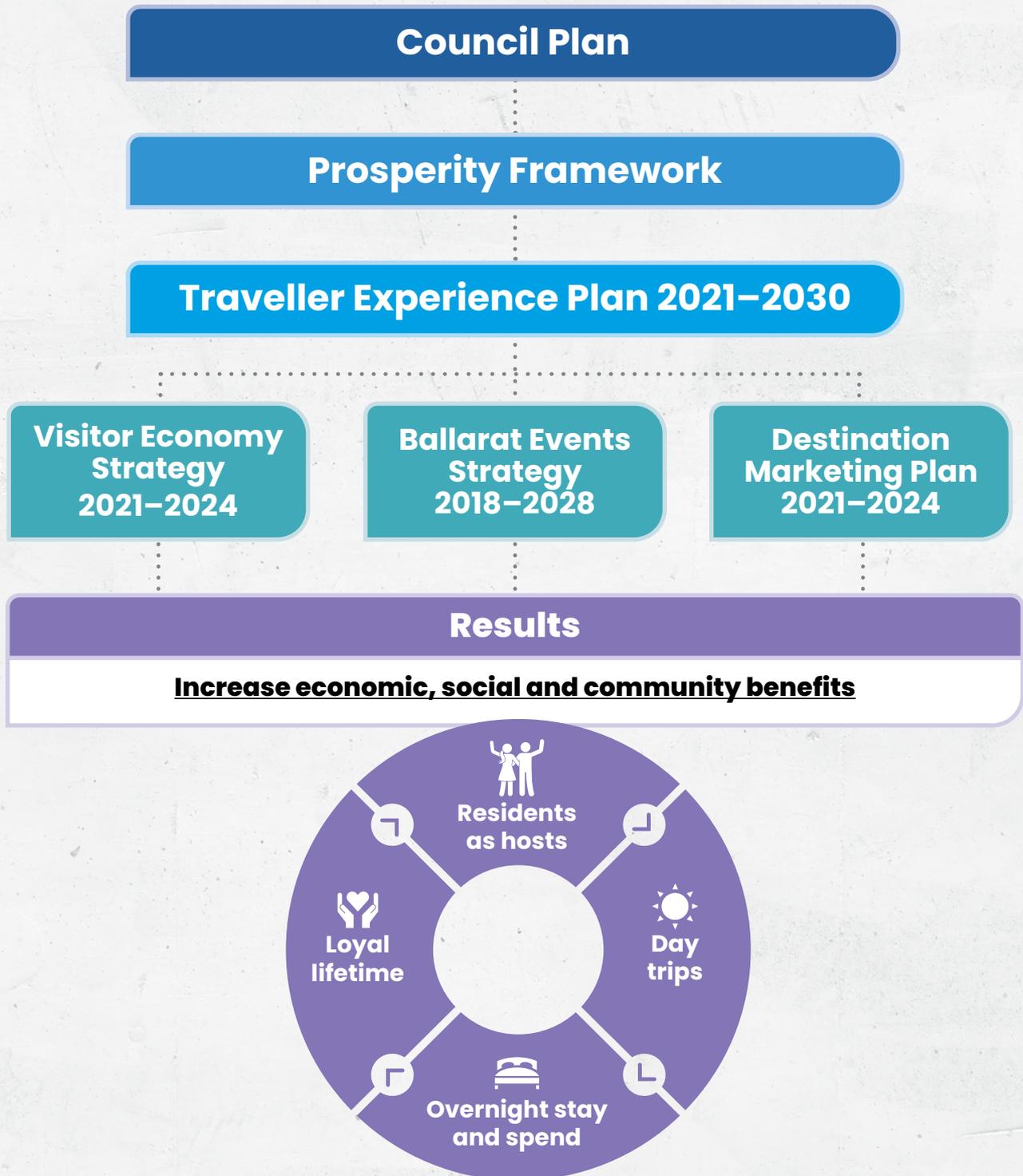
### **Goals:**

- Deliver content that builds equity in Ballarat's unique proposition
- Leverage Ballarat's strong visiting friends and family market and ensure the community share the benefits
- Increase conversion and yield of priority audiences
- Grow reputation of Ballarat as an enticing place to live



📷: [chip\\_shots](#)

# Context of visitor economy planning



# The future of tourism

**While the pandemic was a disruptive force, in many ways it added to the exponential change that was already occurring. We have witnessed a powerful aspect of how technology is transforming user experiences. Consumers are dictating how, where, what, and when they consume a particular product, service, or experience. The distinction of online and offline is now blurred. For example, people will work where they can be most productive, in central locations for larger meetings, in satellite offices for collaboration, and remotely for independent projects.**

During the pandemic, brands relied on engaging with their customers and potential customers across social media. Going forward, there will be a big push toward a more authentic presence on social media and one that is less curated by social media experts, such as real behind-the-scenes look at people and business. Destinations of tomorrow will need to find their place in that cross-section of innovation while also balancing a close link to the public sector planning and recovery.

## **Economic and social disruption**

The global pandemic has resulted in disruption to economics, politics, and our everyday life and will catalyse a new generation of tourism. A recovering global economy has implications for domestic travel with less discretionary expenditure of purchases like leisure travel and softening of international visitor growth to Victoria and the region. Except for the 'boomers' and seniors' markets, domestic travellers are time poor, hence 'short breaks', and visiting friends and relatives' markets will continue to be the major opportunity for Ballarat.

*Source: Covid Facts and Insights McKinsey and Company, April 2020*

## **Increasing competition for domestic tourism**

We will see a shift in traditional markets; Australian border closures affect international travel resulting in increasing domestic tourism in the next few years. At the same time there will be increasing competition for a greater share of domestic visitors from other regional destinations across Australia. This means Ballarat will need to offer experiences so powerful they compel visitors to choose Ballarat over other destinations.

*Source: Tourism Australia Webinar July 2020*

## **Generational shifts**

Generations X and Y now make up most of the workforce and the family market as Baby Boomers retire. Gen Z are now entering the workforce and have different values and preferences than those who came before. Social connection and conscious consumerism will generate demand for sustainable practices, carbon positive products and experiences. This will require the tourism sector to demonstrate their commitment to sustainability.

*Source: Megatrends Defining Travel in 2021. Skift Inc, 2020*

## **Sustainability**

Sustainability has been a concern for some time, but during the pandemic, emphasis shifted. As disruptive as the coronavirus was to business, companies are recognising the environmental crisis could be much more damaging to the world as well as their bottom line. The City of Ballarat's initiatives associated with climate change are nudging the behaviour of its residents toward sustainable living.

## **Social licence for tourism**

How residents feel about tourism is also becoming increasingly important and will determine a destination's success in the long term. Community sentiment is guiding tourism planning and development, and there is a growing expectation that tourism will generate positive social, environmental, and economic benefits for the host communities.

*Source: Megatrends Defining Travel in 2020, Skift inc, 2020*

## **Locals are the experience**

The cultural economy has continued to develop in recent years, producing a further shift away from the patronage and subsidy of high culture towards support for the creative industries fuelling the emergence of co-created culture. Travellers are seeking immersive experiences anchored in local culture. Cultural and creative elements of destinations are becoming increasingly embedded in tourism products that reflect everyday life as in the case of 'live like a local' experiences, offered by other creative cities, such as Copenhagen.

*Source: The end of Tourism As we Know it, Copenhagen, Wonderful Copenhagen, 2017*

## **Branding is all about people**

Marketing no longer leads us to the brand: the relationships we have with other people do. Today, with the proliferation of social media, information is created by everyone and available to everyone. Travellers look to peer recommendations from family, friends and their social circles – much like they always have, but today the scale of connectivity between people has taken on entirely new dimensions, making recommendations and the conversations they entail much more important to destination branding than ever before. The destination no longer broadcasts a general brand message to many, but instead enables personal brand stories to be told through the right people to a broader circle of people.

*Source: Forbes.com the Golden Rules of Personal Branding*

## **Real time data is king**

Due to the rise of the digital revolution, everyone and everything today generates new data. Popular methods of data collection are reinforced by the access to digital data available in real time. Through passive measurement, the use of digital big data can provide accurate often real-time depictions of actual visitor behaviour, tourism trends and new business potential. In a data-driven, experience-driven world, there is a need to move beyond bed-nights and extend to the broader value creation within the visitor economy.

*Source: Forbes.com Why data is king during times of uncertainty*

## **New opportunities for Regional Victoria**

House prices in every regional area of Victoria experienced price growth over the past year, with some regions up by as much as 18 per cent according to the latest Domain House Price Report Jan 29 2021. Ballarat is perfectly placed to capture much of this regional migration with high quality schools, health care and strong transport links to Melbourne.

*Source: realestate.com.au/news.*

## **Most liveable regional cities in Australia**

Ballarat was named Australia's most liveable regional city in 2020. The city performed best for access to public transport and public open space in the analysis by RMIT University and ranked in the top five for access to supermarkets, local employment, services, and housing affordability. Geelong and Bendigo also ranked highly, performing strongly across several liveability measures.

*Source: RMIT Centre for Urban Research*

## The future of tourism

### **Rise in cultural tourism**

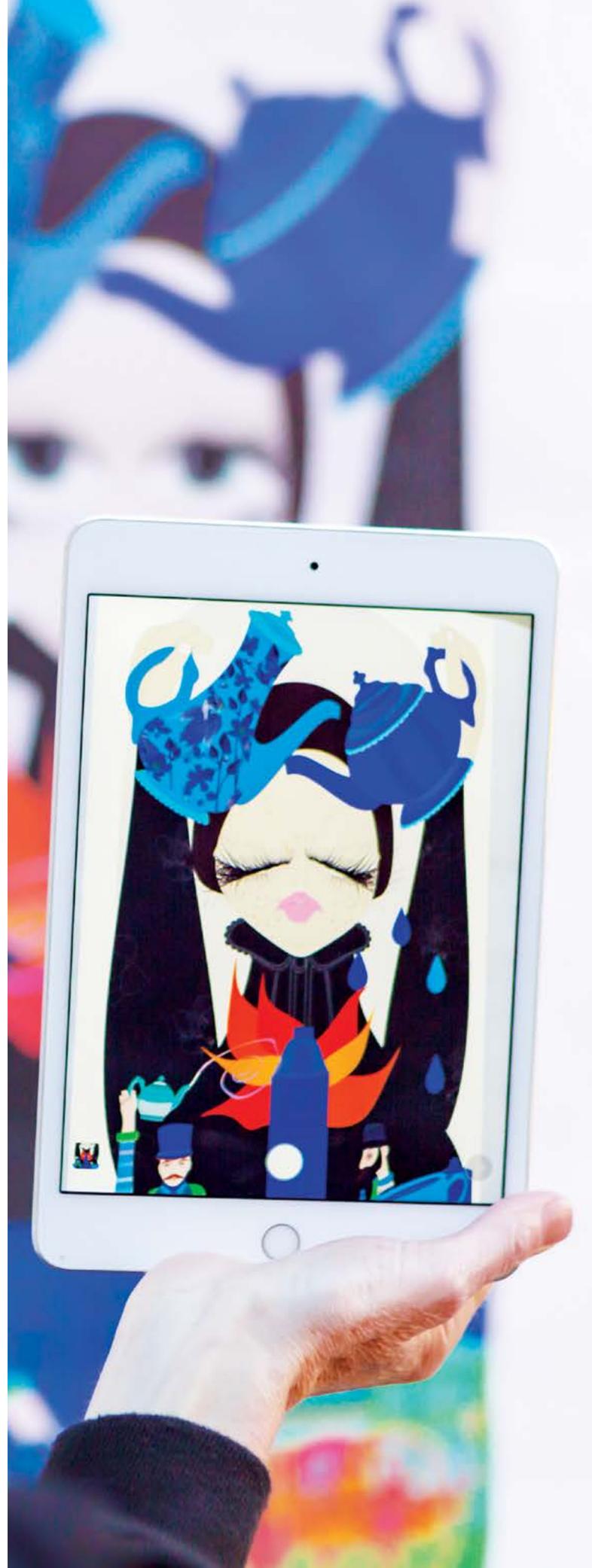
Tourism is both an economic driver and an engine for increased understanding and empathy between different communities. Arts and culture destinations are key factors in determining where people choose to travel. Cultural tourism inspires connection, empathy, and a renewed appreciation for the ways of others. Communities understand the role that arts and culture have in strengthening tourism, regional identity, and person-to-person connection.

The arts appeal not only to domestic audiences but also to foreign ones, with a significant number traveling specifically to experience new cultures. According to the Domestic Arts Tourism report produced by the Australia Council for the Arts in 2020 the number of Australians engaging with the arts while exploring their own country are growing- in 2018 Australians took 12.3-million-day trips and 13.4 million overnight trips within Australia that included arts activities. The destinations where tourists are especially likely to engage with the arts are in regional Australia. Arts tourism tends to align with travelling further, staying longer, and spending more. Ballarat had the highest proportion of arts activity for day trips between 2015-18 and is the region where visitors were most likely to engage with the arts (11% of visitors engaged with the arts).

These trends suggest that Ballarat will need to invest in infrastructure, product, and experiences that:

- Grab the attention of the Gen Y and Gen Z for a short break market
- Reflect the unique qualities of Ballarat and are anchored in the local culture
- Connect the community and their friends and relatives that visit
- Make visible contributions to a sustainable and a carbon-positive future
- Contribute social benefits to the community

*Source: Domestic Arts Tourism report produced by the Australia Council for the Arts*



**Artist and educator:** Margie Balazic tests her augmented reality artwork activated as part of the 2019 Ballarat Winter Festival Activated ArtWalk.   chip\_shots 9

# Co-designing future experiences

Industry leaders participated in a series of online forums generating a dynamic list of authentic and powerful future experiences

and what our visitors would be saying and feeling by visiting Ballarat in 10 years time.

"The city comes alive in new ways every night with the coolest venues. I had the opportunity to savour some regional wines and local beer on an ornate balcony hidden away in a laneway. My partner thought it was the best date I have ever taken her on!"

**#InLoveInBallarat**  
**#InLoveWithBallarat**  
**#contemporaryheritage**

"I just saw TeamLab Gold! Japanese digital expressionism in a deep underground vault...300m beneath Ballarat! See the clash of old meets new! I felt like I was in a gold rush mine but in 2050 at the same time!"

**#IncredibleBallarat**  
**#TheDigitalUnderground**

"The recent investment in Sovereign Hill and the Eureka Centre have made them truly world class attractions – I've just spent the day completely immersed in the story of democracy and Australia's rare trades."

"I spent the afternoon in an engaging session understanding the history behind the possum skin coat – it is amazing to finally see it!"

**#WadawurrungCountry**

"I spent hours in the art laneways in Ballarat CBD. I enjoyed the sense of discovery, the secrets I unveiled, the authenticity. These buildings speak to me!

I spent hours just wondering, nourishing my creativity in the cafes and galleries along the way. Diving into the stories of this city."

**#HiddenBallarat**

"Took some friends visiting from Melbourne to The Buninyong Farm which was all paddock to plate, and permaculture. Move over Brae! I have found my happy place! Next level food that honours the produce and setting."

**#theoriginalorganic**

**"Just did my first gin distilling course, and now off to lunch before heading for another craft workshop with the girls."**

"Public art everywhere! Interactive, compelling, surprising!"

**#CreativeBallarat**

# Global inspiration

**International Benchmarking of other international UNESCO Creative Cities with a strong tourism focus (Copenhagen, Bruges, and Wellington) confirms that the success of each destination lies in the combination of their attractions, innovative use of heritage spaces, and opportunities for visitors to connect and interact with the city's creativity that bring the vibrancy and distinctiveness that visitors are looking for.**



State Bird Provisions, San Francisco  
📷: [thebolditalic.com](http://thebolditalic.com)

## **'Pop-up' phenomenon**

Examples of the 'pop-up' phenomenon that is strongly linked to tourism are the 'ruin bars' in derelict buildings in Budapest. In San Francisco, a new program allows businesses to operate in parts of outdoor public spaces.

For restaurants and shops, this means the option to expand onto sidewalks and market squares. In Berlin local authorities are turning the city's large outdoor spaces into open-air venues for clubs and bars to rent.

The opportunities that are strategically important are additional experiences that bring the creative heart of Ballarat to life, attract new markets, and extend length of stay. Investing in Ballarat's creative products and heritage backdrops and developing immersive experiences that connect the two will bring Ballarat as a Creative City destination to life and make it a compelling destination for travellers.



Biking in Copenhagen  
📷: [visitcopenhagen.com/biking](http://visitcopenhagen.com/biking)

## **Sustainably designed**

It is proven that simple design stands the test of time. And nowhere is that more evident than in urban mobility where the bicycle continues to be the most efficient, practical, and reliable solution to mobility in cities.

Globally cities are building infrastructure and expanding facilities to accommodate the bicycle and the ability to hire bikes as an everyday mode of transportation while improving urban liveability. Copenhagen is considered the most bike-friendly city in the world.

## Global Inspiration



*Plus One Berlin*  
📷: [we-heart.com](http://we-heart.com)

### **Plus One Berlin**

Plus One Berlin gives you a stylish, ecological apartment to stay in 'Kreuzkölln', an exciting and non-touristy neighbourhood of Berlin, and the opportunity to be the 'plus one' of a well-connected and knowledgeable local of your choice.

As their 'plus one' you're given a one-of-a-kind insight in to Berlin life and can discover a side to the city that only locals see. You can take your pick from over 30 locals and choose when you want to hang out with them and for how long.



*London Art project*  
📷: [kingscross.co.uk/the-outside-art-project](http://kingscross.co.uk/the-outside-art-project)

### **Outside Art Project**

Good examples of successful mixing of creative enterprises and creative participation by the local community is [Westergasfabriek in Amsterdam](#) and the Outside Art Project in London.

London's Outside Art Project is a permanent outdoor gallery. The 26-acre space is made up of 15 movable displays featuring the work of acclaimed photographers and visual artists with benches and seating available throughout. In the future, they plan to collaborate with cultural organisations across the UK and other countries to host a rotating roster of exhibitions and events.

# Core attribute pillars

**Ballarat's unique point of difference as a destination is defined by the intersection of two overarching attribute pillars. These pillars are at the root of our identity and act as anchor points for the types of product and experiences we offer.**

## **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.

The intersection of Ballarat's unique attributes has created an aspirational and unique selling proposition for Ballarat. It's our spirited and creative attitude to our future, matched with our maturity to examine our past.

## **Ballarat's unique selling proposition**

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



Artist: Koji Hoashi   taracmoorephotography

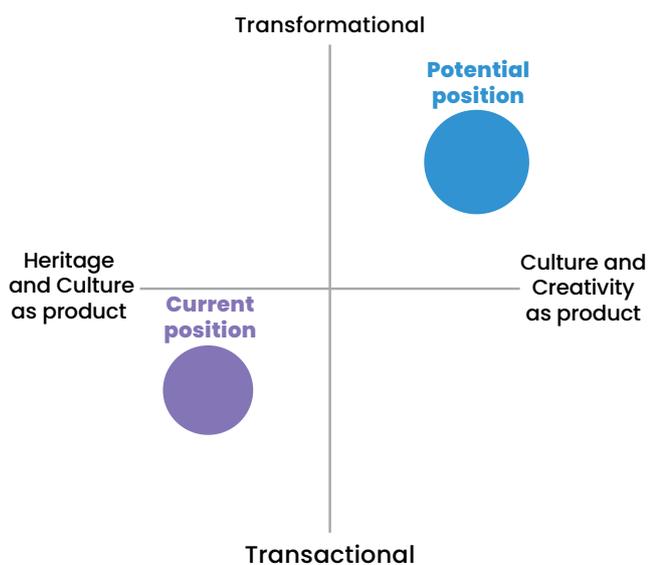
# Challenge the status quo

**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 the 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 heritage and cultural experiences to more transformational and inspirational experiences as detailed in the diagram below.

## **Positioning**



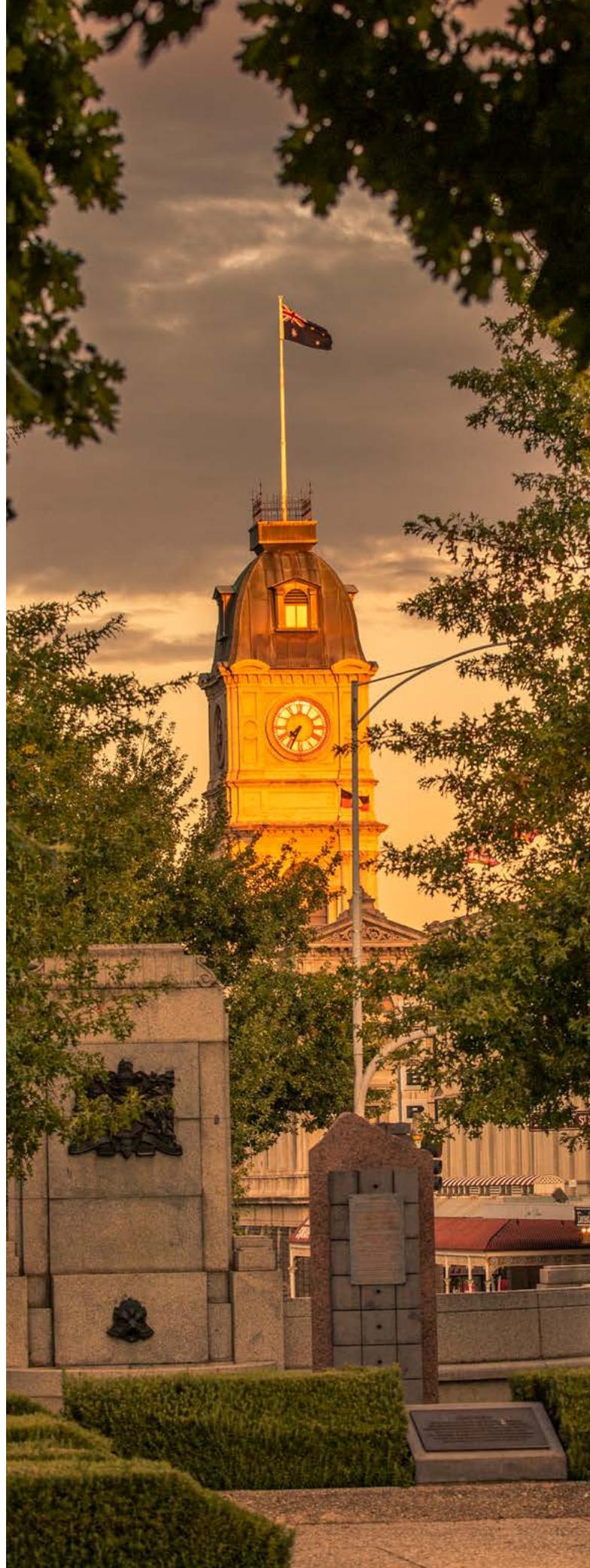
Federation University students performing at the Begonia Festival, 2019  
📷: @chip\_shots

# Experience gaps

**A supply-side assessment of Ballarat's tourism product indicates the region has a diverse range of quality tourism products; however, they are not brand aligned nor sufficiently distinguishable from other goldfield/heritage destinations in the region.**

The following gaps have been identified:

- Attractions with limited opportunity for active participation
- Limited opportunity for experiential creativity and artistic immersion
- Underutilised heritage spaces
- Lack of night-time economy to create cultural vibrancy
- Limited indigenous product to complement the heritage story
- Limited product to support the region's cycling opportunities
- Limited activity directly targeted sporting events
- Lack of packaging to support Ballarat as a region to explore
- Creative experiences are hard to find
- Connectivity, formal and informal tours within city
- Lack of connected and lively precincts
- Leverage the latest in digital innovations to improve visitor servicing and develop new enriching experiences
- World Heritage Bid and commitment to a Dark Sky Community
- Local ambassadors to assist in the promotion of product and experiences.
- The development of new major attractions, and reinvestment into existing product
- Limited all-weather and family-friendly product



chip\_shots

# The way forward

Ballarat's unique point of difference as a destination is defined by the intersection of two overarching attribute pillars.

These pillars are at the root of our identity and act as anchor points for the types of product and experiences we offer. The pillars are key drivers for our events calendar.

**① Contemporary Heritage**

**② Cultural and Creative**



# 1

## Contemporary heritage

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

### **Opportunities**

- Reinvent civic heritage spaces through events, creative clusters, art, and food and drink experiences
- Support the vision and strategic plan for the Eureka Centre and continue to align it to the core experience pillar of Modern Heritage and story of the city.
- Invest in new contemporary attractions
- Encourage new and revitalised accommodation offering
- Connect heritage attractions with improved walking and cycling routes and signposting, touring routes and technology
- Embed and showcase sustainable projects and infrastructure in key visitor precincts throughout the city
- Explore the use of technology to animate the stories of those who have lived or passed through this region over its long history - Wadawurrung peoples, Chinese, immigrant and others - as well as the stories of Ballarat's past and present residents
- Activate the Night Economy by curating using lighting throughout the city supported by evening opening of museums, cultural facilities, education classes, restaurants bars and music
- Creatively leverage the events calendar
- Resource the execution of the Events Strategy to realise its vision of events becoming a prominent driver of being an innovative, inspiring, caring, and courageous city
- Partner with Federation University to leverage the extensive footprint of buildings and leading-edge expertise providing a suite of new opportunities for learning, innovation, and trades



*Benny Mitchell*

## 2

# Cultural and creative

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

### **Opportunities**

- Revitalise Ballarat's CBD experience to connect visitors to the city's 'creative' heart that integrates culture, art, hospitality and creativity into public spaces, way finding, mapping, and transit systems and night economy activation
- Support the expanded footprint Ballarat Regional Art Gallery to provide a new state-of-the-art facility
- Support Sovereign Hill's new Masterplan and investment into the new Centre for Rare Arts and Forgotten Trades (CRAFT) leading the way for further opportunities to solidify our role as Victoria's creative capital
- Develop the new best in class attractions with modern state of the art technology
- Support in creative spaces/enclaves populated by cultural creatives with vibrant atmosphere – music, food, artistic immersion
- Support outdoor art, creative, artistic, hospitality literary trails and storytelling infused with heritage
- Highlight opportunities to improve the public infrastructure required to maintain, support, and improve the existing live music culture in Ballarat
- Support Ballarat's reputation as the home of photography with a world class centre for the art of photography
- Develop indigenous tourism product and interpretative signage, storytelling.
- Explore opportunities to share community assets and profile sustainability themes, cultural tourism and 'local hood' through activities, community gardens and community cultural events
- Ballarat's role and advocacy for Goldfields World Heritage Bid to obtain the benefits it would bring to the broader region.



📷: [mattdunnphoto](#)

# Key attributes

The key attributes can add value by building on Ballarat's uniqueness in a way that is authentic and tangible.

- Food and drink
- Sporting and active
- Accessible facilities
- Accommodation
- Greater Region
- Touring Routes
- Retail
- Nature
- Events



 [mitchell\\_harris](#)

## Key attributes



### **Food and drink**

Our culinary creations are part of our creative cultural offering. Food and drink including locally produced wine and craft beer are increasingly important to visitors, and form an integral part of their visit to Ballarat. There are several breweries and distilleries offering handcrafted beer, cider, gin and whiskey and Ballarat is the home of the Australia Craft Beer Centre of Excellence.

#### **Opportunities:**

- The city's architectural spaces, buildings and laneways create unique spaces for culinary experiences
- Hands-on classes available daily from experienced artisans
- Itineraries to connect regional producers and farm gates with the Ballarat food and drink experience
- Increase the profile of the Pyrenees Wineries, artisan producers, distillers and brewers and exploring the region through food and drink experiences a key driver of travel intention for targeted audiences
- Clarify brand positioning for Ballarat as a craft beer destination so future product development and promotional activities reflect a consistent messaging.



### **Sporting and active**

Ballarat is known as a regional capital for major sporting events with high quality infrastructure. There are several major golf courses in the region, two of which are classified within the top 100 Australian Public Access courses.

Ballarat has a wide range of trails and facilities tailored to different types of cycling. The region hosts an extensive variety of large and small cycling events including Cycling Australia's Gran Fondo Road Nationals.

#### **Opportunities:**

- Promote Ballarat's sporting participation and spectator events that have the greatest potential to increase visitor demand
- Partner with industry to nimbly respond to sporting opportunities when they arise
- Explore the opportunity for a dedicated Sports Museum centrally located in Ballarat
- Invest in new and existing sporting infrastructure with emphasis on accessibility
- Continue to develop and promote Ballarat's trail network through the implementation of the Ballarat Cycle Action Plan, Visit Ballarat Cycle Sector Plan (2018)
- Develop a bike-friendly program positioning the region as a biking hub

## Key attributes



### **Accessible facilities**

Ballarat offers a high level of accessible facilities including accommodation, cafes, and restaurants, play spaces, gardens, attractions, and sporting and recreational facilities with capacity that cannot be matched by most regional destinations.

#### **Opportunities:**

- Develop online material that includes digital assets, infographics and fact sheets on facilities and access to help visitors of all backgrounds travel independently and confidently



### **Accommodation**

Our accommodation offerings have a significant impact on the region's capacity to attract visitors. There are currently around 90 accommodation businesses offering approximately 1,800 rooms which encompass a broad spectrum of styles and standards.

#### **Opportunities:**

- The city's architectural legacy is perfect for heritage accommodation while also catering to market expectations for contemporary comfort
- Identifying and addressing our current accommodation gaps to meet our priority market segments needs and expectations.

## Key attributes



### **Greater Region**

Ballarat acts as a tourism hub in the context of the broader region. Within 45 minutes of Ballarat many of the villages provide a layer of product which can add to Ballarat's appeal such as spa, food, wine, and nature-based attractions. Pyrenees, Clunes, Creswick, Avoca, and the Grampians

#### **Opportunities:**

- The layer of product found in proximity to Ballarat strengthens its position as a hub for tourism with strong potential for leverage
- Due to current closure of Victorian State borders there is an increase in the touring and drive market



### **Touring Routes**

The Great Southern Touring Route is a major touring product for Ballarat, particularly due to it being a focus for international marketing of the region. The Great Southern Touring Route includes a range of prominent Victorian destinations as well as Ballarat, such as the Great Ocean Road, The Grampians, and the Spa Country.

#### **Opportunities:**

- The Ballarat region has more reliance on short break overnight travel which is expected to bounce back better than extended domestic trips.
- Advocacy for existing touring route models to become more agile and versatile with a focus to relevant domestic markets for the short to medium term. I.e. Great Southern Touring Route.

## Key attributes



### **Retail**

The city has a wide range of smaller, boutique, owner-operated stores which feature clothing, gifts, health and beauty products, jewellery, vintage goods, and other items with strong visitor appeal. Ballarat has three markets which provide additional diversity to the retail offering.

#### **Opportunities:**

- The opportunity to curate itineraries of independent retailers will be attractive to new priority markets who like to alternate their fast-paced tech way of living to return to the past ie vintage and second-hand shops
- Opportunities to create opportunities for local producers to profile their product in existing venues or create additional markets and pop-up venues to profile locally made products



### **Events**

Events play a significant role in showcasing Ballarat, stimulating tourism demand, increasing expenditure, and positioning the City as an exciting visitor destination. The impact of events will be heavily dependent on our ability to better leverage and reimagine what we currently have. Supplementing that, we will look to acquire and develop new events that align with our natural strengths as a destination.

#### **Opportunities:**

- Create a year round events calendar that:
  - Delivers on the key pillars and attributes identified in the TEP
  - Supports low occupancy periods including mid week ie Business events
  - Appeals to priority audiences
- Share our Compelling Narratives of our city and its people through events. e.g. The Eureka Story, Chinese Heritage, The Wathaurong People, Sustainability
- Develop a major signature arts/cultural festival for Ballarat which builds on the region's creative strengths
- Partner with industry to nimbly respond to opportunities when they arise

## Key attributes



### **Nature and sustainability**

Cycling and walking trails make up a large component of the nature-based tourism opportunities within Ballarat. Lake Wendouree, Lake Learmonth, and Lake Burrumbeet are widely used as a recreational facility for both residents and visitors to the city.

#### **Opportunities:**

- Develop online material on gardens and nature-based activities
- Build and share content on the sustainability narrative to be threaded through communications across all stakeholders. Examples wind energy, education piece. McCain 40-hectare solar farm.
- Encourage more dedicated activities available on Lake Wendouree, Lake Burrumbeet, Lake Learmonth

# 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 2 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.

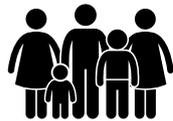
They are mainly from New Zealand and Asia, followed by United Kingdom and Europe.

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

The average expenditure per night is \$66.

# Ballarat's visitor economy 2019\*

\*Source: Tourism Research Australia, NVS and IVS, December 2019



**Total visitors**  
**3.4 MILLION**  
**44% INCREASE**

Since 2014



**Total visitors expenditure**  
**\$613 MILLION**  
**58% INCREASE**

Since 2014



**Domestic day trippers**

**2.3**  
 Million



**Domestic overnight visitors**

**992,000**  
 Thousand



**International visitors**

**29,000**  
 Thousand

**International source markets**

NEW ZEALAND, ASIA, UK, EUROPE

**Domestic source markets**

REGIONAL VICTORIA AND MELBOURNE

# Ballarat's visitor economy 2019



## Purpose of visit



### Domestic day trippers

**36.4%**

Visiting friends  
and relatives

**34.7%**

Holiday

**18%**

Business



### Domestic overnight visitors

**42.9%**

Visiting friends  
and relatives

**41.9%**

Holiday

**15.2%**

Business



## Total visitor nights

**2.6 MILLION**  
**70% INCREASE**

Since 2014

**529,000**

Thousand

**2**

Million

## Total employment

**3,000 JOBS = 6.2%**

OF TOTAL EMPLOYMENT

## Market share of Victorian Regional Tourism

**5.4% DOWN FROM 5.6%**

IN 2014

# Tourism performance

**Ballarat is the fourth most popular regional destination in Victoria receiving a record 3.4 million visits and 2.6 million visitor nights in 2019 (December YE).**

**70%**

**of visits to Ballarat  
domestic day trippers**

**29%**

**domestic overnight  
visitors**

**1%**

**international visitors**

While day trippers are an important sector, visitor spend data demonstrates that the domestic and international overnight visitor markets are far higher yielding and, while only Domestic and International overnight visitors represent 31% of total visitation generate 56% of all spend.

Domestic overnight market is 80% of overnight visits compared to the International overnight market of 20%

Capturing the international market is challenging for Ballarat because of the strong competition from other Victorian iconic attractions, including Phillip Island and the Great Ocean Road. While the potential for growth does exist in the international overnight market, the domestic overnight market presents the greatest opportunity for Ballarat.

Adjacent regions such as Bendigo will continue to compete for this market, which means Ballarat will need to invest in its visitor economy to retain and grow its market share. Attracting both markets will require enhancements to products, and infrastructure built in past decades which may need renewal or updating to provide a more compelling experience for both domestic and international markets in an increasingly competitive environment.



*The Provincial*

# Our market share

**Ballarat's market share of visitors has fluctuated between 5.5% and 6% over the last ten years, reaching its lowest point in 2018 (5.3%). Geelong receives around 10.4% of all domestic visitors to regional Victoria and Bendigo around 7.7%.**

## **Cultural visitation**

Over the last ten years Ballarat has experienced strong growth in the cultural tourism sector. Ballarat attracted 12% of domestic day trippers, 8% of domestic overnight visitors and 4% of international visitors in 2019. Its competitors in this sector are Phillip Island, Bendigo, and Geelong.

## **Food and drink visitation**

Visitors to Victoria participating in food and wine tourism activities have more than doubled in the last ten years. Compared to other Victorian regional destinations, Ballarat holds the smallest market share of the domestic overnight food and wine market (2%). Phillip Island (23%) and the High Country – Murray East (22%).

## **Nature based visitation**

Over the past ten years there has been a slight increase in the participation of nature-based related activity in Ballarat. When compared to other destinations in regional Victoria, Ballarat holds a very small share of the nature-based tourism market (3% of the domestic overnight market).

## **Business travel**

In the last three years the number of domestic visitors travelling for the main purpose of business increased by 36%.

*Source: All data in this section is sourced from NVS, IVS Tourism Research Australia.*



 [teaganglenane](#)

# Drivers of domestic travel to Ballarat

**Tourism Research Australia provides statistics and research on both international and domestic tourism for all regions including Ballarat. The research, analysis and data assists government, tourism industry and other businesses to make informed planning, marketing, and investment decisions.**

**42.9%**

## **Visiting friends and relatives**

The Visiting Friends and Relatives market (VFR) are a significant market for Ballarat. The highest yield or greatest growth opportunity within the VFR sector are affluent, frequent, younger travellers and new Australians. If targeted effectively, the domestic VFR market represents a significant opportunity to stimulate the local visitor economy. Ballarat has slightly above regional average levels of VFR travel in domestic visitor nights.

**41.9%**

## **Domestic leisure markets**

The market predominantly capitalizes on recreational activities such as entertainment, travel and accommodation, sports, betting and gaming, eating and drinking, and cultural activities.

**15.2%**

## **Corporate and business travel**

In the last three years the number of domestic visitors travelling for the main purpose of business increased by 36% from 122,000 visits in 2017 to 166,000 in 2019. The number of domestic visitor nights increased by 17% from 269,000 to 314,000 over the same period.

*Source: All data in this section is sourced from NVS, IVS Tourism Research Australia.*



📷: [teaganglenane](#)

# Overarching destination marketing recommendations

## **Start at the basics by challenging the fundamental misconception that Ballarat is not a tourism destination**

The City of Ballarat must reinforce the most fundamental destination brand elements; that Ballarat is a getaway, has surprises in store, has a 'holiday feel' etc. are all essential to opening the door to consideration.

## **Promise breadth of opportunity**

There's no single attraction, or even combination of attractions, which on their own merits convert mainstream visitation. The solution is for audiences to implicitly believe they'll find what they need to compile a great trip when they get there. By all audiences, the Visit Ballarat website is evaluated as an excellent resource to achieve this – and driving more traffic towards it is implicit to converting consideration to visitation.

## **Promote Ballarat's established scene of authentic and down-to-earth producers**

Exploring regions through food and drink experiences is a key driver of travel intention for all audiences. Being a heritage regional centre, the link between Ballarat and artisan produce is intuitive. Creating intrigue through food / drink is an effective way to prompt a more thorough investigation of Ballarat as a place to visit, ties in with Ballarat's broader cultural offering, and challenges misconceptions of Ballarat as a 'characterless' regional town.

## **Promote shareable, picturesque moments which convey a getaway**

For all audiences, this style of communication is a short-cut to convey newness, liveliness, and escape, addressing Ballarat's key barriers in doing so. For primary target segments in particular, full trips start from an initial source of inspiration, often through word of mouth, an image or simple description shared via. social media.

## **Weave nature into the brand story**

It is a major impediment that Ballarat is not perceived to deliver any kind of nature experience. Perhaps exacerbated under COVID conditions, all audiences expect fresh air/walk/sightseeing outdoors as a part of their travel, even when that travel is centred around an urbanised or indoor activity.

*Source: City of Ballarat Tourism Segmentation Quantum Research Feb 2021*

# Priority visitor audiences for Ballarat

**The overarching goal of this audience research is to provide the City of Ballarat with a clear and reliable profile of the current and potential future visitor base, their motivations and visitation behaviours, as well as an understanding of perceptions and attitudes toward Ballarat's existing and prospective future visitor offering.**

Active Regional Explorers and Regional Fledgling segments are 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 segments 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/think Ballarat is right for them. However, this is a positioning issue which can be addressed since Ballarat offers most of what they look for.

Whilst more challenging to convert to consideration, visitation intensification Ballarat has the assets to attract these audiences.

*Source: City of Ballarat Tourism Segmentation Quantum Research Feb 2021*



chip\_shots

# 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?**

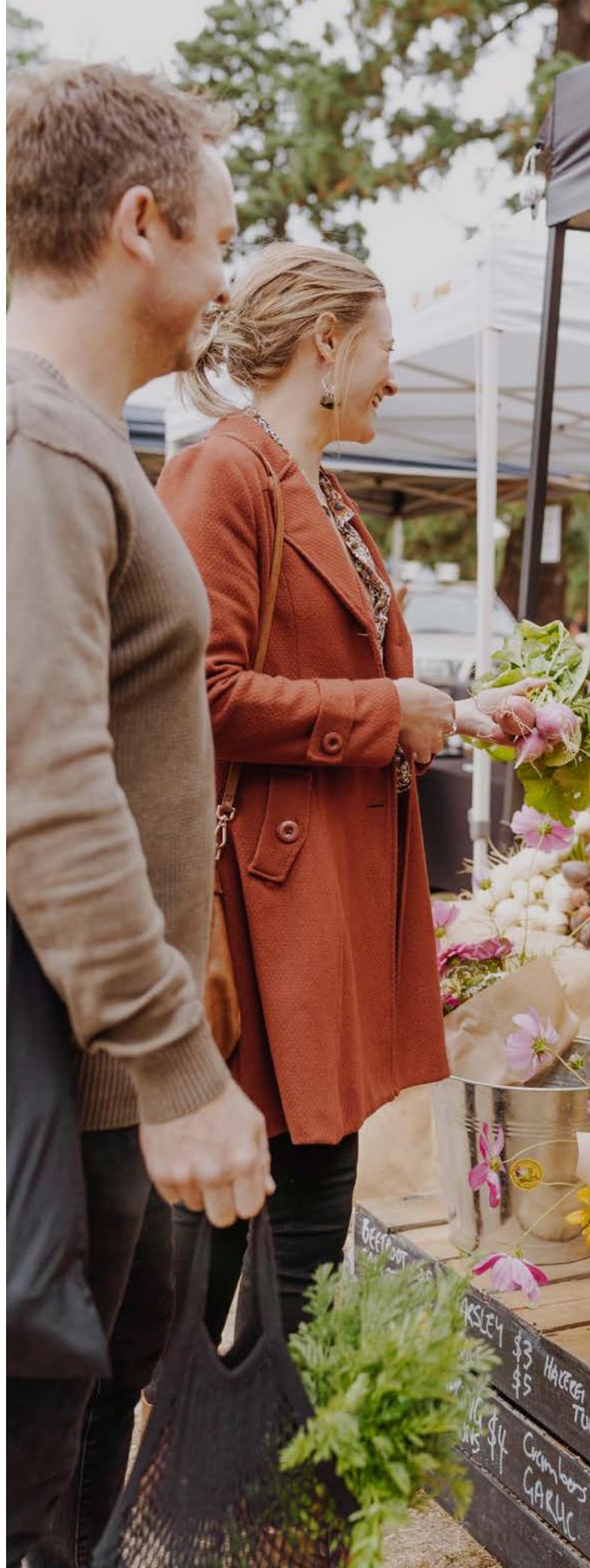
- Value taking it easy and relaxing over a packed itinerary.
- Self-identify as a foodie, make planned dining arrangements, and seek out produce.
- Visitation centred around townships, not nature.

#### **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.



📷: [mattdunnephoto](#)

## 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](#)

# Five Strategic Priorities

The Traveller Experience Plan has five priorities. Implementation of our priorities will occur in partnership with a broad range of organisations. Creating a culture of collaboration within the Ballarat Region with strategic partners, the tourism and hospitality industry, the creative industry, community organisations and all levels of government will be instrumental in achieving our goals.

- 1 Develop and implement a co-designed Visitor Economy Strategy 2021–2024**
- 2 Implement dynamic long-term visitor planning and anchor investment**
- 3 Focus on product development and innovation**
- 4 Research driven cooperative marketing plan**
- 5 Facilitate community tourism**

### 1

## **Develop and implement a co-designed Visitor Economy Strategy**

The *Visitor Economy Strategy 2021-2024*, will focus actions and partnership with industry to achieve following:

- Increasing overnight visitation to the region and extending the average length of stay as these will deliver higher economic benefits (including local jobs and investment) than the day tripper market
- Converting the high volume of day trippers to overnight visitors and;
- Leveraging Ballarat's strong visiting friends and family market

We will build an overarching plan co-designed with industry that includes:

- Strategic Vision, resourcing, and action plans
- Strategic partners
- Data led with regional tourism data and measured performance
- Prioritisation and promotion of tourism infrastructure and product development projects that support the Traveller Experience Plan
- Implement visitor service excellence education and training programs

### 2

## **Implement dynamic long-term visitor planning and anchor investment**

We will actively build on the master planning and pursue investment in both public and private infrastructure including iconic attractions, civic amenities, visitor services, connectivity, transport connections, to support growth in the visitor economy. We will focus on:

- Build on the Creative Cities Masterplan to support the fundamentals of the *Traveller Experience Plan 2021–2030* that will support a broad program of activities, showcasing the city's assets and expressing the creative energy of its community
- Leverage the Railway precinct vision to create a public space at the doorstep to the city that can be used for events, gatherings, visitor information and a gateway to visitors and the community
- Develop a set of attributes that will assist in decision making of Catalyst Projects for business case development, funding, and delivery of infrastructure that supports growth of the visitor economy
- Scale up the level of investment in iconic visitor attractions and supporting infrastructure
- Facilitate opportunities for investment and innovative models of funding and delivery via multiple funding streams, including public private partnerships
- Embedding visitor economy considerations within all infrastructure projects

3

### **Focus on product development and innovation**

We will focus on attracting investment on the key experiences that prioritise the core attributes. We will:

- Develop an action plan to prioritise the identified product opportunities in the *Traveller Experience Plan 2021–2030* that match priority segments
- Develop integrated experiences, tours, and itineraries through our different enterprises (food, retail, creative, sport and heritage)
- Prepare a Traveller Signage and Interpretation Strategy to support storytelling and interpretation, wayfinding, and a consistency throughout the region
- Prepare a Night-time economy activation Plan for Ballarat

4

### **Research driven cooperative marketing plan**

The strategic marketing plan will apply a research driven approach to identify and segment target markets to match supply and demand. We will:

- Develop a strategic marketing plan that identifies the segment target markets to match supply and demand
- Invest in marketing to underpin the positioning outlined in the *Traveller Experience Plan 2021–2030*
- Establish cooperative marketing programs that have measurable goals with results published to participants
- Develop customer journeys for all priority audiences and identify opportunities
- Confirm the long-term brand strategy

5

### **Facilitate community tourism**

Ballarat's greatest asset, and ultimately its competitive advantage, is the creative energy that is generated by our community and the many talented people who choose to live in the region. The community of Ballarat play an integral role in hosting and welcoming visitors. They are the creators of the Ballarat experience for their friends and relatives enabling unique, authentic, and local experiences. While strengthening our efforts to attract more visitors, we increasingly need to do so from a people-based growth perspective: growing not only to increase the number of visitors, but also to expand the value of visitors to our community. At the core of this plan is the need to support our residents as hosts and experience entrepreneurs for our visitors.

We will:

- Recognise that residents, whether hosting visiting friends and family or meeting a visitor on the street, play a key role as ambassadors of the Ballarat experience
- Utilise the City's vast communication channels and onsite locations to promote activities, events, and happenings
- Build on the intercultural community status expressed through community events and programming
- Enable shareable moments between locals and visitors through relevant initiatives
- Partner with the Wadawurrung and Dja Dja Wurrung peoples to support their aspirations for tourism enterprise
- Inspire the local community and industry to mobilise together and deliver on the vision, in this plan and build the industry's resilience and agility
- Deliver a high quality, personalised and customised services, tailored to the individual visitor's needs
- Explore digital or downloadable itineraries which clearly detail and defines walks, rides, and points of significance

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 the 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 and active participation. This will set us apart from other regional destinations in Victoria.



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