Pyrenees Shire Council

Tourism Midwest Victoria

2024 – 2033
Local Area Action Plan

Acknowledgement of Country

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

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

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

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

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Part 1: Executive Summary

Pyrenees Shire is nestled within the picturesque landscapes of western Victoria and is characterised by serene natural beauty, award-winning vineyards, and a rich historical tapestry. The Shire is situated approximately 158 kilometres northwest of Melbourne and has a population of over 7,600 residents.

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

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

This LAAP focuses on PSC-specific recommendations to help guide the Shire's visitor economy over the next ten years and reflects the needs of the community, industry, and Council.

Our current visitor snapshot

In 2023, the Shire attracted 223,000 visitors who collectively injected over $37 million into the Shire's economy.

Despite grappling with the effects of the COVID-19 pandemic, the Shire has demonstrated resilience. Visitation in 2023 exceeded pre-pandemic levels, driven by a domestic visitor market actively seeking an accessible regional destination.

Figure 1: Visitor profile snapshot 2023[1]

223,000

Trips in 2023

68% domestic day trip
31% domestic overnight
0.2% international overnight

$37.1 m

Spend in 2023

27% domestic day trip
72% domestic overnight
0.4% international overnight

4.0 nights

Average Length of Stay

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[1] September YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Our visitor economy in 2033

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

Table 1: PSC forecasts[2]

Total spending in the Shire is forecast to reach $72.6 million by 2033

Visitor spending in the region is projected to be 95% above the pre-pandemic level by 2033, generating an additional $35.4 million in spend (up from $37.2 million in 2019).

Total spending in the Shire has already surpassed pre-pandemic levels due to a combination of latent demand for travel and inflationary pressures.

Total visitors to the Shire are projected to reach 320,000 by 2033, up from 223,000 in 2023[3]

Growth to the Shire is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 212,000 domestic day trip visitors and 108,000 domestic overnight visitors expected in 2033.

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

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

Our strategic framework

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

Table 2: Strategic framework guiding the Sustainable Destination Management Plan

Victoria. *Every bit different.*

Statewide brand guiding marketing and product development

Experience Victoria 2033
Statewide tourism strategy for Victoria

Product Priorities

- Arts and Culture
- First Peoples
- Food and Drink
- Nature
- Wellness
- 10 key settings[1]

Tourism Midwest Victoria Sustainable Destination Management Plan

Product Pillars

- Creative Energy
- First Peoples
- Nature at your Fingertips
- People and Place
- Signature Experiences

Tourism Midwest Victoria Local Area Action Plans

- City of Ballarat Local Area Action Plan
- Moorabool Shire Local Area Action Plan
- Pyrenees Shire Local Area Action Plan
- Golden Plains North Local Area Action Plan
- Western Hepburn Local Area Action Plan

Our plan on a page

This Pyrenees Shire LAAP aligns closely with the Tourism Midwest Victoria's SDMP's strategic framework (see Figure 2). The targets identified are for the Shire specifically.

Figure 2: Our plan on a page

OUR VISION

Brilliantly Unexpected
Wonderful, welcoming with just the right amount of quirk, Midwest Victoria as a place to visit reflects the region's diversity, culture, history and creativity. Nestled in a natural landscape that underpins what the region offers to the visitor. easily accessible beautiful nature that produces

OUR VALUES

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

PILLARS

• First Peoples
• People and Place
• Creative Energy
• Nature at your fingertips
• Signature experiences

OUR WAY OF WORKING

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

SOCIAL AND ECONOMIC IMPACT

MEASURING THE VALUE OF THE VISITOR ECONOMY

Tier 1 targets – 2033		Tier 2 targets – 2033			
320k	$72.6m	0.51 : 1	4.8	$227	110
visitors	in visitor expenditure	the ratio of overnight to day visitors	average length of stay (nights)	spend per visitor	direct visitor economy jobs

● **What we strive for**

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

Priority local projects

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

Table 3: The priority strategic initiatives

	Destination branding exercise	Support cycling activity in Beaufort, Avoca, and Moonambel	Upgrades to Beaufort Lake Caravan Park and Avoca and Landsborough Caravan Parks
Type	Demand initiative	Supply-side product	Supply-side product
Rationale	Undertake a destination branding exercise for the Shire to grow a much clearer destination awareness. Feedback received indicates that currently, the visitor market struggles to understand the value and brand proposition of the Shire. The brand work should be developed by a professional destination brand developer with strong industry involvement to help ensure buy-in. At this stage, a logical focus for the branding would be the Shire's food and drink product along with its nature/recreational product.	The Shire's stunning environment provides the opportunity to support increased nature-based activities through the development and enhancement of trails, aligning seamlessly with its natural environment. Opportunities could include ▪ Gravel cycle product linking to wineries and points of scenic and historic interest. ▪ Investigate the natural extension of the Avoca to Moonambel trail and capitalise on gravel tracks around Beaufort. ▪ Undertaking general maintenance and trail enhancement works. ▪ Developing a comprehensive trail brochure for the Shire to better promote trails. ▪ The potential to link in more closely with broader regional trails such as those being developed in Western Hepburn.	Beaufort Lake Caravan Park: Continue to support the upgrade of Beaufort Lake Caravan Park including the addition of 11 powered sites; 1 unpowered site; 8 annual/permanent sites and 13 cabins. Avoca and Landsborough Caravan Parks: The opportunity also exists to leverage Avoca and Landsborough Caravan Parks and undertake an expansion of these parks to cater to a larger number of visitors and a more diverse visitor profile as well as the potential to offer worker accommodation. The potential also exists to undertake discussions with commercial destination holiday park operators to gauge interest in the development or upgrade of an existing caravan park in the Shire.
Actions	1. Undertake regional audience segmentation research 2. Develop a sub-destination positioning framework 3. Commission a digital asset library 4. Develop an annual strategic marketing plan	5. Undertake audit of the Shire's cycling trails 6. Investigate areas of maintenance needs on the existing network 7. Explore the extension of the Avoca to Moonambel trail 8. Investigate opportunities to link into the broader regional trail network 9. Develop a digital map that profiles the Shire's trail network.	Beaufort Lake Caravan Park: 1. Complete upgrades of accommodation units and supporting infrastructure. 2. Promote upgraded and extended facilities. Avoca and Landsborough Caravan Parks: 1. Determine upgrades required for both caravan parks. 2. Determine timing for upgrades and if staged. 3. Investigate private sector interest in introducing a branded destination holiday park operator at Avoca/Landsborough

	Boutique Accommodation	Centralised cellar door experience	Avoca and Beaufort streetscape enhancements
Type	Supply-side product	Supply-side product	Supply-side product
Rationale	There is a shortage of commercial accommodation options within the Shire. This results in visitors typically undertaking day trips only to these areas and economic leakage occurring. There is a need to investigate introducing accommodation that is of a size and scale that would be appropriate to these areas to generate a greater uplift from the visitor economy. For Avoca and Beaufort, destination-style accommodation could be considered. This could include farmstays, eco-pods, tiny cabins, and glamping.	The Pyrenees wine area is only a two-hour drive from Melbourne. The wine region is known for its superb wines and distinct microclimate. While the Shire's wine offering is growing, it struggles at times to compete with other larger wine regions because of a lack of visible presence. To help overcome this, the potential exists to develop a wine and produce showcase centre within the Pyrenees. This could: feature the Shire's vineyards; offer a shopfront for the vineyards; and potentially on a rotating basis, offer tastings.	Look to enhance the town streetscapes via beautification and activation plans, leveraging the Pyrenees Futures Project, to create a more inviting and enjoyable environment for locals and visitors. These plans should look at the potential to include landscaping, adding pedestrian-friendly features like walkways and benches, installing decorative lighting, improving signage, upgrading wayfinding, and revitalising historic buildings or landmarks.
Actions	1. Investigate options for types of accommodation development and locations. 2. Work with industry operators and investors on supporting locations.	1. Feasibility to create a centralised cellar door/winery centre. 2. Assess existing building options in Moonambel and Avoca as potential sites (including possibly the Albion as a shop frontage) 3. If viable, develop a concept and detailed design. 4. Create the facility as a visitor wine and food-related attraction, possibly co-located with a visitor centre.	1. Undertake a beautification and activation plan for both towns 2. Identify additional grant funding streams to activate and support the plans 3. Develop a prioritisation program and gain the support of local business owners and operators.

Part 2: Introduction

Overview and process for developing our plan

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

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

Preparing our plan

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

Figure 3: Local Area Action Plan Methodology

01 Initial Research	03 Consultation	05 Survey	07 Additional Consultation	09 Review of Draft LAAP
Ongoing desktop research and a comprehensive literature review.	Workshops with industry and other relevant stakeholders.	Community and industry visitor economy survey.	Additional workshops with industry and other relevant stakeholders.	Reivew of the draft LAAP by Councils and refinements required.

02 Situation Analysis	04 Data Analysis	06 Audit & Sentiment Assessment	08 Draft LAAP Development	10 Finalisation of the LAAP
Situation analysis of what exists now and why.	Visitor economy assessment (including historic visitation and spending data).	Tourism product audit and consumer sentiment assessment.	Development of the draft LAAP document.	Integration of feedback and delivery of the final LAAP.

A collaborative approach

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

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

Table 4 provides a summary of those consulted.

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

Table 4: Consultation summary

Tourism industry – A series of industry and community workshops were held in each local government area throughout the project. Approximately 150 industry representatives and community members were met with. Industry representatives came from a broad mix of sectors, including accommodation, attraction, hospitality and transport.

Government agencies – These included Visit Victoria, Regional Development Victoria, Parks Victoria and the Department of Jobs, Skills, Industry and Regions.

Community – A community survey was developed, with 201 responses received across the Tourism Midwest Victoria region and 52 for the Shire itself. The findings of the survey are included in Appendix 1.

Local government authorities - These included CEOs, Councillors and members of executive leadership teams. Workshops were also held in each local government area, with staff from various departments in attendance.

First Peoples – Barengi Gadjin Land Council, Wadawurrung Traditional Owners Aboriginal Corporation, Dja Dja Wurrung Clans Aboriginal Corporation and Eastern Marr Aboriginal Corporation were consulted.

Investors and developers - One-on-one meetings and interviews with developers and investors.

Other RTBs/VEPs – These included Bendigo Regional Tourism and Grampians Tourism.

Phrases and concepts to know

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

Table 5: Terms to know

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

About the Tourism Midwest Victoria region

Geography

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

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

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

Figure 4: SDMP scope

KEY

- City of Ballarat
- Golden Plains – North
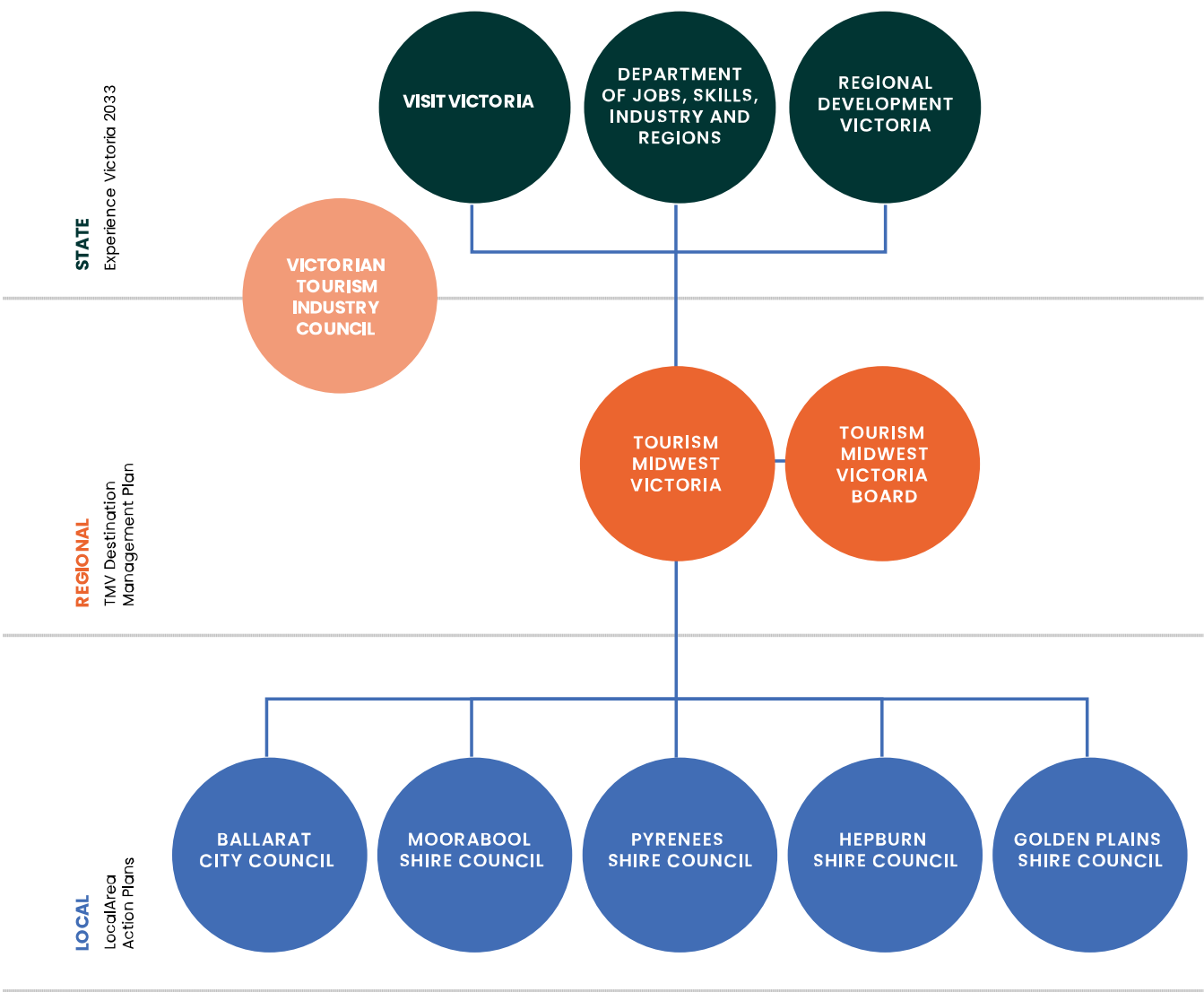- Moorabool Shire
- Pyrenees Shire
- Western Hepburn

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

Governance

Figure 5: Tourism governance summary

Roles and responsibilities

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

Table 6: Roles and responsibilities

Stakeholder	About	Key roles/responsibilities
Visit Victoria	Visit Victoria is the state's official tourism and events agency. Visit Victoria plays a crucial role in promoting the state as a premier tourism destination and driving economic growth through tourism-related activities.	• Destination marketing. • Guiding regional positioning and development. • Supporting industry development. • Event attraction and support. • Developing collaboration and partnerships to support tourism development. • Distributing research and insights. • Promoting and implementing sustainable tourism practices.
Department of Jobs, Skills, Industry and Regions	The Department of Jobs, Skills, Industry and Regions (DJSIR) is focused on growing Victoria's prosperity and building the productive capacity of the state's economy and increasing participation. This is done by creating more opportunities for people through skills and jobs; helping businesses and industries to thrive; and building vibrant communities and regions. DJSIR works closely with Visit Victoria. Tourism and events is one of DJSIR's areas of focus. Within this, it is responsible for strengthening the profile of the visitor economy across government and influencing strategic reforms and economic outcomes for the sector.	• Undertaking research. • Providing policy, strategy and industry development advice to the Victorian Government and industry on the visitor economy. • Providing governance support and advice to several entities that market the state and secure events. • Managing large-scale tourist attractions, precincts, facilities and entertainment venues in Victoria.
Regional Development Victoria	Regional Development Victoria (RDV) is responsible for supporting and facilitating economic and social development in regional areas of Victoria.	• Managing funding streams and grant programs such as the Regional Tourism Investment Fund. • Business investment. • Industry support. • Advocacy.
Victorian Tourism Industry Council	The Victorian Tourism Industry Council (VTIC) is an industry association that represents the interests of the state's tourism operators and businesses.	• Industry advocacy. • Policy development (at a state and national level). • Industry support and development. • Networking and collaboration. • Education and training. • The provision of research data and insights.
Tourism Midwest Victoria	Tourism Midwest Victoria (TMV) is the Visitor Economy Partnership which covers the midwestern region of the state. It provides strong leadership and links between communities, all tiers of government and industry. TMV has a skills-based board that comprises of senior local government representatives and industry.	• Destination management planning. • Destination development. • Crisis planning and response management. • Industry support and strengthening. • Advocacy on behalf of industry and local government. • Destination marketing and regional conversion.
Local government	In Victoria, local government plays a key role in supporting the visitor economy. The five local government areas in Midwest Victoria all deliver services that contribute significantly to the development and growth of the region's visitor economy.	• Local tourism promotion and marketing. • Provision of visitor information services, often via visitor information centres. • Development and maintenance of tourism-related infrastructure including facilities such as parks, recreational areas, signage and amenities that enhance the visitor experience. • Event support. • Industry training. • Community engagement to ensure tourism development aligns with community values and aspirations. • In times of crisis, local government often plays a role in coordinating responses and providing support to the tourism industry. • Regulatory functions related to tourism, including land use planning, zoning and permitting for tourism-related developments.

About Victoria's Visitor Economy Partnerships

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

Under this new model, each VEP will:

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

Core responsibilities

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

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

Core benefits

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

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

Key features

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

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

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

About the Tourism Midwest Victoria VEP

Core responsibilities

The work of TMV is divided into three key areas:

Sustainable destination management

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

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

Marketing

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

Advocacy

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

Strategic context

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

Table 7: Strategies of relevance

Strategy	What is it?	How it has been aligned to this LAAP?
Experience Victoria 2033	The Victorian Government's strategic plan to shape the future of Victoria's visitor economy over the next 10 years. Experience Victoria's Product Priorities and Settings are outlined in Appendix 3.	There are several product priorities and settings that have been identified as both current and emerging strengths of the region. These are included in Appendix 3.
Destination Victoria Brand Strategy Playbook	The reference point defining what makes Victoria and its regions different and compelling. The Destination Victoria Brand Strategy playbook (see Appendix 4) was developed as a tool to define Victoria's overarching brand as well as its various sub-regional brands and the strategy behind these. A key objective of the playbook is the ensure the brand messaging for the state and each sub-regional destination is unique and compelling.	This LAAP is aligned with the Destination Victoria Brand Strategy by aligning the themes and product development opportunities in the LAAP with the state's sub-regional brand pillars.
Creative State 2025	Creative State 2025 is an integrated strategy to address longstanding and new challenges facing the creative industries and to grow their contribution to our society, economy and culture. Supported by a four-year budget of $288 million, it is a strategy designed to enrich the lives of all Victorians.	Creative State 2025 builds on Victoria's strengths, tackles pressing and systemic challenges facing creative future collaboration and investment. With Creative Energy and People and Place product pillars of this SDMP, there is alignment through striving to improve equitable access to creative experiences and careers; and investment in new and established innovative creative products and experiences.
Central Highlands Regional Economic Development Strategy (REDS)	Developed by Regional Development Victoria, the REDS identify the strategic directions to further drive growth and prosperity in regional Victoria.	The REDS identifies five strategic directions based on the opportunities emerging from the region's endowments, industry specialisation and socioeconomic context. Of these five, the most pertinent is Strategic Direction – "continue to grow and develop the visitor and creative economies". Critical visitor and creative precincts identified in the REDS and that strongly align with this LAAP include: ▪ The regional city of Ballarat, with its burgeoning creative scene and goldfields heritage, including Sovereign Hill; ▪ The Pyrenees wine region; and ▪ First Nations culture.
National Agritourism Strategy 2030	This strategy provides direction and toolkits for primary industries and producers to diversify and sustain their core business by offering products to visitors. It is a roadmap for farmers to unlock new business opportunities and encourage jobs for regional communities.	The strategy identifies six priorities that underpin the sector's growth. These strategic priorities demonstrate the opportunity for areas within the region to grow their profile as an agritourism destination and support producers to enable agritourism growth. Sustainable and inclusive farm diversification. ▪ Community capability and capacity building with a focus on regional employment. ▪ Develop new, high-quality, distinctly Australian agritourism experiences. ▪ Promote the sector responsibly, with an alignment to food and drink. ▪ Encourage genuine collaboration and partnerships. ▪ Provide sector leadership to support inclusive growth.

About the Pyrenees Shire

The Pyrenees Shire is an LGA situated approximately 200 km northwest of Melbourne (see Figure 6). It is named after the Pyrenees Ranges, a prominent geographical feature in the area. The Shire covers a diverse and picturesque landscape, ranging from fertile valleys to rolling hills and includes several historic towns and communities.

The Shire encompasses several towns and localities, each with its unique character and charm. The major towns within the shire include Beaufort, Avoca, Moonambel, Landsborough, and Amphitheatre. These towns often serve as hubs for various economic, cultural, and social activities within the Shire.

The Shire offers a variety of tourist attractions that cater to a range of interests, from natural beauty and outdoor activities to historical and cultural experiences. Some of the major tourist attractions in the Shire include:

- Pyrenees Ranges: The Shire is home to the Pyrenees Ranges, a series of scenic hills and valleys that offer numerous opportunities for bushwalking, hiking, and exploring the natural beauty of the region. There are walking tracks and lookout points where visitors can enjoy breathtaking views of the landscape.
- Wine Region: The Shire is renowned for its wineries and vineyards. Visitors can tour the many cellar doors, sample award-winning wines, and learn about the winemaking process. Some well-known wineries in the region include Taltarni Vineyards, Blue Pyrenees Estate, and Summerfield Wines.
- Historical Towns: The shire boasts several towns with historical significance, including Beaufort, Avoca, and

Clunes. These towns feature well-preserved historical buildings, museums, and landmarks that provide insight into the Gold Rush era and early Australian history.
- Blue Pyrenees State Park: This state park encompasses the northern section of the Pyrenees Ranges and offers opportunities for bushwalking, picnicking, and enjoying the region's natural flora and fauna. The park is a popular destination for outdoor enthusiasts.
- Other natural assets including the Beeripmo Walk, Mount Cole, Mt Buangor State Park and Ben Major.
- Art and Culture: The region has a small but emerging arts and culture scene, with art galleries and cultural events.
- Mount Lonarch: This prominent hill in the Shire offers panoramic views of the surrounding countryside. It's a popular spot for hiking and taking in the natural beauty of the region.
- Local Markets: The shire hosts a variety of markets throughout the year, including farmers' markets and craft markets, providing an opportunity to purchase local produce and handcrafted goods.
- Annual Festivals: The Shire hosts numerous events and festivals that celebrate the region's wine, food, and culture. Events like the Pyrenees Unearthed Festival and the Avoca Riverside Market draw both locals and tourists.

These attractions collectively offer a diverse range of experiences, from outdoor adventures and wine tastings to historical exploration and cultural immersion. The Shire provides an opportunity for visitors to enjoy the natural beauty and rich heritage of regional Victoria.

Figure 6: Pyrenees Shire mapped scope area
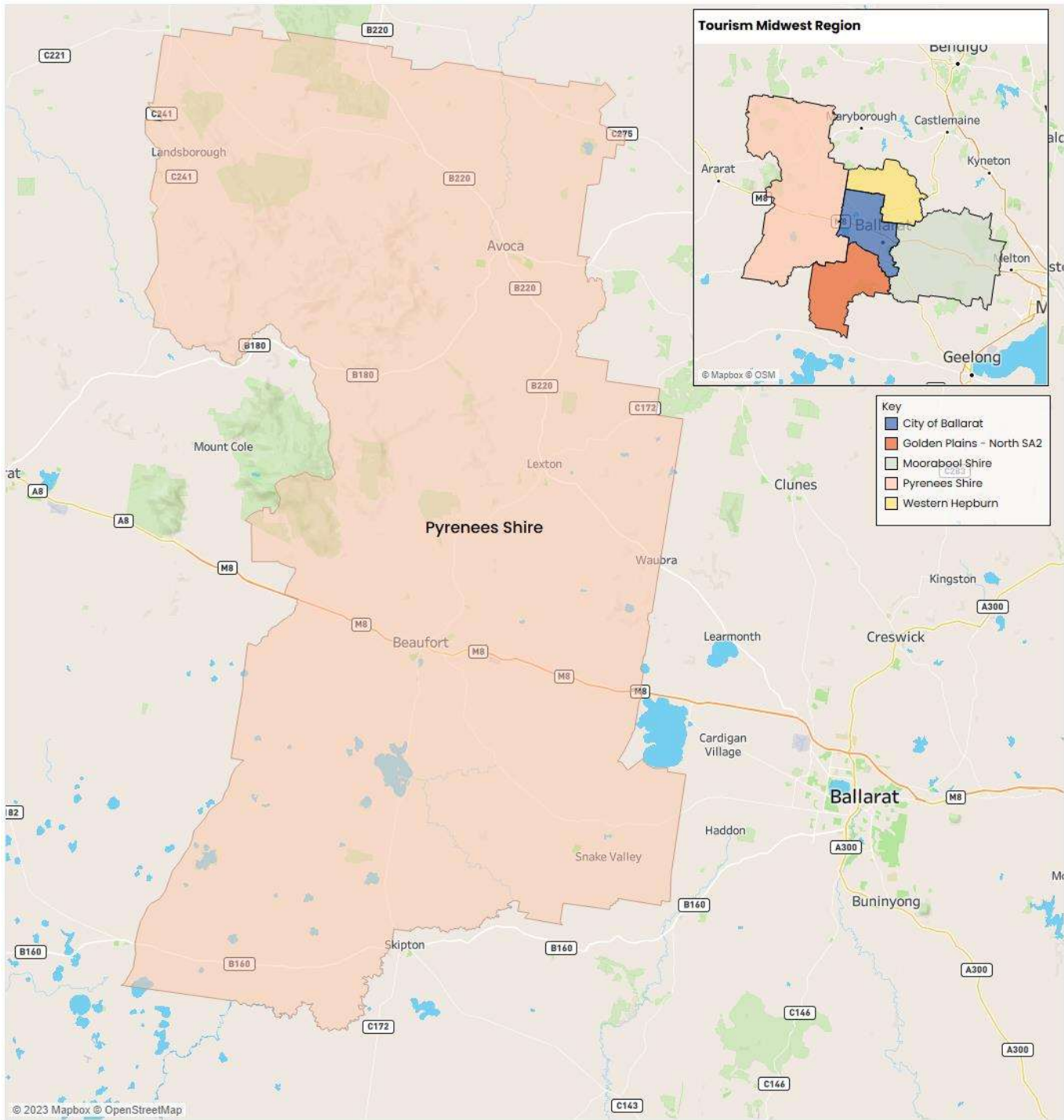
Our current product offering

Attractions and experiences

The Pyrenees Shire offers visitors a captivating blend of natural beauty, rich history, wine and cellar door experiences and charming rural landscapes, making it an enticing destination for exploration and relaxation.

The primary appeal of the Pyrenees Shire currently relates to its quality wineries and nature-based assets. Emerging strengths for the Shire include building on its caravan and camping offer, expanding its cycling/trail product, and better profiling/showcasing its wine offering.

Areas for enhancement and further development include, in particular, the supply of regional accommodation, commissionable products and visitor economy-supporting infrastructure. This also includes adding quality dining experiences to complement the cellar door experiences currently being offered.

Supply Assessment

The following audit is primarily based on an extensive 'data scraping' exercise that leveraged the following sources[5]: Tourism Midwest's database; the ATDW; TripAdvisor; Google Travel; and Google Maps.

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

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

- Based on the audit findings, there are 43 tourist attractions and experiences in the Shire.
- Of these attractions, the most common type comprises Natural Areas and Trails (33%) supporting this as an existing product strength for the Shire, followed by Historic Sites and Museums (28%).
- The majority of products and experiences are clustered around the towns and villages of Beaufort and Avoca.
- A top-line assessment of free versus paid products was undertaken. This demonstrated that an estimated 70% of the Shire's tourism products are free versus 30% being paid (compared with Ballarat, for example, which has 55%

free and 45% paid products). While having 'free things to do' in a region is an important part of a region's product mix, greater economic benefit tends to be generated through commissionable tourism experiences. This is because of visitor spending on the product, the ability for wholesalers to package products is greater and the ability to reinvest in the product is greater.

Consumer Sentiment Assessment

A consumer sentiment assessment was completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 2 for an overview of how the net promoter scores [NPS][6] are calculated). The results are summarised in Figure 7 and demonstrate the following.

- The Shire's experiences/attractions product receives an overall NPS of +59, based on 822 reviews.
- The product category that receives the highest average NPS score is Breweries and Vineyards, with a high NPS of +82. This is based on 216 reviews across 4 different categories.
- The product category with the lowest average NPS is Visitor Centres and Tours. However, the score of +39 is still in the range of an acceptable NPS.
- Paid product has a higher average NPS (+77) than free products (+41) reflecting consumer willingness to pay for products that are of a high enough quality/standard.

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

[6] A net promoter score (as explained in detail in Appendix 1), allows the consumer to rate the quality of the experience on offer based on their expectation and value for money. If a higher NPS is scored, this reflects that the consumer would recommend the tourist attraction or accommodation facility to others.

Figure 7: Pyrenees Shire attractions audit

Category	Count	Total Reviews	Avg. NPS
Breweries & Vineyards	4	216	82
Historic Sites and Museums	3	410	67
Natural Areas & Trails	4	153	47
Visitor Centres & Tours	3	43	39
Total	14	822	59

Paid 30%
Free 70%

Category	Count	% of Total
Natural Areas & Trails	14	33%
Historic Sites and Museums	12	28%
Breweries & Vineyards	6	14%
Visitor Centres & Tours	4	9%
Family Attractions	3	7%
Gardens	2	5%
Art Galleries & Theatres	2	5%
Total	43	100%

Only those attractions with 5 or more reviews, or categories with 3 or more attractions, were included in the sentiment/NPS assessement which is why the total number of attractions in this table is less than the overall property count for the region.

Category
- Art Galleries & Theatres
- Breweries & Vineyards
- Family Attractions
- Gardens
- Historic Sites and Museums
- Natural Areas & Trails
- Visitor Centres & Tours

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Accommodation

The Shire's accommodation supply is dominated by boutique properties, many of these being short-term holiday rentals. This has an impact on the ability to attract overnight visitors and results in economic leakage, as many visitors can only come as day travellers.

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

Supply Assessment

An accommodation audit was completed for the Shire. The audit revealed the following (Figure 8).

- The Shire's accommodation mix is dominated by Campgrounds (37%) and Boutique Accommodation (29%).
- The Boutique Accommodation product excludes some Airbnb properties as there is no way to eliminate dual listings across websites, however, a separate audit of Airbnb indicates that there are 1,776 Airbnb properties throughout the Midwest region – 3% (29) of which are in the Pyrenees Shire. These Airbnb properties have an annual occupancy rate of 47%.[7] While Airbnb accommodation is an important component of the region's accommodation mix, the dominance of this accommodation typology has created several challenges where the mix of resident housing, Airbnb stock and commercial accommodation appears to be out of kilter.
- The Shire has a limited amount of bookable unit stock. Usually, this stock is supplied by motels, hotels, and resorts but the Shire has a limited number of these properties. Feedback indicated that as a result, the Shire experiences leakage with visitors travelling for day trips and staying overnight in other areas that offer a greater mix of accommodation.

There is a need to encourage the development of more accommodation in the Shire, including:

- farmstays
- small-scale boutique resorts
- destination-style accommodation including glamping and eco-pods
- upgrading and improving existing accommodation and motel stock
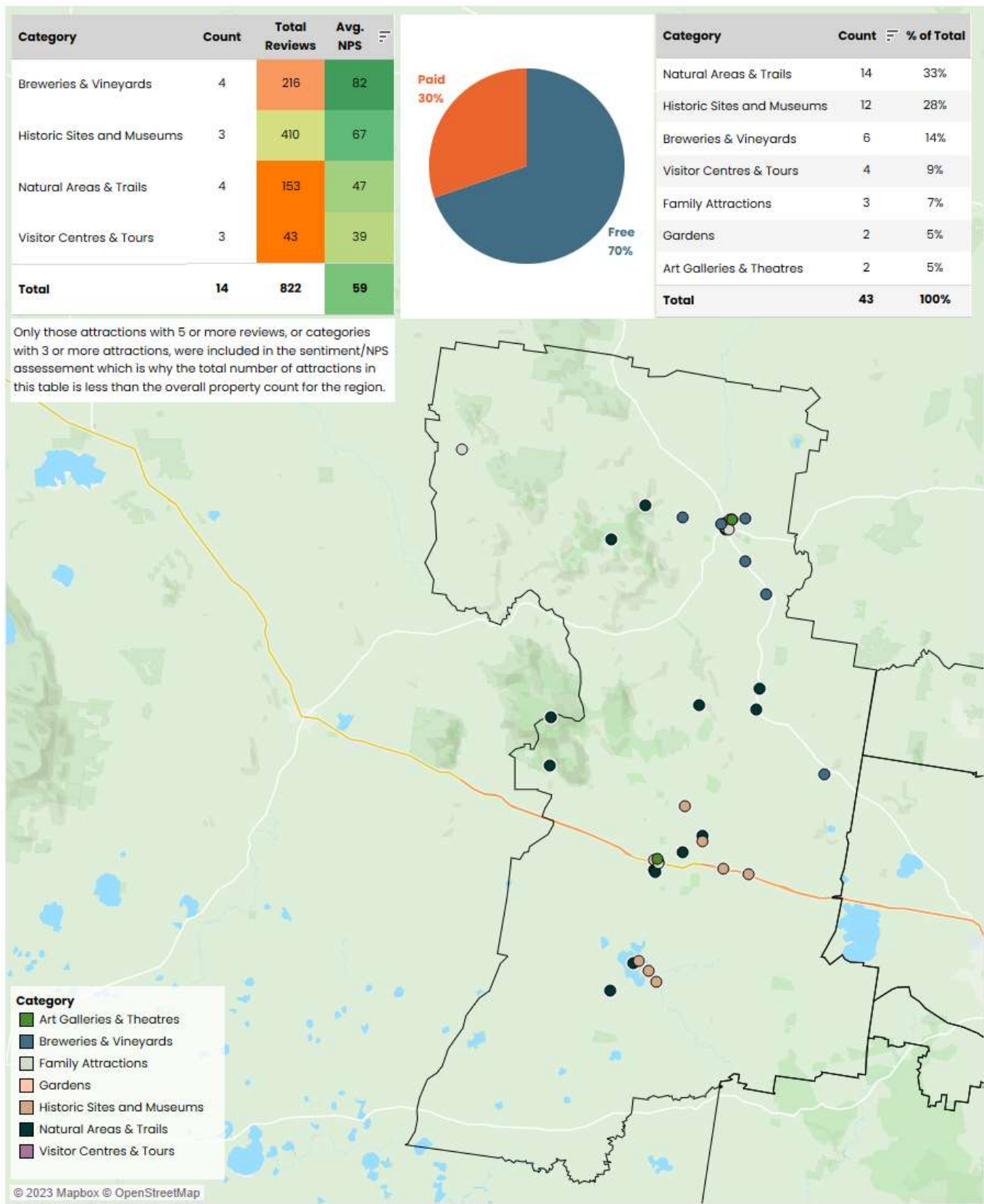- enhancements to caravan/holiday parks

Consumer Sentiment Assessment

A sentiment assessment was also completed on products that had more than five reviews available and where there were more than three products in a category (see Appendix 2 for an overview of how net promoter scores [NPS] are calculated). The results are summarised in Figure 8 and the findings are as follows.

- The Shire's commercial accommodation product receives an overall NPS of +49, based on 1,353 reviews. This falls within the 'good' range for NPS scores (based on Stafford's work completing accommodation audits throughout the country).
- The category that received the highest average NPS score is Boutique Accommodation closely followed by Hotels and Resorts. Both these categories receive a relatively strong NPS of +57 and +50 respectively, reflecting a higher degree of consumer satisfaction. However, comparing these upper-end scores with other regions, these are fairly low average scores. By way of example[8]:
- Waiheke Island, a nature-based destination in NZ, scored upper-end average scores of +90 for its Luxury Properties and +70 for its Boutique Properties.
- The Snowy Mountains in NSW received upper-end scores of +68 for its Farm Stay Properties and +90 for its Retreats, Lodges, and Resorts.
- The East Gippsland region received an upper-end score of +64 for its Boutique Properties.
- The NSW North Coast region received upper-end NPS scores of +74 for its boutique product and +72 for its holiday home product.
- Sunshine Coast and Noosa received upper-end NPS scores of +75 for their boutique product, +72 for their holiday homes and +70 for their speciality lodging product.

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[7] AirDNA

[8] Based on NPS assessments completed in Stafford.

Figure 8: Pyrenees Shire accommodation audit[9]

Category	Count	Total Reviews	Avg. NPS
Boutique Accommodation	8	205	57
Campgrounds	11	313	50
Motels	3	219	44
Hotels and Reorts	3	349	37
Caravan and Holiday Parks	3	267	35
Total	28	1,353	49

Only those properties with 5 or more reviews, and property categories with 3 or more properties, were included in the sentiment/NPS assessement which is why the total number of properties in this table is less than the overall property count for the region.

Category	Count	% of Total	Bookable Units	% of Bookable Units
Campgrounds	14	37%		
Boutique Accommodation	11	29%	42	37%
Motels	3	8%	29	25%
Hotels and Reorts	3	8%	23	20%
Caravan and Holiday Parks	3	8%		
Pub Acccommodation	2	5%	14	12%
Group Accomm & School Camps	1	3%		
Apartments	1	3%	6	5%
Total	38	100%	114	100%

Category
- Apartments
- Boutique Accommodation
- Campgrounds
- Caravan and Holiday Parks
- Group Accomm & School Camps
- Hotels and Reorts
- Motels
- Pub Acccommodation

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

Gap analysis

Based on the product audit, consultation findings and site visits, the following product gaps have been identified (Table 8). These have been linked to the Product Pillars identified in Figure 16 on page 37.

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

Table 8: Pyrenees Shire product gap analysis

| Product pillar		Product gaps and challenges	Product opportunity
First Peoples	Traditional Owners storytelling	▪ Currently, First Peoples' stories are underrepresented throughout the Shire.	▪ To incubate First Peoples' product and grow representation through partnerships and appropriate product inclusions. ▪ To ensure all product development starts with a First Peoples' first approach.
People and Place	A sense of place	▪ Currently, significant historic buildings and streetscapes lack storytelling and activation.	▪ Showcase compelling history. ▪ Encourage adaptive reuse.
	Arts and Creatives	▪ Current core arts and cultural attractions require investment to meet visitor expectations and industry standards.	▪ Elevate arts and culture to drive visitation and dispersal.
Creative Energy	Gastronomic excellence and Agri and growers	▪ A coordinated approach to leverage the Shire's gastronomic story consistently. ▪ A lack of a coordinated approach to opening hours of cellar door experiences. ▪ A lack of profiling food experiences to complement the Shire's wine offer.	▪ Ensure the Shire's excellence in gastronomy, viticulture, brewing and distilling is recognised through continuous promotion. ▪ Establish a recognised strength in food provenance. ▪ Develop a centralised cellar door experience to profile the wine experience and enable visitors to sample wine and produce year-round.
Nature at your fingertips	High usage trails and iconic views	▪ The Shire is not renowned for nature-based product.	▪ Leverage proximity to Melbourne, promoting accessible nature for the time poor or less confident regional traveller. ▪ Be known for easily accessible short walks, with views that cater to identified audience segments.
	Cycling hubs and mountain biking	▪ Lack of awareness of the Shire as a cycling and walking destination	▪ Support the development of cycling activity in major town centres and connectivity between them.
Enablers	Visitor servicing	▪ Visitor servicing does not meet the needs of today's traveller.	▪ Proactive visitor servicing methods enhance visitation and length of stay throughout the Shire and broader region.
		▪ Lack of accessible transport options.	▪ Support transport and connectivity through the Shire and broader region.
		▪ City and town centres are not compelling for visitors.	▪ Beautification of town centres with consideration of night-time economy, outdoor dining, connectivity, wayfinding and storytelling.
	Accommodation	▪ Shortage of accommodation both in terms of quality, quantity and value proposition. Largely B&B and holiday home properties.	▪ Attract public and private sector investment for new and enhanced boutique accommodation developments. ▪ Upgrades to existing caravan park offer in the Shire.
	Hospitality	▪ In some areas, basic hospitality is unavailable or limited.	▪ Ensure consistent hospitality availability is meeting visitor expectations. ▪ Improved streetscapes in Avoca and Beaufort to encourage visitors to stop and spend longer in the towns.
	Events	▪ There are limited destination-driving events that grow brand, yield and length of stay.	▪ The Shire requires events/activations that take place over longer periods and activate after-hours to encourage staying longer in the Shire. ▪ Demarcation needs to be established between community and visitor-driving events through a strategic framework.
	Infrastructure	▪ Directional and interpretive signage need improvements throughout the Shire.	▪ Undertake directional and interpretive signage audit for the Shire.
	Marketing	▪ Brand positioning which profiles the Shire as a sub-region of Midwest Victoria and showcases its strengths as a food and drink and recreation destination.	▪ New brand positioning to be considered for the Shire which aligns with regional branding.. ▪ A regional approach to be established to grow our reputation.
	Planning and advocacy	▪ Challenging for investors and developers to facilitate planning and land use arrangements across the Shire.	▪ Enable tourism infrastructure growth through advocacy to state and local government to address barriers and support investment in the Shire.

Our current visitor profile

Figure 9: Total visitation and visitation by visitor type, 2014-2023[10]

Visits to Pyrenees Shire

Key
Pyrenees Shire

Visits by Market

Visitor Type
Domestic Day   Domestic Overnight   International
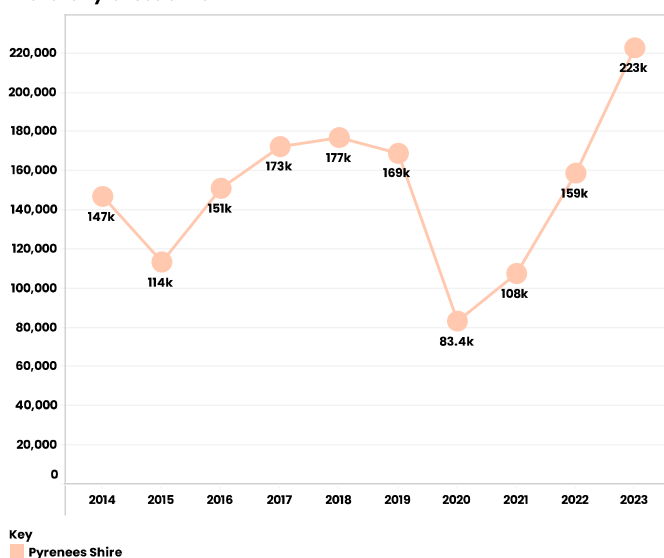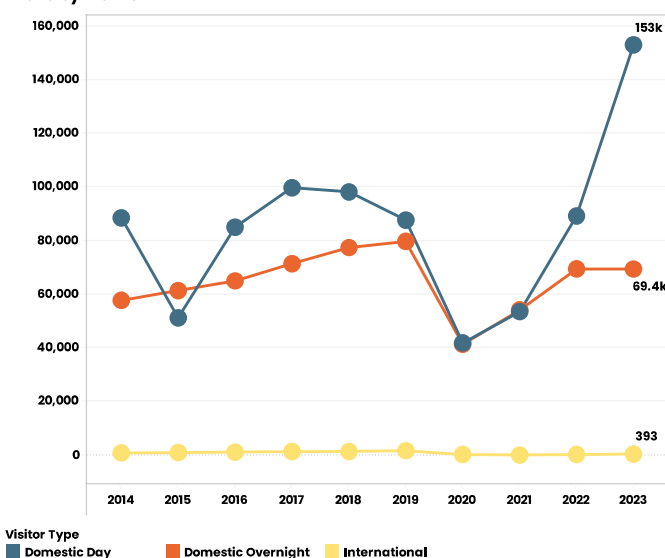
In 2023, Pyrenees Shire received 223,000 visitors, experiencing a strong rebound from COVID-19-impacted levels between 2020 and 2021. Before COVID-19, visitation to the Shire fluctuated, primarily driven by a varying domestic day trip market.

Over the 10 years assessed, domestic day trippers were the dominant visitor market, comprising just over 56% of all visits. While the day trip market forms an important component of the visitor economy, it typically is relatively low-yielding, accounting for only 18% of visitor spending in the Shire (based on the 10 years assessed). Domestic day trippers, on average, spent $66 in the Shire, compared with domestic overnight visitors who spent 5.8 times this amount at $386 per trip. Higher spending by overnight visitors is generated generally because of additional spending on accommodation, food and beverage, transport, attractions etc.

Some key objectives of this LAAP, as noted during the consultation phase is to grow visitor spending, dwell time and visitor yield.

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[10] Based on 3-year averages. March YE data. Tourism Research Australia, National and International Visitor Surveys, compiled by Stafford.

Visitor forecasts

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

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

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

Supporting data for these forecasts are included in Appendix 6.

Table 9: PSC forecasts[12]

Total spending in the Shire is forecast to reach $72.6 million by 2033

Visitor spending in the region is projected to be 95% above the pre-pandemic level by 2033, generating an additional $35.4 million in spend (up from $37.2 million in 2019).

Total spending in the Shire has already surpassed pre-pandemic levels due to a combination of latent demand for travel and inflationary pressures.

Total visitors to the Shire are projected to reach 320,000 by 2033, up from 223,000 in 2023[13]

Growth to the Shire is projected across all visitor markets. Domestic visitors are projected to continue to account for the largest share of visitors in the region, with an estimated 212,000 domestic day trip visitors and 108,000 domestic overnight visitors expected in 2033.

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

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

[12] Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/__data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)
[13] Ibid

Visitor Servicing Overview

PSC, like many councils around Australia, is primarily responsible for providing physical brick-and-mortar information centres around the Shire, in addition to offering other tangible elements of visitor servicing (such as signage) and elements of digital marketing.
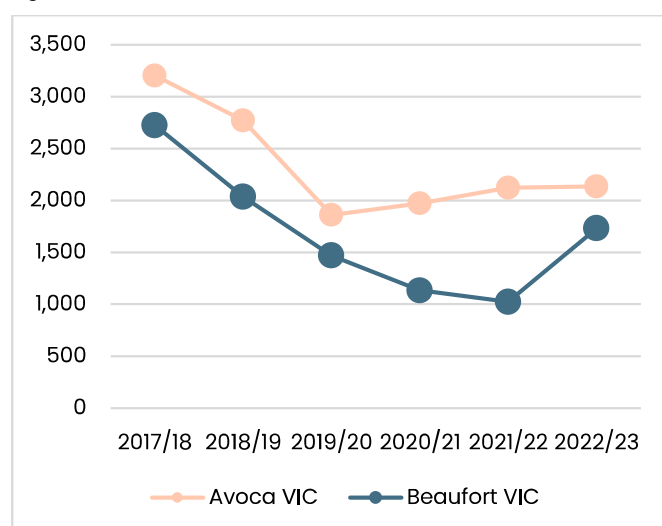
Visitor Information Centres

Pyrenees Shire has two VICs, one situated in Avoca and one in Beaufort (see Table 10). Neither of these VICs is accredited. Figure 10 provides a summary of visitation to the two VICs over the last six years.

Table 10: About the VICs

Location	Average Annual Visitation[14]
Avoca Visitor Information and Community Centre 122 High Street, Avoca Open Monday – Friday 10 am – 5 pm, Saturday – Sunday 10 am – 1 pm	2,344
Beaufort Information and Resource Centre 72 Neill Street, Beaufort Open Monday – Friday 10 am – 4 pm, Saturday – Sunday 10 am – 2 pm	1,686

Figure 10: Visitation to VICs, 2017/18 – 2022/23[15]

Digital Content

Websites

The Shire has its own destination website, Visit Pyrenees (see Figure 11)[16] and is also profiled on the Visit Ballarat website under the Beyond Ballarat tab (see Figure 12).[17] Some towns and villages have their own tourism websites led by local tourism or business associations. Tourism operator listings on the websites are extracted from the Australian Tourism Data Warehouse (ATDW).

Visit Pyrenees also has an App that provides content in an app-friendly format (see Figure 13).

Figure 11: Visitor Pyrenees Website

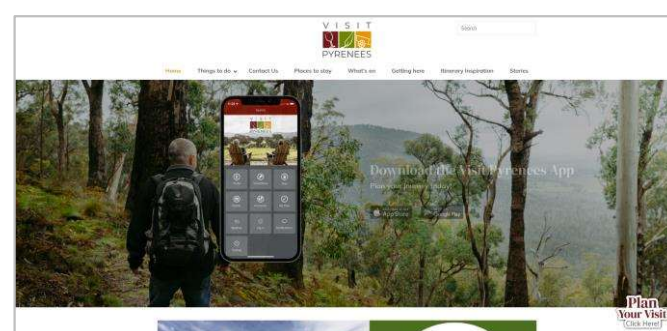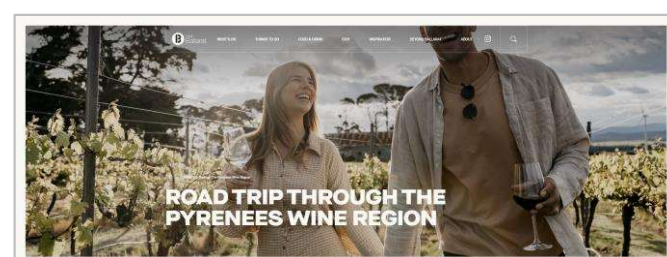
Figure 12: Visit Ballarat Pyrenees sub-page

Figure 13: Visit Pyrenees App

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[14] Based on a six year average
[15] Provided by Council

[16] visitpyrenees.com.au
[17] https://www.visitballarat.com.au/things-to-do/beyond-ballarat/pyrenees/

Social Media

Social media accounts on Facebook and Instagram are currently owned and managed by PSC (see Table 11). The content is typically highly curated and generated around what's on, current events, seasons, and media coverage. There is no Twitter, TikTok or Pinterest account specifically for the Pyrenees Shire.

Content for the Shire is also generated via Visit Ballarat's social media accounts which has stronger engagement/reach and extends across a larger range of platforms.

There are several unofficial smaller-scale social media accounts promoting the towns/villages around the region which creates fragmentation/confusion[18].

Signage and Wayfinding

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

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

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

Printed Collateral

The Shire has adopted more of a digital approach to visitor information with an online trip planner (see Figure 14) as well as a mobile app for the Shire.

At times, there are small features of some towns/villages in the Ballarat Magazine (see Figure 15).

Figure 14: Online travel itinerary planner

Figure 15: Ballarat Magazine

Table 11: Social media summary

Platform	Name	Engagement (Followers/Likes)	Posting Schedule
Facebook	Visit Pyrenees, Victoria, Australia	2.7K likes 3.2K followers	Daily
	Visit Ballarat	73K likes 74K followers	Daily
Instagram	@visitpyreneesvic	1.7K followers	Every 2 – 3 days
	@visitballarat	27.5K followers	Every 2 – 3 days
TikTok	visitballarat	2321 Followers 9808 Likes	Every 4 – 7 days
YouTube	@visitballarat1803	309 subscribers	Sporadically
Pinterest	@visitballarat	212 followers 2.1k monthly views	n/a

[18] For example, https://www.facebook.com/VisitAvoca/

Part 3: Who are our audience segments?

Our community and the visiting friends and visiting relatives market

The Pyrenees Shire community holds the key to attracting the visiting friends and relatives (VFR) market. As hosts and trusted referrers, local residents have the greatest influence on how long their visitors choose to stay and how they spend their time and money. The VFR market is a significant market for the region, comprising 35% of all travel to Midwest Victoria[19]. Visiting a friend or relative is the second most common motivator for travel, after leisure-based travel.

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

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

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

VFR Host Market	VFR Market
- VFR hosts play a highly influential role in the destinations visited and the activities undertaken by VFR. Given the role of hosts, opportunities exist to market to local communities that influence visitor activities. - Mature hosts are more at ease with centring a visit around their home. There's an expectation that visitors are motivated by seeing 'me' and thus welcoming them in-home is tied to being a good host. By contrast, younger people are more likely to feel visitors want to make more of their visit and that sitting at home may feel too intensely personal. - Those with visitors coming from further afield/longer-term/less frequently are more focused on making a special effort. Hosts are compelled to 'impress' visitors by doing something out of the ordinary. - High volume hosts (those who hosted >10 visitors in the past year) tend to be more socially outgoing. By contrast, some less outgoing hosts may find it more challenging to know where to take visitors (e.g. for dinner/drinks). - VFR travel drives dispersion and spending – it encourages the VFR host market to try something new. - A major motivator of visitation for the VFR market is events, with VFR hosts nearly always the instigator of events-based travel (e.g. not the visitor finding the event and inviting the host). - VFR hosts are often more adventurous in their city because of their visitors (e.g. being pushed to do something different).	- Those visiting family: - Tend to be older people. - Tend to be friends and family groups travelling with children. - Spend more nights staying in the homes of relatives or friends. - Are more likely to go shopping and spend money on transport, souvenirs and gifts. - Those visiting friends: - Tend to be younger. - Spend more nights in commercial accommodation. - Tend to travel alone or in groups without children. - Tend to spend more on food and drinks, and at pubs and nightclubs. - There is an increasing trend towards VFRs using commercial accommodation. People are going away on trips less often and want to make their break as stress-free and independent as possible while still enjoying social connections. - VFR visitors tend to come without a plan (and this appears to be more common in the region than other destinations). - Being a large centre, local knowledge is felt to be particularly valued in the region. It's not always obvious what to do in the region compared to other destinations.

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[19] Based on a 10-year average, September YE (2014 – 2023)

Our visitors

Our audiences – a summary

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

Midwest Victoria's target audience segments are as follows: Active Regional Explorers; Regional Fledglings; Family Heartland; Mature Tastes[20]; Domestic Culturally and Linguistically Diverse (CALD) visitors; and International High-Value Travellers. Table 13 provides information on these markets.

The markets that have greater applicability to the Shire, include the following:

- Regional Fledglings;
- Mature Tastes; and
- International High-Value Travellers.

Table 13: Midwest Victoria's target audience segments

Regional Fledglings	Mature Tastes

Regional Fledglings

Profile:

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

What the market wants:

- Explore 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.
- By far, the most compelling expression of the region is as a short weekend getaway with a full and interesting itinerary.
- Travel often, but typically on short weekend breaks or day trips.
- Emphasis on Airbnb-type accommodation.
- Trips are commonly based around a half-day hike/bushwalk.
- Modern dining, wineries, craft beer, music events/festivals, novelty and intrigue.

Mature Tastes

Profile:

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

What the market wants:

- Value taking it easy and relaxing over a packed itinerary.
- Self-identify as a foodie, make planned dining arrangements and seek out produce.
- Visitation is centred around townships, not nature.
- Schedule a handful of overnight trips per year, tending to be preplanned rather than spontaneous.
- More likely to be led by a female decision-maker.
- Modern food and wine offerings (but in the comfort zone).
- Spending time in picturesque settings (but limited proactive engagement e.g. art gallery).
- Brochures, information centres etc support online research.
- Higher-end accommodation and booked dining are a must-have starting point. Mature Tastes may look to operators (who specialise in their demographic) to suggest an itinerary.

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[20] Target Audience Segmentation, December 2020, Quantum Market Research

Active Regional Explorers

Profile:

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

What the market wants:

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

Family Heartland

Profile:

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

What the market wants:

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

Profile:

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

What the market wants:

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

Profile:

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

What the market wants:

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

Part 4: What will our future look like?

Our vision, aspiration and values

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

Our vision

The following vision has been developed as a forward-looking, aspirational and co-created statement that articulates the long-term goals and desired outcomes for Midwest Victoria as a visitor destination.

Wonderful, welcoming with just the right amount of quirk, Midwest Victoria as a place to visit reflects the region's diversity, culture, history and creativity nestled in a natural landscape that underpins what the region offers to the visitor.

Our aspiration

Victoria's Midwest will be a layered sustainable destination that enhances communities by creating connections between visitors, creative people, nature and places, thus building a thriving visitor economy.

Our values

Our values define our identity, shape our beliefs and govern our conduct. They provide a framework for how various stakeholders within the visitor economy ecosystem engage with, and contribute to, the region's visitor economy. They demonstrate a collective commitment to addressing regional challenges that impact the delicate equilibrium among visitors, communities, the environment and the economy.

Table 14: Our values explained

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

Our success targets

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

To ensure we're on the right track of developing a "sustainable destination that enhances communities," a series of targets have been developed across the categories of economy, industry, community, culture and environment to measure our success.

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

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

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

Measuring the value of the visitor economy

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

		Measure	Target Type	Source/Benchmark	Current (2023)	Goal (2033)
Tier 1 Targets			Visitation	Visitor numbers to the Shire (day and overnight, domestic and international) as per the NVS & IVS.	223k	320k
			Visitor spend	Spend by visitors in the Shire as per the NVS & IVS.	$37.2m	$72.6m
Tier 2 Targets		Ratio of overnight to day visitors	Number of overnight to day visitors as per the NVS & IVS data.	0.46	0.51
		Average length of stay	Visitor nights data divided by visitation data collected from the NVS & IVS	4.0	4.8
		Spend per visitor	Total visitor spend data divided by total visitation data captured from the NVS & IVS	$166	$227
		Employment	Tourism employment data from Remplan and Economy ID *(sourced from Tourism Satellite account)*	100	110

What we strive for

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

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

Our direction and focus areas

What will we be known for?

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

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

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

The strength of the Pyrenees LGA lies in its strong current focus on wineries and associated cellar door experiences along with its existing trails and tracks for walking, trail running and cycling and as a venue for smaller-scale events (weddings, wine-based etc). The Shire's tourism product aligns well with two of the State Government's tourism product pillars of nature attractions and food and drink.

Figure 16: Our direction and focus areas

1

Our positioning.
Delivering brilliant experiences to our visitor that offer the unexpected.

2

Our product pillars.
The major categories for focusing product development for the Midwest region for delivering the brilliantly unexpected visitor experiences.

3

Experience Victoria 2033 product priorities.
Direct alignment between the EV 2033 product priorities and the DMP product pillars.

4

Our product development focus areas.
The product development focus areas build on the strength of the collective Midwest region and link to the product pillars.

Enablers

PRODUCT DEPENDENCIES	SUPPORT ACTIVITIES	GUIDING PRINCIPLES
• Accommodation	• Visitor Servicing	• Inclusivity
• Transport and connectivity	• Marketing	• Accessibility
• Hospitality	• Industry training and development	• Sustainability
		• Community wellbeing

Positioning[21]

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

Product pillars

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

Signature experiences

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

First Peoples Culture

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

Four First Peoples groups have Country across Pyrenees Shire:

- Wadawurrung Traditional Owners Aboriginal Corporation.
- Dja Dja Wurrung Clans Aboriginal Corporation.
- Barengi Gadjin Land Council.
- Eastern Marr Aboriginal Corporation.

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

People and Place

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

Creative Energy

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

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

Pyrenees Shire will continue to capitalise on its creative energy pillar which underpins diverse businesses and experiences throughout the region.

Nature at your Fingertips

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

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

Enablers

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

Product development focus areas

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

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[21] In 2023, the City of Ballarat undertook a major market research and development exercise to support the creation of a refreshed brand and positioning statement. This positioning and marketing for Ballarat builds on the latest major research studies to position the city as a highly appealing visitor destination with its strong food and drink offering, its range of major cultural and sporting events, and building on the theme of offering Brilliantly Unexpected experiences.
The other councils in the TMV region have yet to go through a major brand and market positioning exercise. The responsibility for this would be with each of the four councils, noting that the budget to cover the market research and associated brand development for each may be significant.
Although it would not be the responsibility of TMV to fund a regional positioning exercise for all the LGAs, it is important that effective linkages occur to support visitor dispersal across the LGAs along with illustrating the complimentary products and experiences which exist across the Midwest to make it a stronger and more cohesive visitor destination.

Our way of working

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

Table 17: Our way of working

Area	How we will deliver this
Sustainability	Promoting sustainable practices is an essential outcome of this LAAP. This includes identifying ways to minimise negative impacts on the environment, communities and cultures. For the Shire, this will include the following: ■ Encouraging operators to implement sustainable practices including energy-efficient technologies, waste reduction strategies and measuring carbon emissions. ■ Involving local communities in tourism planning and development to ensure that concerns and needs are understood. ■ Encouraging wildlife conservation efforts and responsible wildlife viewing. ■ Ensuring there is respect for local customs and traditions among visitors and cultural sensitivity. This may require providing cultural education and awareness programs to visitors to promote responsible and respectful behaviour. ■ Implementing strategies to manage and limit the number of visitors in sensitive or ecologically important areas (i.e. carrying capacities). ■ Developing educational programs for visitors to raise awareness about the environmental, social and cultural impact of their visit. It will also involve providing information on responsible tourism practices and encourage eco-friendly behaviours. ■ Encouraging visitors to support local businesses, including locally-owned food and drink providers, makers, creators and retailers. This helps in distributing economic benefits more evenly within the community. ■ Encouraging the use of sustainable transportation options, such as public transport, cycling, walking and a potential hop-on, hop-off bus. It also involves supporting eco-friendly initiatives like electric vehicles and offset carbon emissions through relevant programs. ■ Encouraging operators to apply for recognised sustainability certifications and standards, such as EcoTourism Australia, EarthCheck, or Rainforest Alliance (by way of example only). Certification programs can help verify and communicate a commitment to sustainable practices. ■ Encouraging operators to implement effective waste management practices, including recycling and reducing single-use plastics. And encouraging visitors to minimise their waste and educating them on proper disposal methods. ■ Encouraging or providing ways for visitors to offset their carbon footprint through contributions to carbon offset programs. ■ Regularly monitoring and evaluating the environmental, social and economic impacts of tourism activities through the Sustainable Tourism Indicators Research. It also involves using this data to make informed decisions, adjust strategies and continually improve sustainability efforts.
Accessibility	Encourage stakeholders (public and private) to offer experiences, facilities and services that are accessible and enjoyable for individuals of all abilities. This may include: ■ Investing in accessible infrastructure (e.g. the installation of ramps, elevators, accessible bathrooms and other features); ■ Introducing adaptive technologies (such as audio guides, sign language interpretation services and apps with navigation assistance); ■ Offering accessible information; and ■ Collaborating with advocacy groups. ■ This will support the region in becoming a destination of choice for all visitors.

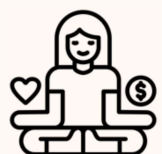| Area	How we will deliver this
Inclusivity	Creating more inclusive experiences involves actively addressing the needs and preferences of a diverse range of visitors. This includes (but is not limited to) people with a disability, those from various cultural backgrounds, LGBTQIA+ visitors and older travellers. Ways in which the Shire will seek to be an inclusive destination will include: - Providing a destination that is accessible to people with a disability. This includes education around hidden disabilities, such as recognising the 'sunflower lanyard'. - Providing cultural sensitivity training for industry to enhance their awareness and understanding of diverse cultures, traditions and customs. This will help in providing respectful and inclusive experiences for visitors from various backgrounds. - Offering information, signage and services in multiple languages to cater to international visitors. Ensuring the visitors we portray in our marketing materials reflect the diversity of our visitors and the community. - Developing and promoting events and activities that are inclusive and cater to a wide range of interests and abilities (including options for families, seniors, individuals with disabilities, and various cultural backgrounds). - Consider the implementation of policies that demonstrate inclusivity and respect for LGBTQIA+ visitors. - Ensuring that facilities and services are inclusive and respectful of diverse gender identities, including encouraging availability of all-gender restrooms. - Promoting diversity in the Shire's and Midwest Victoria's tourism workforce, so that industry can better understand and meet the needs of a wide range of visitors.
First Peoples engagement and partnerships	The region's First Peoples will guide us to develop and promote tourism experiences that deepen visitor awareness of their living culture and connection to Country. We will ensure this is undertaken at a pace that is acceptable by each First Peoples' group in Pyrenees Shire, noting that each group has a different priority for tourism development.
Community wellbeing	The growth of the visitor economy can have both positive and negative impacts on community wellbeing. A sustainable tourism approach, as adopted by this LAAP, aims to maximise the positive contributions while minimising any adverse effects. We will seek to enhance community wellbeing through the following: - Consistent and ongoing engagement – An engaged community actively participates in, and benefits from, tourism. Inclusive decision-making processes, local input in tourism planning and opportunities for community members to share their knowledge and traditions contribute to community wellbeing. This LAAP ensures there is engagement with the community at a local and regional level on an ongoing basis. - Preservation of culture – There needs to be a focus on the preservation and promotion of local cultures, traditions and heritage. Tourism should respect and celebrate the cultural identity of the community. First Peoples must be consulted in relation to any initiatives pertaining to their community, traditional knowledge and living culture. Support infrastructure development - Well-planned tourism development can lead to improved infrastructure that benefits both residents and visitors. This includes better roads, public spaces, healthcare facilities and utilities, enhancing the overall wellbeing of the community. There are several supporting infrastructure projects in the pipeline for the region (and some currently underway) that should be linked to the tourism sector and actively promoted as such. - Education and awareness - Community wellbeing is enhanced when residents are educated about the benefits and challenges of tourism. An awareness program is required in the region to help residents understand the importance of the sector and sustainable tourism practices.

Part 5: Our action plan

Priority local projects

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

During the LAAP process, a wide variety of initiatives were identified for the Shire. To ensure the LAAP is implementable and realistic, the following are suggested as the priority local projects. These projects have been identified, workshopped, and discussed with community and council. Once these projects are underway, consideration can be given to rolling out additional projects identified.

Priority 1: Destination branding exercise

Undertake a destination branding exercise for the Shire to grow a much clearer destination awareness. Feedback received indicates that currently, the visitor market struggles to understand the value and brand proposition of the Shire.

The brand work should be developed by a professional destination brand developer with strong industry involvement to help ensure buy-in. at this stage, a logical focus for the branding would be the Shire's food and drink product along with its nature/recreational product.

Priority 2: Support cycling activity in Beaufort, Avoca, and Moonambel

The Shire's stunning environment provides the opportunity to support increased nature-based activities through the development and enhancement of trails, aligning seamlessly with its natural environment. Nestled amidst stunning landscapes, the Shire boasts a diverse environment providing a perfect canvas for outdoor enthusiasts.

Investing in the improvement and promotion of trails will not only enhance recreational opportunities but also assist in fostering a deeper connection between visitors and the Shire's surroundings.

Opportunities could include:

- linking gravel cycle products to wineries, gardens and points of scenic and historic interest.
- Investigate the natural extension of the Avoca to Moonambel trail and capitalise on gravel tracks around Beaufort.
- Undertaking general maintenance and trail enhancement works.
- Developing a comprehensive trail brochure for the Shire to better promote trails.
- The potential to link in more closely with broader regional trails such as those being developed in Western Hepburn.

It is also understood that Beaufort Connect and members of the Trawalla Community have met with PSC staff to discuss an application to complete a feasibility study and concept pans for cycle tracks in the Trawalla State Forest with linkages to Beaufort Lake and the Caravan Park. This should continue to be progressed.

Priority 3: Upgrades to Beaufort Lake Caravan Park and Avoca and Landsborough Caravan Parks

Beaufort Lake Caravan Park, owned by Pyrenees Shire Council (PSC), currently offers a variety of accommodation options surrounding the grassy banks of Beaufort Lake. These include cabins, unpowered sites, powered sites and powered ensuite sites.

In 2001, the Park was upgraded, funded by $270,000 from the Federal Government's Drought Communities Program, with a new two-bedroom cabin installed.

The success of this upgrade has seen PSC embark on additional planning for the Caravan Park including an additional: 11 powered sites; 1 unpowered site; 8 annual/permanent sites and 13 cabins. It is understood that this project has received partial funding.

The potential also exists to undertake discussions with commercial destination holiday park operators to gauge interest in the development or upgrade of an existing caravan park in the Shire.

Figure 17: Beaufort Lake Caravan Park proposed site plan
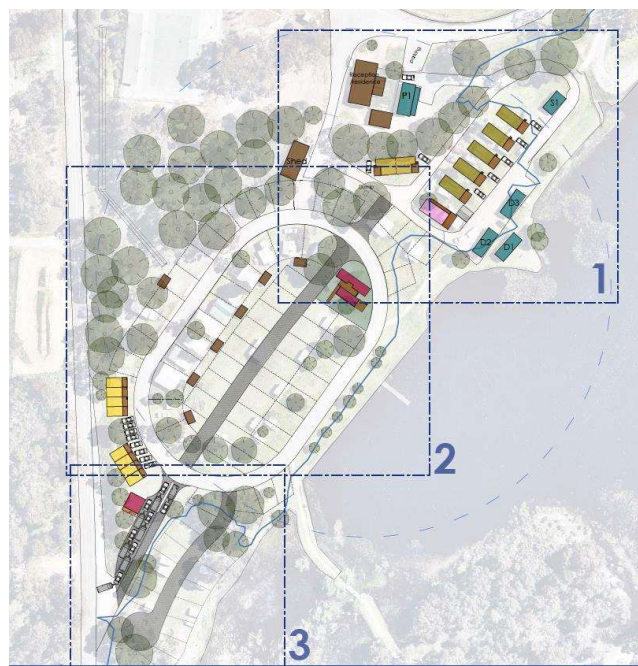
The opportunity also exists to leverage Avoca and Landsborough Caravan Parks and undertake an expansion of these parks to cater to a larger number of visitors and a more diverse visitor profile as well as the potential to offer worker accommodation.

Priority 4: Boutique accommodation

As highlighted previously, there is a dearth of commercial accommodation options outside the CBD of Ballarat. This results in visitors typically undertaking day trips only to these areas with economic leakage occurring.

There is a need to investigate introducing accommodation that is of a size and scale that would be appropriate to the Pyrenees LGA to generate greater economic uplift from the visitor economy.

For Avoca and Beaufort, destination-style accommodation could be considered. Destination-style accommodation includes farmstays, eco-pods, tiny homes/cabins, and glamping. Where possible, these should be linked to wedding and smaller event venues.

Figure 18: Experiential accommodation precedents[22]

Priority 5: Centralised cellar door experience

The Pyrenees wine area is only a two-hour drive from Melbourne. The wine region is known for its superb wines and distinct microclimate. Several boutique wineries produce award-winning wines.

While the region's wine offering is growing, it struggles at times to compete with other larger wine regions because of a lack of visible presence and limited food-based experiences to pair these with wineries.

Many vineyards and winemakers nationwide indicate they are keen to explore tourism uses on-site but are challenged by issues including insurance, finding sufficient staff and biosecurity issues. This is often the case for more boutique producers.

To help overcome this, the potential exists to develop a wine and produce showcase centre within the Pyrenees. This could: feature the region's vineyards; offer a shopfront for the vineyards; and potentially on a rotating basis, offer tastings.

To assist with project commercial viability, a pop-up and seasonal facility is suggested until it can be a permanent facility with secure revenue streams. It is noted, however, that there may be vacant buildings in Avoca and other locations that may be able to be repurposed for this as well.

Figure 19: Wine showcase precedents

Because of the strength of some of the food producers/ growers in the region (olives etc.), the potential also exists to investigate including them in the centre so the facility becomes a true showcase of the best of the Midwest's wine and related produce.

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[22] Glamping Resort Varie, Japan; Melozhori Pods, South Africa; Barranca Farmstay, NSW

Priority 6: Avoca and Beaufort streetscapes

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

Consideration to developing beautification and activation plans, leveraging the Pyrenees Futures Project, for Avoca and Beaufort towns should be given. These could investigate initiatives such as more landscaping, adding pedestrian-friendly features like walkways and benches, installing decorative lighting, improving signage, upgrading wayfinding, and revitalising historic buildings or landmarks.

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

Figure 20: Avoca town entry - existing

Figure 21: Beaufort main street - existing
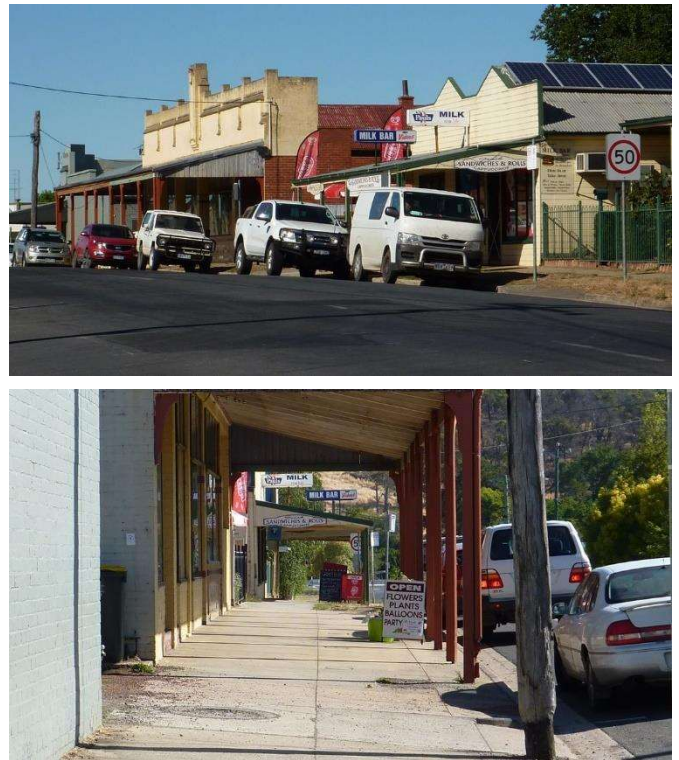
Priority local project action plan

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

The timeframes included in the action plan reflect the following:

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

Table 18: Priority project action plan

Project	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
Destination branding exercise	1. Undertake regional audience segmentation research 2. Develop a sub-destination positioning framework 3. Commission a digital asset library 4. Develop an annual strategic marketing plan	Support activities	A greater understanding of sub-regional markets is achieved. Positioning work is commenced for other Midwest Victoria LGAs.	$150k[23]	TMV (coordination), LGA (funding)	Short-medium term
Support cycling activity in Beaufort, Avoca, and Moonambel	1. Undertake audit of the Shire's cycling trails 2. Investigate areas of maintenance needs on the existing network 3. Explore the extension of the Avoca to Moonambel trail 4. Investigate opportunities to link into the broader regional trail network 5. Develop a digital map that profiles the Shire's trail network.	Nature at your Fingertips, Creative Energy, Product dependencies	Cycling activity in the Shire grows and connectivity between experiences improves	$40k	PSC	Short term
Avoca and Landsborough Caravan Park upgrades	1. Determine upgrades required for both caravan parks. 2. Determine timing for upgrades and if staged. 3. Investigate private sector interest in introducing a branded destination holiday park operator at Avoca.	Product dependencies	Caravan park upgrades are undertaken and destination holiday park operator interest is gauged	$2.8m	PSC	Short-medium term
Beaufort Lake Caravan Park upgrades	1. Complete upgrades of accommodation units and supporting infrastructure. 2. Promote upgraded and extended facilities.	Product dependencies	Caravan park upgrades are undertaken	$2.0m	PSC	Short-medium term

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[23] Sourced via possible grant funding

Project	Recommended Actions	Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
Boutique experiential accommodation (farmstays, glamping, eco-pods)	1. Investigate options for types of accommodation development and locations. 2. Work with industry operators and investors on supporting locations.	Product dependencies	New boutique experiential accommodation is offered in the Shire	$1.5m	PSC	Medium term
Develop a centralised cellar door experience in the northern part of the Pyrenees Shire	1. Feasibility to create a centralised cellar door/winery centre. 2. Assess existing building options in Moonambel and Avoca as potential sites (including possibly the Albion as a shop frontage) 3. If viable, develop a concept and detailed design. 4. Create the facility as a visitor wine and food-related attraction, possibly co-located with a visitor centre.	People and Place, Creative Energy	A centralised cellar door experience is developed to profile the Shire's wineries and food products.	$2.5m	Industry operators, wine association, PSC, TMV	Medium Term
Avoca and Beaufort streetscape enhancements	1. Undertake a beautification and activation plan for both towns 2. Identify additional grant funding streams to activate and support the plans 3. Develop a prioritisation program and gain the support of local business owners and operators.	Product Dependencies	Beautification and activation plans are developed and implemented	$150k per town	PSC, business owners and operators	Medium term

Regional projects identified in the SDMP requiring local input

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

The timeframes included in the action plan reflect the following:

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

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

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

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

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
1.1	Advocacy	1. Develop a SDMP Advocacy Plan with stakeholder identification, advocacy principles and advocacy priorities 2. Coordinate advocacy via TMV	Support activities	The SDMP is activated, reviewed and managed.	$5k	TMV, All LGAs	Short term
1.3	Crisis management	1. Develop TMV Crisis Management Plan 2. Provide Industry Resilient Ready/Crisis Preparedness Program	Guiding principles	Plans are activated to appropriately respond to emergency, crisis and climate-related events. The industry is prepared and has mitigation strategies in place.	$25k	TMV, All LGAs	Annually
1.4	Funding	1. Develop a Grants and Funding Strategy 2. Match priority projects to grant funding schemes 3. Determine specific project leads for grant applications	Support activities	External funding is secured for Priority Projects identified in the SDMP Action Plan.	$50k	TMV, All LGAs	Short term
1.8	TMV resourcing	1. Advocate for TMV centralised tourism model 2. Advocate for centralised resourcing	Support activities	Improved resourcing for tourism is achieved.	$50k in total (MSC, PSC, HSC, GPSC) $150k from BCC specifically.	TMV, All LGAs	Short term

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

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

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
4.2	Connected public transport	1. Investigate the development of a Hop-On/Hop-Off Transport Shuttle Business Case 2. Advocate for public and private transport connections 3. Undertake electric vehicle industry advocacy	Product dependencies, Guiding principles	A connected transport network is available, enabling visitors to travel to destinations with or without a private vehicle.	$65k	TMV, All LGAs, attraction operators	Short – medium term
4.4	Events infrastructure	1. Complete Regional Events Facility and Assets Audit 2. Undertake Regional Business Events Venue Feasibility Study	Product dependencies	Identification of suitable viable event venues.	$100k	TMV, All LGAs	Medium – longer term
4.5	Integrated transport planning	1. Influence and provide advice on Local Government Integrated Transport Plans	Product dependencies, Guiding principles	More aligned transport planning resulting in visitors being able to get to and around the region without a car or paid tour.	n/a	TMV, All LGAs	Ongoing
4.6	Investment attraction	1. Create a TMV Investment Attraction Strategy and Prospectus 2. Continue major project masterplan and funding advocacy 3. Advocate for increased worker attraction in the region	Support activities	Private and public sector investment into priority projects identified within this SDMP.	$85k	TMV, All LGAs	Short term
4.9	Signage and wayfinding	1. Complete a Regional Wayfinding and Signage Strategy and Framework 2. Implement and complete the Goldfields Gateways Project 3. Incorporate digital storytelling and visitor servicing into new signage and wayfinding projects	Product dependencies	Visitor and local navigation and interpretation of the region are improved.	$100k	TMV, All LGAs	Medium term
4.10	Tracks and trails	1. Develop a Regional Tracks and Trails Network Masterplan (inclusive of walking, cycling, horse-riding and high-usage trails)	Product dependencies, Nature at your Fingertips	Tracks and trail planning are integrated and coordinated moving forward.	$80k	TMV, Parks Victoria, All LGAs	Medium term

# No.	Sub-Theme	Recommended Actions	TMV Product pillar or enabler(s)	Key Outcomes	Estimated cost	Who	When
5.1	Destination-driving events	1. Develop a region-wide Tourism Events Strategy 2. Promote opportunities for food, produce and drink events 3. Develop a program that promotes local produce and farmers' markets 4. Identify arts and culture-based events that can occur across the region. Focus on those that can run for longer periods and activate the night-time economy 5. Support literary and cultural events 6. Develop a major cycling event	Signature Experiences, Creative Energy, People and Place, Nature at your Fingertips	Destination-driving events are growing the profile of Midwest Victoria and delivering on our product pillars.	$200k	TMV, All LGAs	Medium term
6.1	Enhancing capacity to deliver meaningful experiences	1. Review and action the Grampians Workforce Development Strategy 2. Workforce attraction, desirability of careers in industry and calibre of workforce 3. Consider a Workforce Planning Promotional Campaign 4. Investigate the development of a food and beverage roster 5. Offer annual TMV product development programs	Support activities	Workforce availability to meet demand and any seasonality changes.	$100k	LGAs, Industry, State Govt, TMV	Short-medium term

Part 6: Appendices

Appendix 1   Survey Results – Local Insights

52 Responses

- A survey was distributed over just over one month to the community and industry throughout the Tourism Midwest region.
- The survey received **201** responses in total.
- Pyrenees Shire received **52** responses in total.
- Overall, the sample size for the total Tourism Midwest Region was robust, achieving a 95% confidence level and a 7% margin of error
- The sample size for the Pyrenees Shire Survey was also robust, achieving a slightly lower confidence level of 85% and a 10% margin of error.

Question 1

What Council area do you primarily associate with?

Question 2

- A very good representative spread of postcodes was achieved
- Understandably major towns got greater representation
- We will continue to engage with communities and industry throughout the process to encourage wide involvement
- Considering that several LGAs felt their industry and community were over-surveyed in recent times, the response rate and spread is impressive

2. What postcode do you primarily associate with? (Pyrenees Shire)
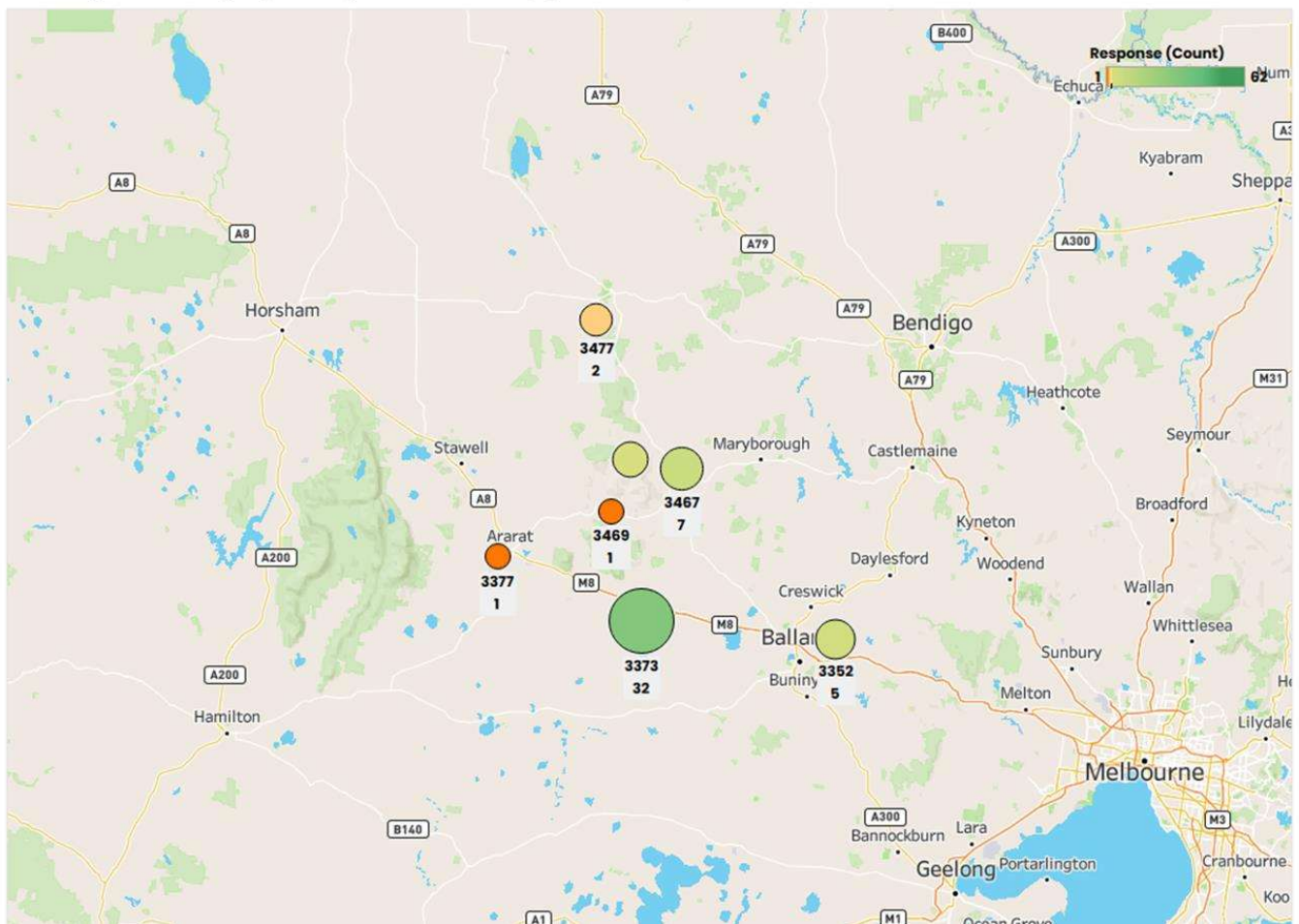
Question 3

- A good split between business-industry respondents (2/3) and separately interested community members (1/3)
- Good to have also captured business reps who aren't residents but are investors-operators

3. In what capacity are you completing this Survey? (Pyrenees Shire)

18 (34%)

3 (6%)

32 (60%)
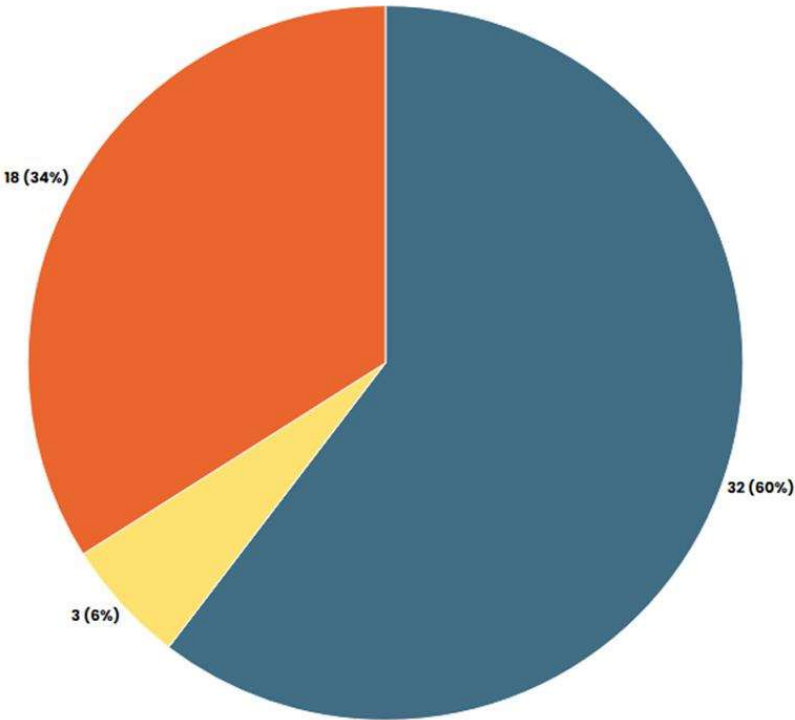
Response
- Business representative (and also as a resident in the region)
- Business representative (but not a resident in the region)
- Interested community member or volunteer

Question 4

- Importantly 63% of business respondents were primarily tourism sector operators
- Other sectors of the economy were also well-covered

4. What best describes your business/organisation (Pyrenees Shire)
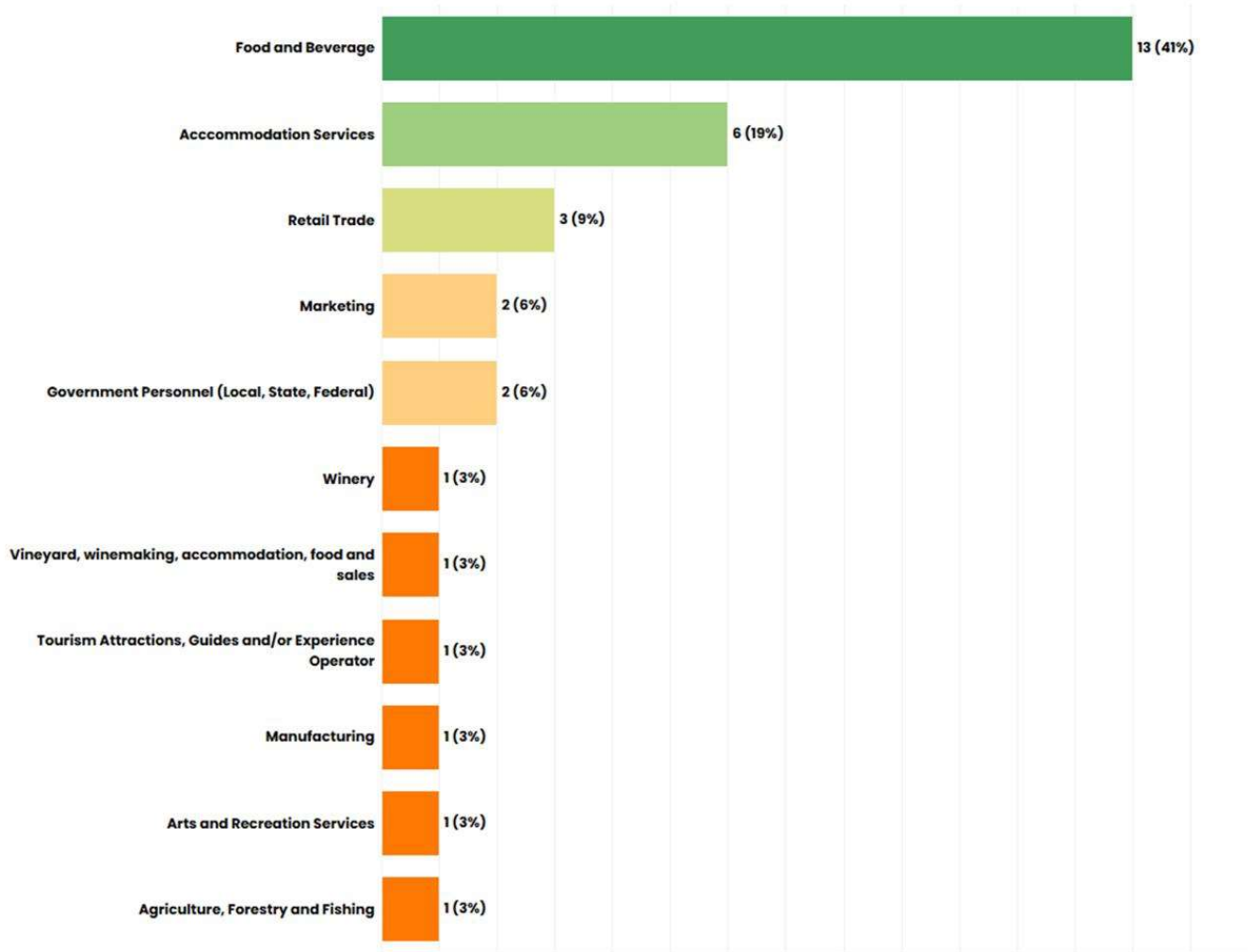
Question 5

- Responses indicate the importance of social media in promoting businesses
- Google map listings (13%) are larger than most other areas
- Just under 10% of businesses are listed on the Australian Tourism Data Warehouse. Good to get this increased
- 10% noted they also promote via the Tourism Midwest Partnership. Good to grow this

5. How is your business/organisation primarily promoted? Select all that apply. (Pyrenees Shire)

Category	Count (%)
Social media (e.g. Facebook, Instagram)	28 (22%)
Mail and email-outs	12 (10%)
ATDW Listing	11 (9%)
Tourism Midwest Partnership	11 (9%)
Google Maps Listing	17 (13%)
Local newspapers/magazines	8 (6%)
Online business directory	6 (5%)
Hard copy marketing (brochures, books, newsletters)	5 (4%)
Digital Marketing (e.g. SEM, online advertising etc)	12 (10%)
Media outside the region	6 (5%)
Local radio	5 (4%)
Media famils	2 (2%)
Other	2 (2%)

Question 6

- Current economic conditions and staffing are the major issues noted
- 11% also felt the region had low awareness and 5% said there was a lack of marketing support
- Government regulations are noted as a major issue as well (especially planning)
- The SDMP and LAAPs will pick up on these and other issues and identify solutions.

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

Issue	Count (%)
Local economic conditions	16 (13%)
Attracting and/or retaining skilled employees	14 (12%)
Low awareness of region	13 (11%)
Labour costs	13 (11%)
Government regulations (e.g. planning, permits, licenses, etc.)	12 (10%)
Lack of marketing skills and training	7 (6%)
Lack of worker housing	6 (5%)
Lack of marketing/promotion support	6 (5%)
Lack of market demand	6 (5%)
Climate related impacts	6 (5%)
Obtaining finance	4 (3%)
Lack of business planning or financial management	4 (3%)
COVID-related impacts	4 (3%)
Lack of space for expansion	3 (3%)
Personal circumstances	2 (2%)
Lack of affordable land and rising insurance and compliance costs	2 (2%)
Attracting and/or retaining volunteers	1 (1%)

Question 7

- Unlike most other areas respondents wanted greater promotion to visitors
- Most want to see new attractions established
- Increase in annual visitation desired
- Support greater promotion of smaller towns
- Improve wayfinding and signage

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

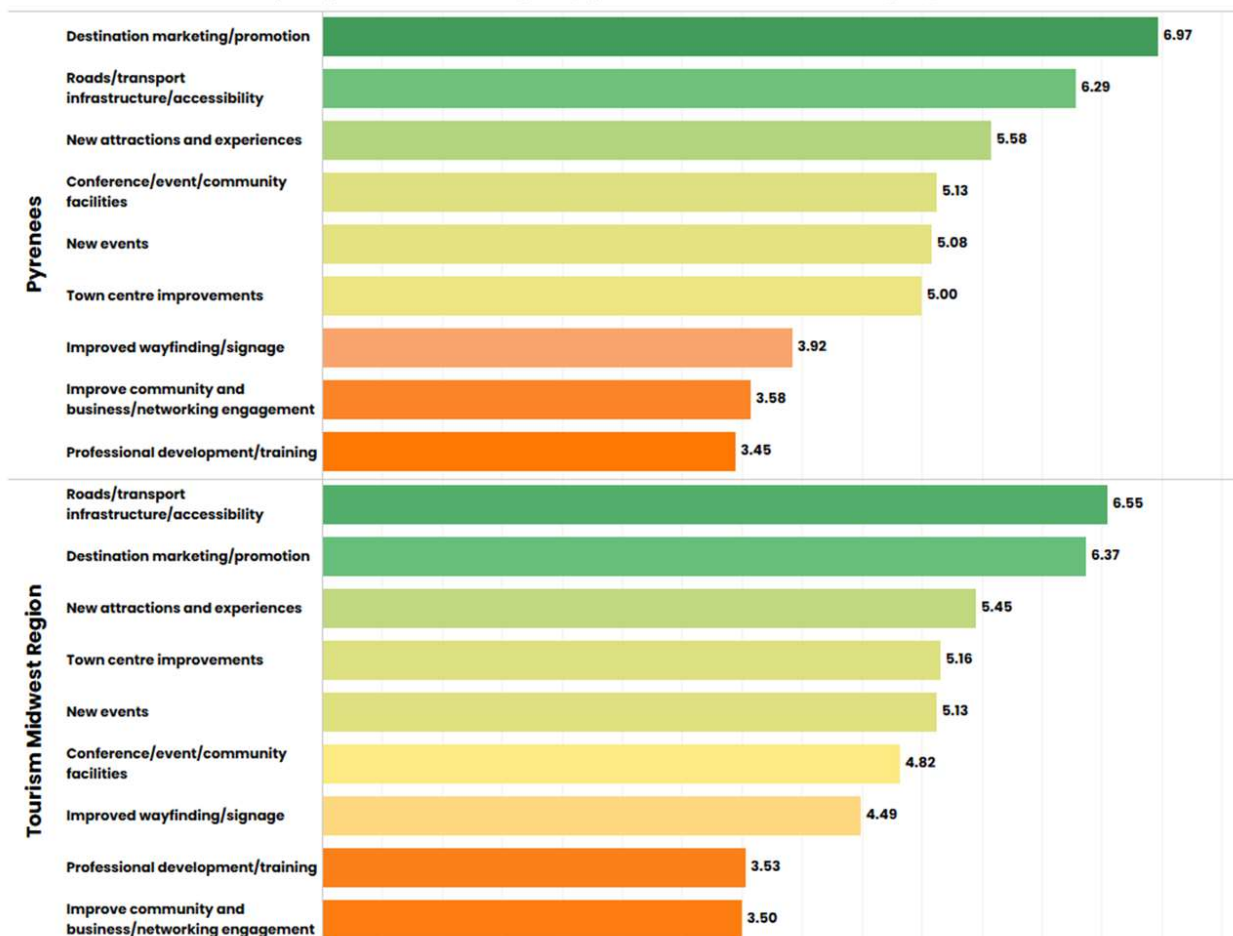| Outcome	Count (%)
Promoting/marketing of the region to visitors	29 (11%)
New attractions and experiences for locals and visitors	28 (10%)
Increase in annual visitation	26 (10%)
Support/promote smaller towns within the region	21 (8%)
Improved wayfinding signage	20 (7%)
Town centre improvements (e.g. street beautification)	19 (7%)
A broader accommodation offering	18 (7%)
Environmentally sensitive development	16 (6%)
Improved visitor amenities/services (e.g. picnic areas, toilet blocks, etc.)	15 (6%)
A more diverse food and beverage offering including more diverse operating hours	14 (5%)
New local events	12 (4%)
Arts and culture development	12 (4%)
Visitor dispersal throughout the region	11 (4%)
Improve community and business networking	11 (4%)
Business/industry support	11 (4%)
Improved conference/events/community facilities	4 (1%)
Improved roads and parking	1 (0%)

-

Question 8

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

- A giant jar of Vegemite. Put Beaufort on the map for road trips. The home of Vegemite already adds a classic Aussie favourite with a Giant Vegemite Jar
- Accommodation in the Pyrenees and dining options in the Pyrenees
- An RACV-style resort in Moonambel
- longer opening hours for the Avoca Information Centre
- accommodation centre/resort with conference facility and restaurant
- Free camping in a better location & with better facilities
- In Beaufort, a local and traveller park facility away from the highway, with toilets, fresh water, and sun/rain shelter.
- More accommodation in Avoca
- More diverse food and beverage offerings particularly in Avoca
- The Cyril Callister Museum - the man who invented Vegemite Lake Goldsmith Steam Rally - Lake Goldsmith

Question 9

- stronger destination marketing was the highest-ranked item
- Improved road infrastructure and public transport
- Introduce new attractions and experiences
- New and refreshed conference and community facilities
- Create new events
- Improve town centres and walkability, signage, parking, lighting, landscaping

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

Pyrenees

Item	Score
Destination marketing/promotion	6.97
Roads/transport infrastructure/accessibility	6.29
New attractions and experiences	5.58
Conference/event/community facilities	5.13
New events	5.08
Town centre improvements	5.00
Improved wayfinding/signage	3.92
Improve community and business/networking engagement	3.58
Professional development/training	3.45

Tourism Midwest Region

Item	Score
Roads/transport infrastructure/accessibility	6.55
Destination marketing/promotion	6.37
New attractions and experiences	5.45
Town centre improvements	5.16
New events	5.13
Conference/event/community facilities	4.82
Improved wayfinding/signage	4.49
Professional development/training	3.53
Improve community and business/networking engagement	3.50

Question 10

- Core values ranking mirrored those for the region overall
- Environmental considerations rated highest similar to most other areas
- Economic development and jobs were next
- Stronger collaboration between public, private and community stakeholders
- Social development important
- First Peoples partnerships and collaboration required

10. Please rank what core values/guiding principles you think should guide sustainable tourism development in the Tourism Midwest. (Pyrenees & Tourism Midwest Region)
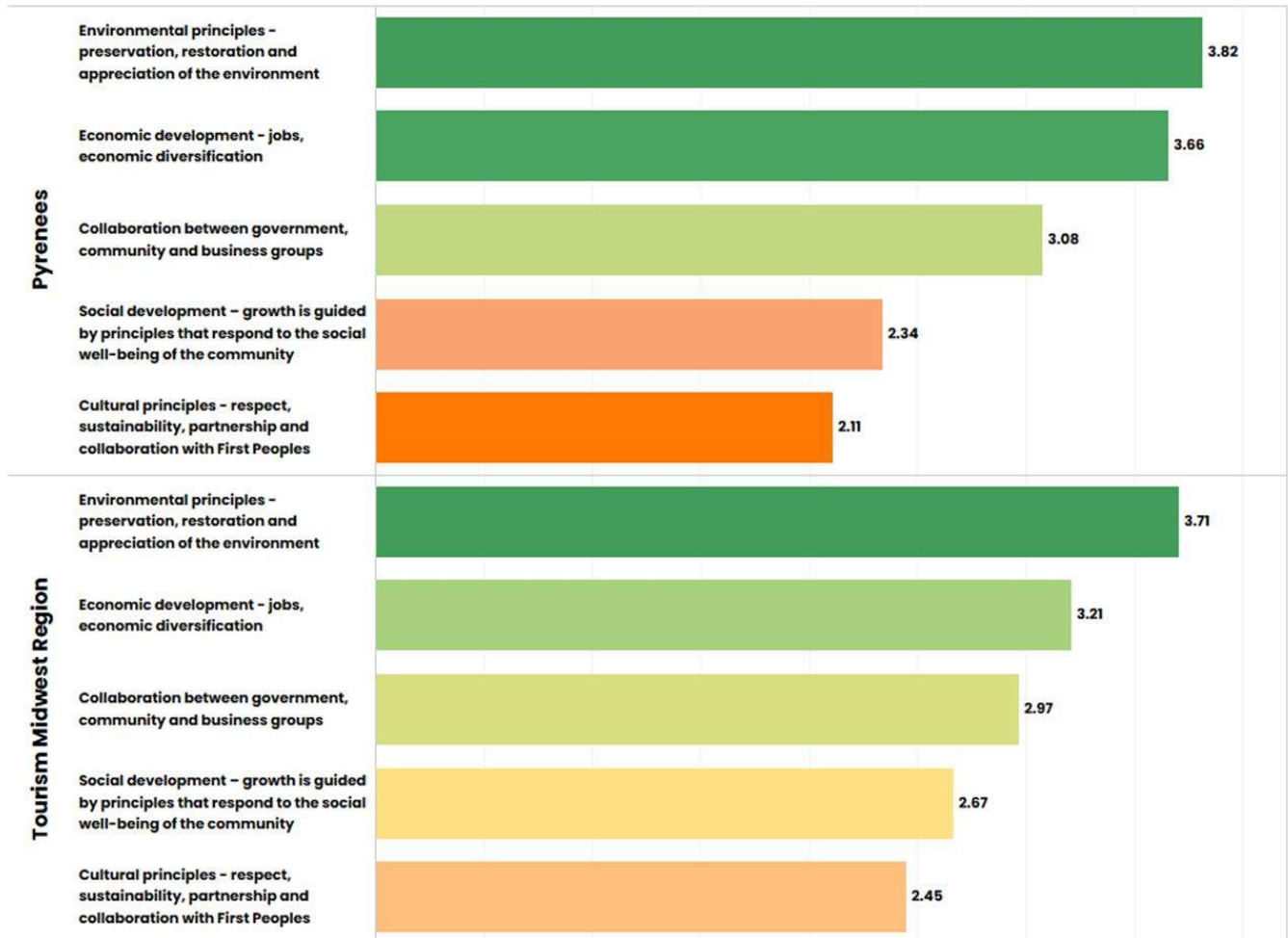
Appendix 2   Glossary

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

Appendix 3 Experience Victoria 2033 Product Priorities and Settings

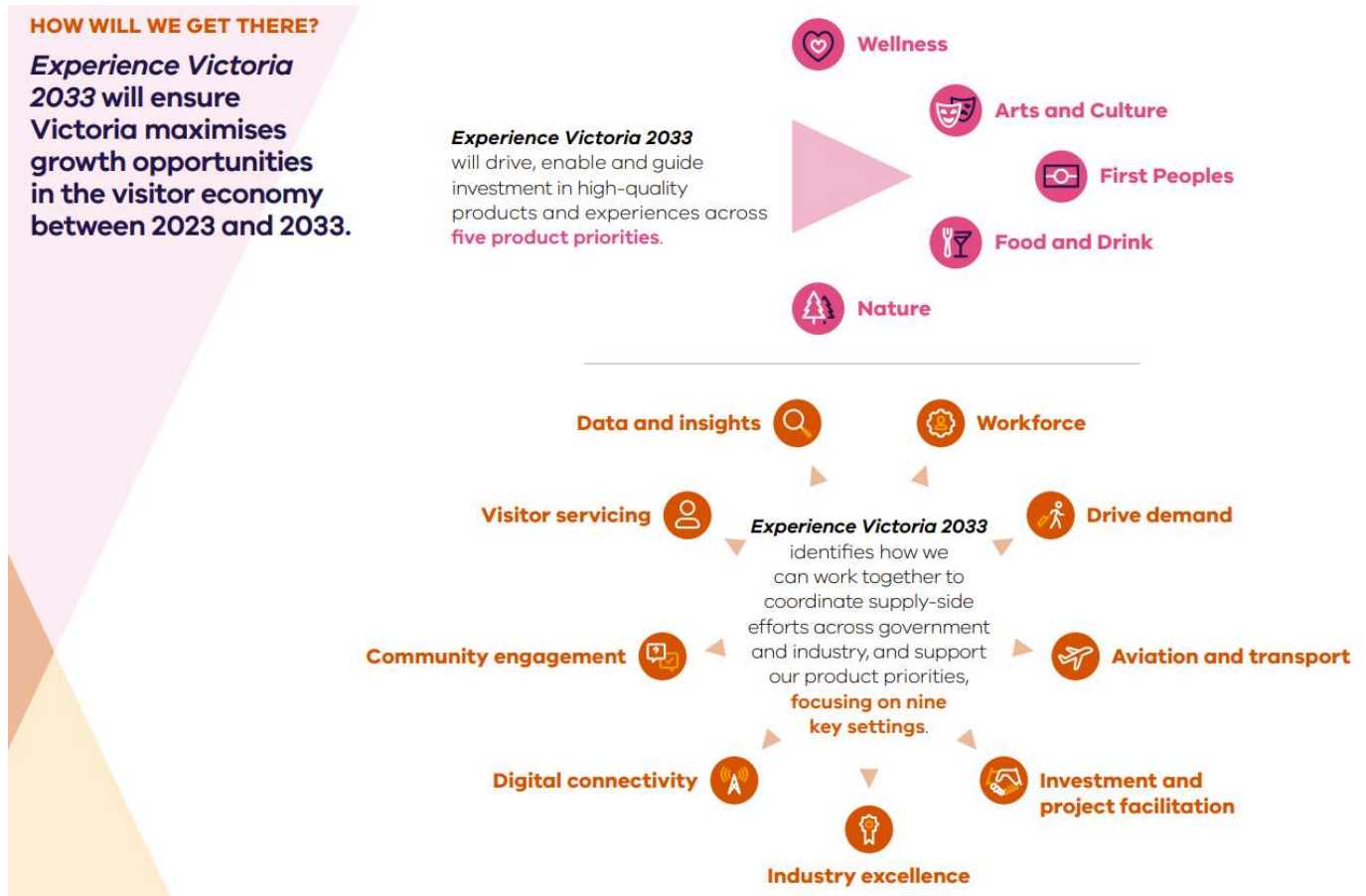Figure 22: Experience Victoria 2033 Product Priorities and Settings[24]

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

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

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[24] Experience Victoria 2033, page 9.

Appendix 4   Visit Victoria Brand Playbook

Figure 23: Regional sub-brand framework - Goldfields[25]

Regional sub-brand framework **Goldfields**			
Visitation drivers	Escape my everyday	Surprise and delight me	Spark my imagination
Victorian Masterbrand promise **Goldfields sub-brand promise**	Enrich every moment in Victoria's rich heartland		
Pillars	**Nature at your fingertips** • Lakes • Hikes and bushwalking trails • Gardens	**Passion for quality** • UNESCO Creative City in the area of Craft and Folk Art, Ballarat • UNESCO Bendigo city and region of gastronomy • Premium food and drink experiences • Wine region and cellar doors • Artisans • Attractions	**Storied culture** • Post-colonial history and architecture and early Chinese culture • First Peoples cultural experiences • Villages and towns • Art galleries and cultural institutions
Proof points	• Lake Wendouree, Lake Weeroona • Mount Buninyong, Mount Alexander Regional Park, La Larr Ba Gauwa Mountain Bike Park • The Goldfields Track • Pink Cliffs Geological Reserve • Rosalind Park	• Masons, Wine Bank of View, Percy and Percy, Long Paddock Cheese, Cabosse and Feve Chocolates, Hop Temple, Restaurant Lola, Mr Jones, Mitchell Harris Wine Bar • Shiraz Republic, Vinea Marson, Balgownie Estate, Blue Pyrenees Estate, Michael Unwin Wines • Lost Trades Fair, Bendigo Pottery, Wooten • White Night, Winter Wonderlights	• Djaara Lights • Bendigo, Ballarat, Castlemaine Heathcote, Bridgewater on Loddon, Harcourt, Talbot • Bendigo Art Gallery, Art Gallery of Ballarat, Castlemaine Art Gallery • The Great Stupa of Universal Compassion
Personality traits	Open-minded	Creative	Intriguing

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[25] Destination Victoria Brand Strategy, page 24.

Appendix 5   NPS calculation

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

The NPS is calculated using a scale (see Figure 24):

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

Tripadvisor and Google[26] use a scale of 1-5 for consumer ratings on accommodation products. Converting this to the NPS scale means that a rating of 1-3 is considered "detractors" for the product, a score of 4 is the product's "passives" and a score of 5 is the product's "promoters".[27] Only product with more than five reviews was included in the NPS assessment to ensure a robust sample size.
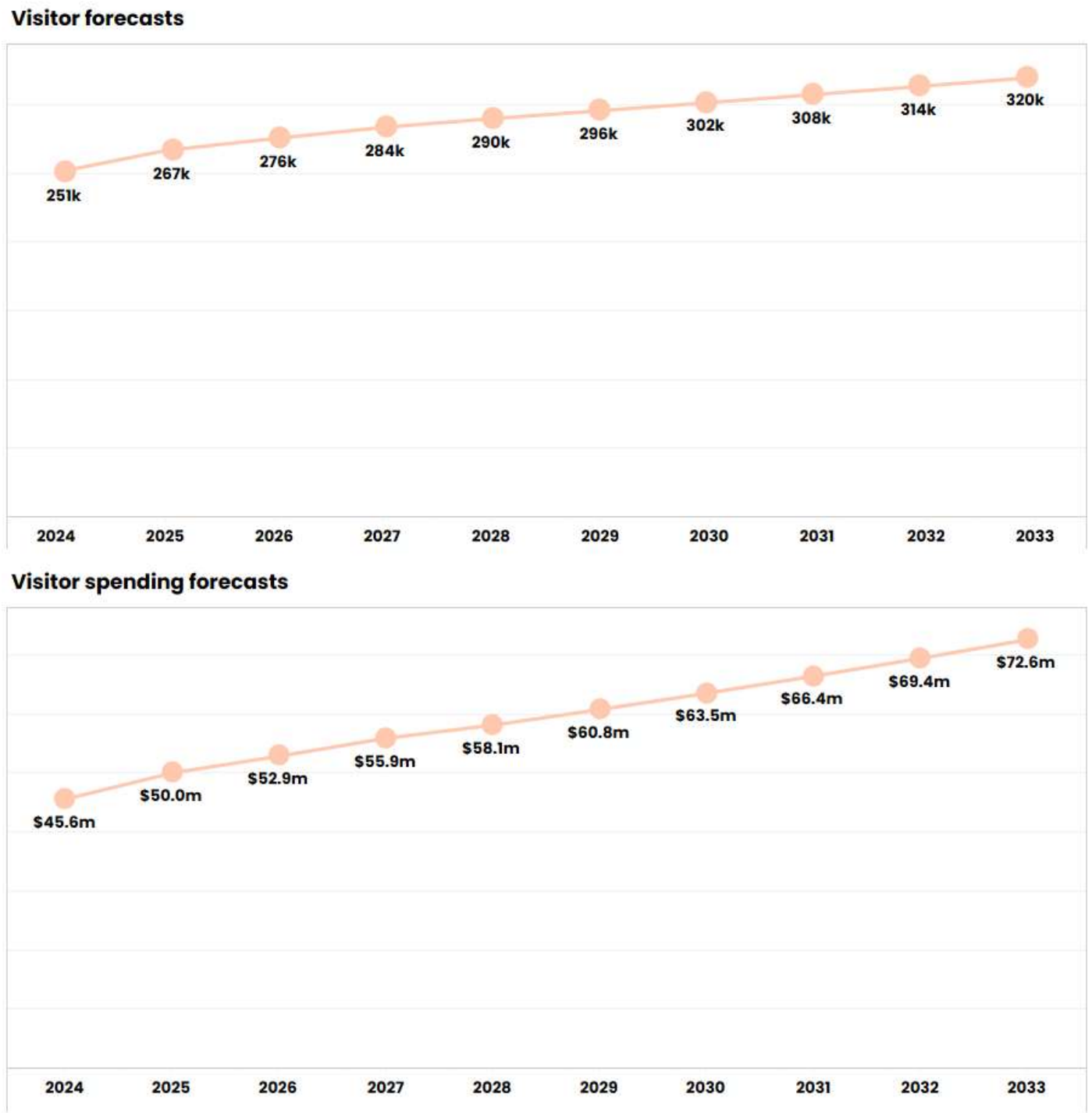
Figure 24: Net Promoter Score scale
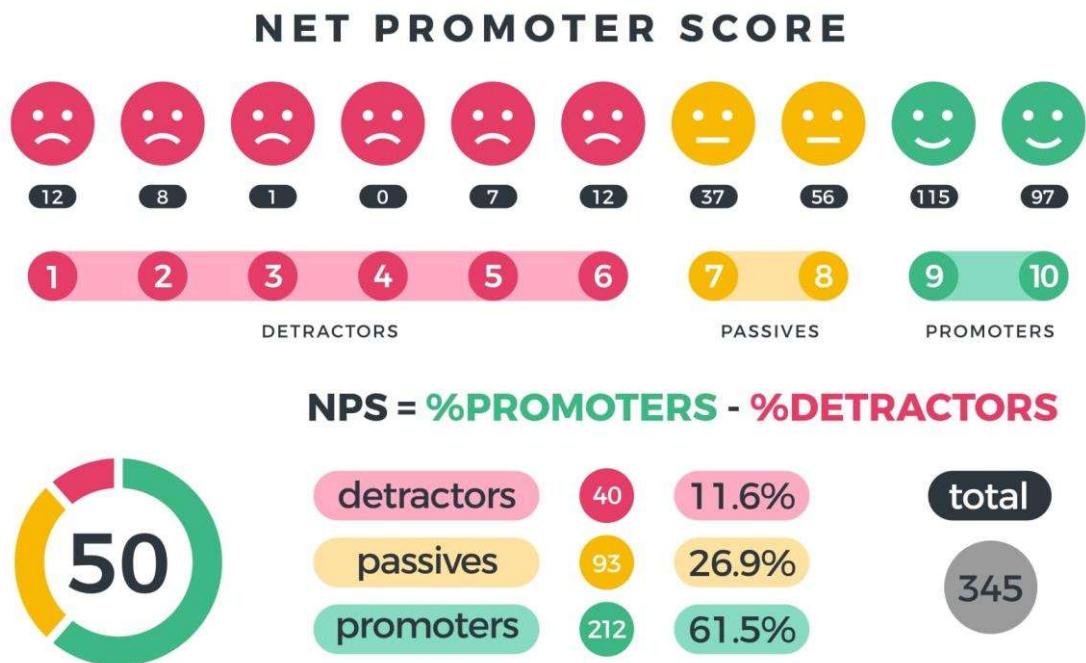
Appendix 6   Visitor forecasts

The following provides forecasts for visitor trips and spending to PSC from 2024 to 2033. The forecasts have been aligned with the tourism forecasts for Victoria[28].

Figure 25: Visitor forecasts, 2024–2033[29]

Visitor forecasts

Visitor spending forecasts

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[28] Tourism Forecasts for Victoria, Department of Jobs, Skills, Industry and Regions (https://tourism.vic.gov.au/__data/assets/pdf_file/0007/2233942/Victorias-Tourism-Forecast-for-2023-to-2028.pdf)

[29] Derived by Stafford based on historic data from Tourism Research Australia (National and International Visitor Surveys) and COVID-19 recovery forecasts.