

# GREATER GEELONG AND THE BELLARINE TOURISM DEVELOPMENT PLAN

FINAL REPORT 2019-22

FEBRUARY 2019

TOURISM GREATER GEELONG & THE BELLARINE

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

[www.urbanenterprise.com.au](http://www.urbanenterprise.com.au)

## **AUTHORS**

Mike Ruzzene

Danielle Cousens

Agathy Patsouris

## **Urban Enterprise**

**Urban Planning, Land Economics, Tourism Planning & Industry Software**

Level 1 302-304 Barkly Street, Brunswick VIC 3056

(03) 9482 3888

[www.urbanenterprise.com.au](http://www.urbanenterprise.com.au)

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## ACRONYMS

**IVS** – International Visitor Survey

**LGA** – Local Government Authority

**NVS** – National Visitor Survey

**TRA**– Tourism Research Australia

**VFR** – Visiting Friends and Relatives

## GLOSSARY OF TERMS

**Domestic day trip visitors** – Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

**Domestic overnight visitors** – People aged 15 years and over who undertake an overnight trip of one night or more, and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

**International visitor** – A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

# EXECUTIVE SUMMARY

## INTRODUCTION

Urban Enterprise was commissioned by *Tourism Greater Geelong & The Bellarine* to undertake the Greater Geelong and The Bellarine Tourism Development Plan 2019-22. This report builds on the 2015-18 tourism development plan. The aim of the plan is to identify key tourism product and supporting infrastructure which will meet the needs of existing and future visitors to the region. The projects that are identified in this plan will support tourism and economic growth in the region.

## THE REGION

Greater Geelong and the Bellarine is located to the south west of Melbourne and includes the Local Government Areas of Greater Geelong, Borough of Queenscliffe and part of Golden Plains Shire. The region is contributed of diverse tourism product and experiences across various Greater Geelong and Bellarine subregions:

- Geelong Urban;
- Avalon and the You Yangs;
- Golden Plains South;
- Bellarine North;
- Bellarine South;
- Queenscliff and Point Lonsdale.

Greater Geelong and the Bellarine is also strategically located in proximity to other key Victorian destinations including links to the Mornington Peninsula via the Queenscliff Sorrento Ferry, Surf Coast and the Great Ocean Road. The development of Avalon International Airport will strengthen the attraction of international visitors and make the region a key hub for exploring Victoria's tourism offer.

## TOURISM PROFILE

| Visitation           | Economic Value of Tourism Industry (Output) | Jobs Attributed to Tourism Industry |
|----------------------|---|-------------------------------------|
| 5.8 million visitors | \$2.2 Billion                               | 11,264                              |

The Greater Geelong and the Bellarine region attracted 5.8 million visitors in 2018, comprised of 2.3 million overnight visitors and 3.5 million daytrip visitors.

Over 50% of visitation is to the Geelong Urban subregion, with 77% of visitors to Geelong Urban visiting for a daytrip. This is likely due to a large number of people visiting for business, shopping, healthcare and friends and relatives.

The region is dominated by day trip visitors, due to the proximity to Melbourne. Lower proportions of overnight visitors to the Avalon & the You Yangs, Golden Plains South and Geelong Urban regions are likely due to a combination of factors, including limited accommodation product, large visiting business market and large VFR market.

Over the past 10 years, overnight visitation to the Geelong and Golden Plains South region has continued to grow, while overnight trip visitation to the Bellarine Peninsula has had very limited growth. This could be due to conversion of holiday homes to permanent dwellings, competition from other beachside destinations like Mornington Peninsula and the Surf Coast, and a lack of investment in accommodation.

Tourism provides a significant contribution to the regional economy, calculated by visitor expenditure. Overall, visitor expenditure (estimated at \$1.1 billion) generates substantial economic benefits for the Greater Geelong and Bellarine Region including economic output of \$2.2 billion and 11,264 jobs.



## MARKET PROFILE

99% of visitors to the Greater Geelong and The Bellarine region are from Victoria, with 71% of these visitors from Melbourne.

Domestic visitation to the Bellarine is much more seasonal than visitation to Geelong and Golden Plains South, likely due to a larger holiday visitor market and lower VFR market.

There is a significantly higher proportion of people staying with friends and relatives in the Greater Geelong and The Bellarine region than other similar coastal locations. Similarly, there is a much higher proportion of people travelling for the purpose of visiting friends and relatives. This is influenced by the large resident population in the region.

A higher proportion of visitors ate out at a restaurant/café than competing coastal destinations and visitors to regional Victoria. Similarly, a higher proportion of visitors took part in paid experiences/activities (e.g. shopping, visiting markets) than similar coastal destinations and Regional Victoria.

75% of visitors to the Bellarine Peninsula went to the beach, which is significantly higher than visitors to similar coastal regions. This also highlights the need for continued diversification of product in the region including investment in nature based tourism experiences, food, wine and ferments product.

International visitors are a key, growing market for the region, with international students and their visiting family and friends a key market segment. There is significant opportunity to better promote the region to these visitors, as well as opportunity to capture international travellers inbound to Avalon Airport and convert them into daytrip or overnight visitors.

Key target markets for the Greater Geelong and The Bellarine region are the lifestyle leader and MetroTech markets, as well as the traditional family life.

## PRODUCT AND TOURISM DEVELOPMENT

Greater Geelong and The Bellarine has primary strengths in nature-based attractions. These attractions are predominantly centred on Port Phillip Bay and the

ocean beaches to the south. The water-based assets of the region act as a key motivator for visitation, particularly in the peak summer season.

The other area of primary strength is in events and festivals with Geelong hosting numerous sporting and recreation events, some of global significance. The Australian International Air show, Cadel Evans Great Ocean Road Race and Meredith Music Festival are examples of high-profile events held in the region.

The region also has primary strengths in food and beverage as well as arts and culture. Geelong is the only city in Australia that has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN).

There is limited hotel/motel style accommodation in Geelong Urban for the events market (business, sporting and food). Development of 4-5-star quality accommodation is a key opportunity for Geelong Urban and will support the proposed investment in the Geelong Convention and Exhibition Centre.

There is very limited commercial guestroom accommodation in Bellarine North and Bellarine South (20% and 34% respectively). This presents a strong opportunity to grow overnight visitation in the region.

Key new investments since 2015 include development of Avalon international air terminal, Flying Brick Cider Co, Curlewis Golf Club redevelopment including the Range, 360Q restaurant and several small high-end boutique accommodation offers. Further to this, the QTrain and several high-end profile restaurants have strengthened the regions food and beverage offering.

## TRANSPORT AND ACCESS

The Greater Geelong and The Bellarine region is well serviced by a range of transport infrastructure. The region is accessible by air, sea, rail and road.


There are however a number of gaps in the transport links and improvements that require investment to improve visitor access and potentially grow visitation to the region. This includes:

- Investment in rail linkages to Avalon Airport and attraction of further international carriers;

- High-speed rail proposals;
- Completion of Portarlington Harbour redevelopment; and
- Investment in the Queenscliff – Sorrento Ferry terminal.

### PRODUCT STRENGTHS OF GEELONG AND THE BELLARINE

In the following table, product strengths for Greater Geelong and the Bellarine region have been identified and benchmarked against similar coastal locations.

| PRODUCT   | GEELONG & THE BELLARINE | MORNINGTON PENINSULA | PHILLIP ISLAND | SURF COAST |
|---|-------------------------|----------------------|----------------|------------|
| Food & Wine   | ●                       | ●                    | ●              | ●          |
| Spa & Wellbeing   | ●                       | ●                    |                | ●          |
| Wildlife  | ●                       | ●                    | ●              | ●          |
| Nature-based  | ●                       | ●                    | ●              | ●          |
| Arts & Culture  | ●                       | ●                    |                |            |
| Indigenous  |                         |                      |                | ●          |
| Golf  | ●                       | ●                    |                | ●          |
| Adventure   |                         |                      |                | ●          |
| History & Heritage  | ●                       |                      |                | ●          |
| Festivals & Events  | ●                       | ●                    | ●              | ●          |
| Business Events   | ●                       | ●                    | ●              |            |
|  |                         |                      |                |            |

### PROJECTED VISITATION GROWTH AND DEMAND FOR ACCOMMODATION

Urban Enterprises demand modelling for future visitation utilises four scenarios including, historic visitation, Visit Victoria forecasting, population growth rate and Tourism Research Australia forecasts. The mid-point forecast of these scenarios shows that visitation to Greater Geelong and the Bellarine is projected to increase from 5.8 million visitors in 2018 to 7.5 million visitors by 2027.

Utilising this forecast, there will be a need to deliver an additional 1564 guest rooms in the Geelong and Bellarine region to ensure that the region’s tourism potential is met.

To meet projected need from overnight visitors investment in accommodation should occur in the following:

- Boutique guest house and self-contained accommodation
- Quality contemporary budget accommodation
- Large self-contained accommodation/ serviced apartments
- Boutique hotels
- 4.5-5 star branded hotels
- Caravan and camping ground/tourist park
- Integrated Resort
- Experiential accommodation:
  - Quality Farm Stay
  - Golf Course
  - Wineries
  - Nature-based

**GREATER GEELONG AND THE BELLARINE PRIORITY TIER 1 PROJECTS**

| Geelong Urban  | Queenscliff and Point Lonsdale   | Bellarine South  | Bellarine North   | Golden Plains South   | Avalon and the You Yangs  |
|--|--|--|---|---|---|
| <p>Geelong Convention and Exhibition Centre</p> <p>Waterfront Geelong – Safe Harbour Precinct</p> <p>Fast rail to Geelong</p> <p>Cruise ship infrastructure (Cunningham Pier)</p> <p>Osborne Park Precinct redevelopment</p> <p>Geelong Cultural Precinct redevelopment (boutique hotel)</p> <p>GMHBA/Kardinia Park Redevelopment (hotel development)</p> <p>Development of Eastern Beach spa complex</p> <p>Skyrig Adventure Park</p> <p>4-5 star large branded hotel accommodation</p> <p>Contemporary experiential accommodation.</p> <p>Geelong Port Phillip Ferry Service</p> | <p>Borough of Queenscliffe investment into Tracks and Trails</p> <p>Borough of Queenscliffe foreshore improvements</p> <p>Hesse Street revitalisation</p> <p>Development of Fort Queenscliff</p> <p>Ferry terminal upgrade</p> <p>Bellarine Railway Masterplan</p> <p>Events/Culture</p> | <p>Barwon River parklands project</p> <p>Lake Connewarre nature-based tourism masterplan</p> <p>Barwon coast masterplans</p> <p>Barwon coast trail</p> <p>Barwon Coast group accommodation project</p> <p>Off-peak events program</p> <p>Nature-based resort development</p> | <p>Portarlington Safe Harbour (incl. precinct development)</p> <p>Underwater Dive Gallery – ‘Sunken Gallery’</p> <p>Aquaculture experiences</p> <p>Development of large resort at Curlewis golf club</p> <p>Development of self-contained apartment/hotel accommodation at Portarlington</p> <p>Development of branded tourist parks</p> <p>Development of new experiential accommodation</p> <p>Wellness centre with accommodation</p> | <p>Reticulated Sewerage Investment</p> <p>Lethbridge Airport</p> <p>Telecommunications infrastructure</p> <p>Grow the Moorabool Valley Taste Trail</p> <p>Bannockburn Civic Heart project</p> <p>Living Moorabool Trail</p> | <p>Avalon Airport rail link</p> <p>Implementation of Avalon Airport Masterplan</p> <p>Development of accommodation at Avalon Airport.</p> <p>You Yang’s/Serendip Masterplan</p> |

# 1. INTRODUCTION

## 1.1. BACKGROUND

Urban Enterprise was commissioned by *Tourism Greater Geelong & The Bellarine* to undertake the Greater Geelong and The Bellarine Tourism Development Plan 2019-22. This report builds on the 2015-18 tourism development plan.

The Tourism Development Plan 2019-22 will deliver the following:

- Identification of existing and potential target markets, quantification of those markets and projection of key markets into the future;
- Identification of the economic value of tourism in the region;
- Audit of tourism product, experience and infrastructure in the region and identification of gaps to meet market need;
- Analysis of specific tourism opportunities, constraints and visitor experience at a sub region or destination level; and
- Identifying tourism product and infrastructure needs by location to be incorporated into future strategic planning and planning policy.

## 1.2. APPROACH



### STAGE 1: PROJECT INCEPTION AND BACKGROUND

At the outset of the project, Urban Enterprise undertook an inception meeting and review of relevant information and strategies. This included agreement on the scope of works and consultation strategy.

### STAGE 2: DETAILED VISITOR MARKET ANALYSIS

Urban Enterprise undertook an assessment of visitation trends and visitor profiles for Greater Geelong and The Bellarine region, drawing on data collected from Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS). Urban Enterprise's PAVE model has been used to estimate total region visitation, which better accounts for visitation driven by the holiday home sector than traditional National and International Visitor Survey data.

Trend and demographic data for domestic visitors and overnight international visitors to the region provided insights on visitor market trends and preferences across the region and enabled the analysis of the visitor market profile matched to the identified target market segments and tourism product/infrastructure opportunities.

### STAGE 3: CONSULTATION

To gather an understanding of the issues and opportunities within the region, as well as within each locality, Urban Enterprise undertook a series of consultations relevant stakeholders, whose input informed this study.

Consultations took place with Greater Geelong City Council, Golden Plains Shire, Borough of Queenscliffe, Regional Development Victoria and a selection of stakeholders to inform the plan.

#### STAGE 4: PRODUCT AND EXPERIENCE UPDATE

Compiling a comprehensive database of tourism businesses, organisations and attractions across the region, Urban Enterprise's product audits enabled the identification of product strengths, gaps, constraints and development opportunities for the region.

Product categories analysed included: accommodation, natural attractions, history and heritage attractions, tours, farm gate produce, wineries, golf and recreation, infrastructure, arts, and culture, events and festivals, conference facilities, and destination dining venues and experiences.

The product audit also enabled identification of six destination sub-regions, including Urban Geelong, Avalon and the You Yangs, Golden Plains South, Bellarine South, Bellarine North, and Queenscliff and Point Lonsdale, each offering different product strengths. The sub-regions were designed to be compatible with the Australian Bureau of Statistic's SA2 boundaries and are shown in the adjacent map.

#### STAGE 5: REPORT PHASE

The Tourism Development Plan has been prepared drawing on research and consultation as outlined above.

### 1.3. THE REGION

Greater Geelong and the Bellarine is located to the south west of Melbourne and includes the Local Government Areas of Greater Geelong, Borough of Queenscliffe and part of Golden Plains Shire. The region is contributed of diverse tourism product and experiences across various Greater Geelong and Bellarine subregions:

- Geelong Urban;
- Avalon and the You Yangs;
- Golden Plains South;
- Bellarine North;
- Bellarine South;
- Queenscliff and Point Lonsdale.

These are shown in Figure 1 on the following page.

Greater Geelong and the Bellarine is also strategically located in proximity to other key Victorian destinations including links to the Mornington Peninsula via the Queenscliff Sorrento Ferry, Surf Coast and the Great Ocean Road. The development of Avalon International Airport will strengthen the attraction of international visitors and make the region a key hub for exploring Victoria's tourism offer.

### 1.4. REPORT STRUCTURE

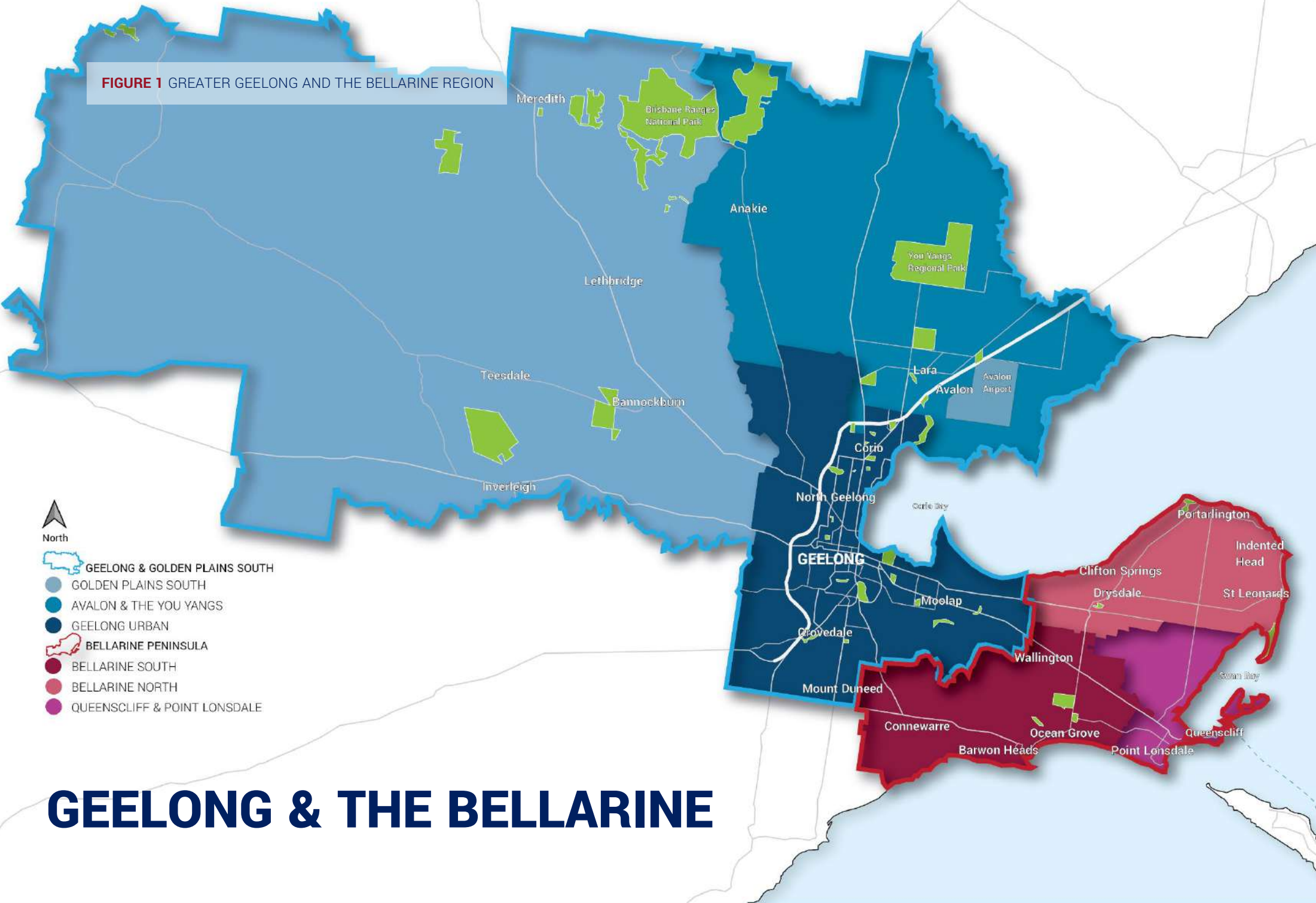
This report has been prepared in the following sections:

- Part A: Regional Tourism Assessment: A profile of visitation and product in the region;
- Part B: Sub Regional Profiles: Profiles of each sub region and product opportunities for each; and
- Part C: Prioritisation and Project Profiles.

**FIGURE 1** GREATER GEELONG AND THE BELLARINE REGION



- GEELONG & GOLDEN PLAINS SOUTH
- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE PENINSULA
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE



# GEELONG & THE BELLARINE



# **PART A**

## **REGIONAL TOURISM ASSESSMENT**

## 2. PROFILE OF TOURISM IN GREATER GEELONG AND THE BELLARINE

### 2.1. INTRODUCTION

This section provides a profile of tourism visitation to Greater Geelong and The Bellarine region, including daytrip visitation and domestic and international overnight visitation, trend analysis, forecasted visitation for the region, and a discussion on the economic impact of tourism to the region.

Total region visitation data has been prepared using Urban Enterprises PAVE model which better accounts for visitation driven by the holiday home sector than traditional NVS and IVS data. See Appendix A for further detail on the PAVE model.

For data analysis purposes, the Greater Geelong and the Bellarine region has been split into two regions; Geelong and Golden Plains South (including Avalon), and the Bellarine Peninsula. This is both to increase reliability of data due to the low visitation sample size of Golden Plains South and Avalon and the You Yangs, and because of the similarity in product and experience profile of the destinations within each region.

### 2.2. KEY FINDINGS

| Visitation           | Economic Tourism (Output) | Value of Industry | Jobs Attributed to Tourism Industry |
|----------------------|---------------------------|-------------------|-------------------------------------|
| 5.8 million visitors | \$2.2 Billion             |                   | 11,264                              |

**The Greater Geelong and the Bellarine region attracted 5.8 million visitors in 2018, comprised of 2.3 million overnight visitors and 3.5 million daytrip visitors.**

**Over 50% of visitation is to the Geelong Urban subregion, with 77% of visitors to Geelong Urban visiting for a daytrip. This is likely due to a large number of people visiting for business, shopping, healthcare and friends and relatives.**

**The region is dominated by day trip visitors, due to the proximity to Melbourne. Lower proportions of overnight visitors to the Avalon & the You Yangs, Golden Plains South and Geelong Urban regions are likely due to a combination of factors, including limited accommodation product, large visiting business market and large VFR market.**

**Over the past 10 years, overnight visitation to the Geelong and Golden Plains South region has continued to grow, while overnight trip visitation to the Bellarine Peninsula has had very limited growth. This could be due to conversion of holiday homes to permanent dwellings, competition from other beachside destinations like Mornington Peninsula and the Surf Coast, and a lack of investment in accommodation.**

**Tourism provides a significant contribution to the regional economy, calculated by visitor expenditure. Currently, visitor expenditure (estimated at \$1.1 billion) generates substantial economic benefits for the Greater Geelong and Bellarine Region including economic output of \$2.2 billion and 11,264 jobs.**



As visitation grows over time, the economic impact is expected to increase accordingly. By 2027, visitation is projected to increase to 7.5 million, generating \$1.7 billion in visitor expenditure. This is estimated to increase the economic impact for the Region, with economic output projected at \$3.3 billion and job creation projected at 17,256.

### 2.3. VISITATION

Urban Enterprise’s PAVE model for tourism visitation estimates that Greater Geelong and the Bellarine region attracted over 5.8 million visitors in 2018, including 3.5 million daytrip visitors and 2.3 million overnight visitors.

The Geelong Urban subregion had the highest total visitation across the region, with an estimated 3 million visitors. This was driven by the significantly larger daytrip market than the other subregions.

Geelong Urban also had the greatest overnight visitation for the region, at 659,406 overnight visitors. The overnight visitor market was also strong in Bellarine North, with 566,741 overnight visitors, and Bellarine South, with 574,099 overnight visitors.

It should be noted that arrivals and departures at Avalon Airport are not accounted for in the Avalon/You Yangs sub region.

**TABLE 1** PAVE VISITATION NUMBER

| VISITATION ESTIMATES - PAVE MODEL                      | VISITATION       |
|--|------------------|
| Number of Visitors Staying with Friends and Family     | 568,894          |
| Number of Visitors Staying in Holiday Homes            | 683,336          |
| Number of Visitors Staying in Commercial Accommodation | 586,144          |
| Number of Visitors Staying in Caravan Parks            | 488,990          |
| Number of Visitors Staying in Paid Accommodation       | 1,075,134        |
| Total Number of Overnight Visitors                     | 2,327,365        |
| Total Number of Daytrip Visitors                       | 3,459,640        |
| <b>Total Number of Visitors</b>                        | <b>5,787,005</b> |

Source: Urban Enterprise, 2018.

Geelong Urban drives more than one half of total visitation to the region, however the majority of these visitors are day-trippers. The Bellarine Peninsula including Bellarine North, Bellarine South and Queenscliff and Point Lonsdale attracts significantly more overnight visitors than Urban Geelong – over 1.5 million overnight visitors. A large proportion of overnight visitation is generated by people staying in holiday homes or staying with friends and family.



FIGURE 2 OVERNIGHT VISITATION

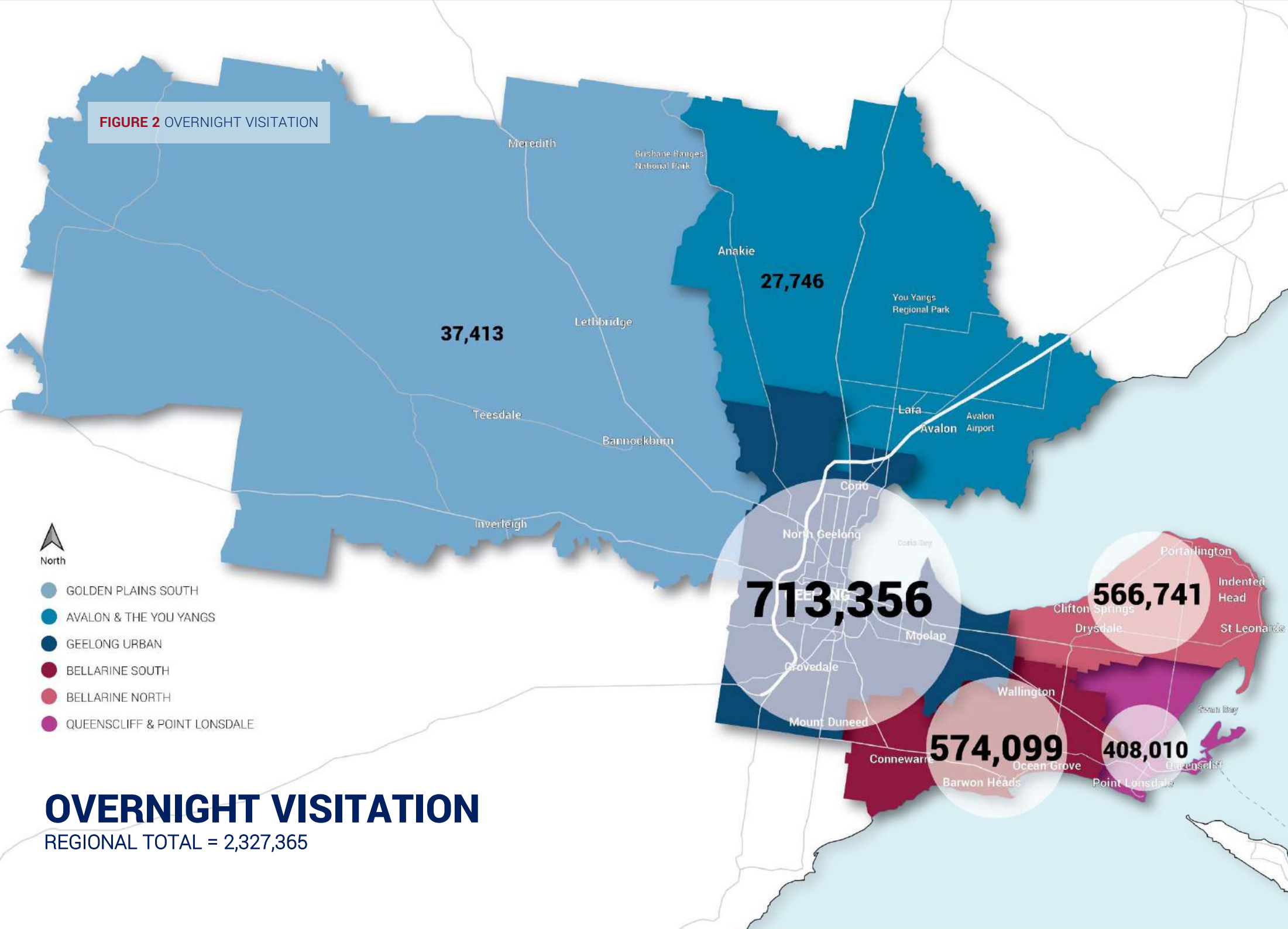


North

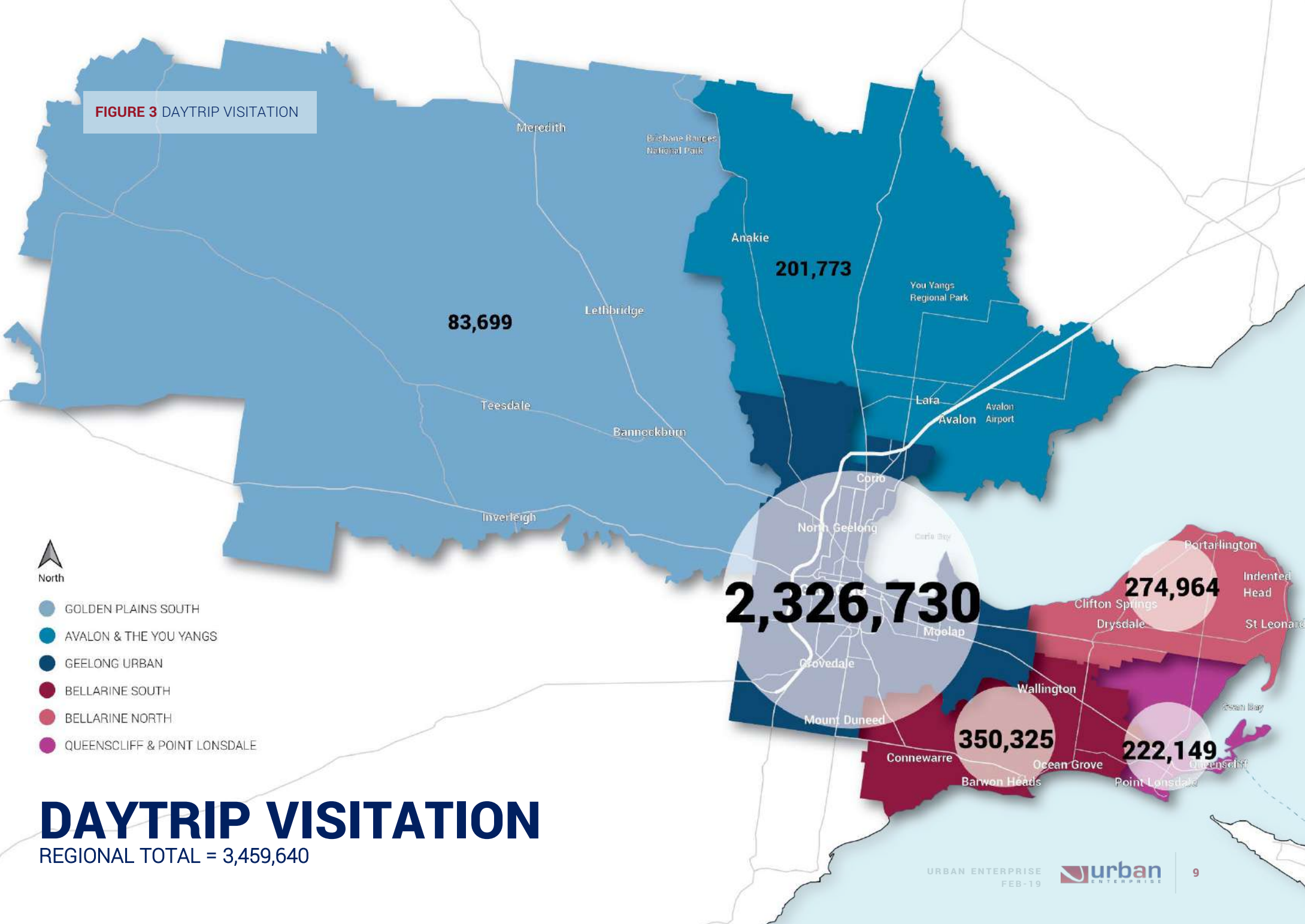
- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# OVERNIGHT VISITATION

REGIONAL TOTAL = 2,327,365



**FIGURE 3** DAYTRIP VISITATION



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# DAYTRIP VISITATION

REGIONAL TOTAL = 3,459,640

FIGURE 4 TOTAL VISITATION

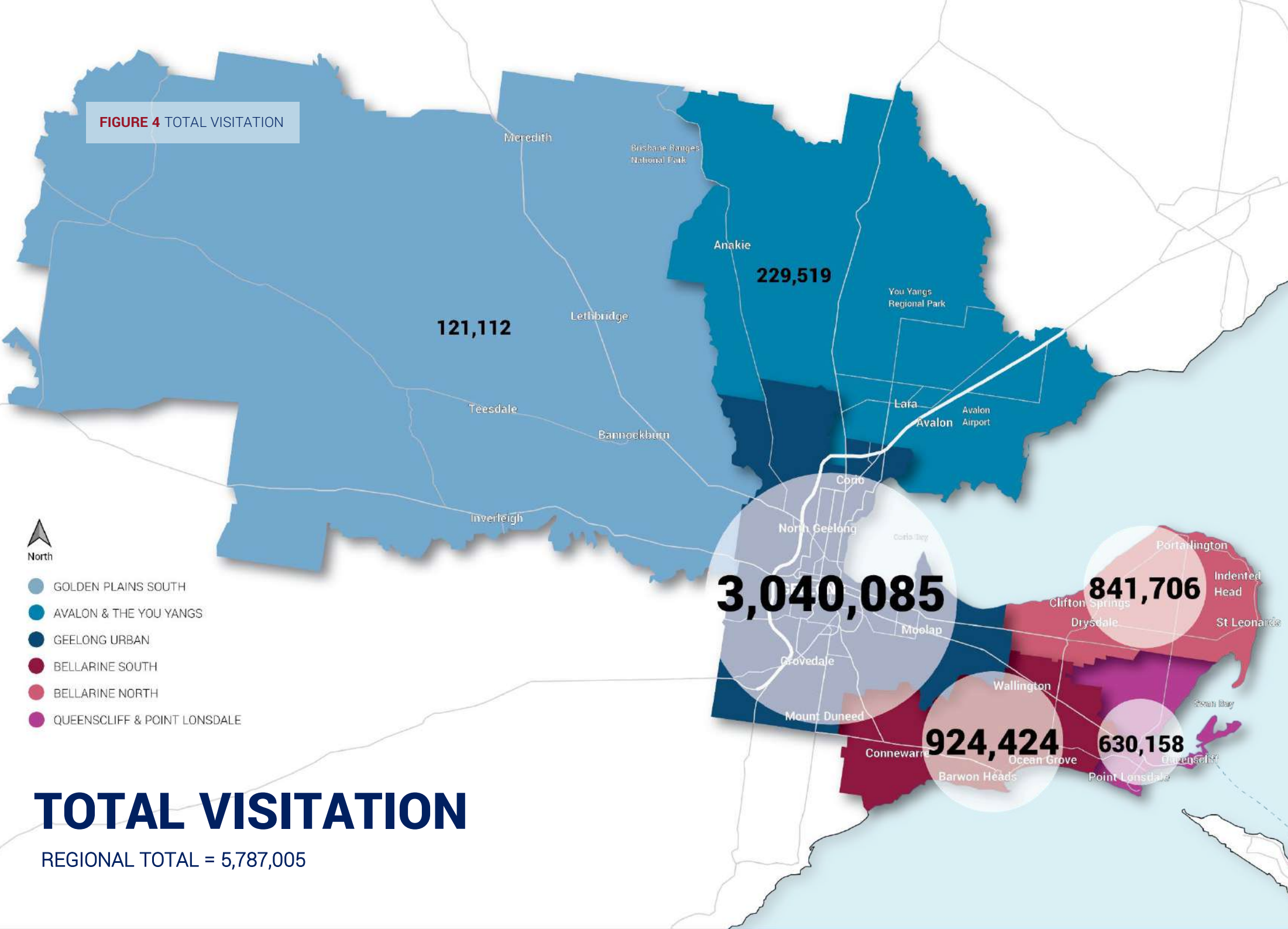


North

- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# TOTAL VISITATION

REGIONAL TOTAL = 5,787,005



## 2.4. TRENDS IN VISITATION

Table 2 shows the growth in visitation in each subregion over the past 3 years, using Urban Enterprise's PAVE model. Visitation to the Greater Geelong and the Bellarine region has grown by 5% per year on average. Daytrip visitation to the region has grown by 7%, with overnight visitation growing by only 3%.

There has been very little growth in overnight visitation in Queenscliff & Point Lonsdale (1%) and Bellarine North (1%). The most significant growth in overnight trips has been in Golden Plains South (17% p/a) and Avalon & the You Yangs (9% p/a), which may be connected to the significant VFR market.

There has been no growth in day trip visitation to Queenscliff & Point Lonsdale and very little growth in visitation to Golden Plains South (2% p/a), indicating limited investment in tourism product and little promotion of existing product.

Geelong has continued to grow steadily, with a total visitation growth rate of 6% per annum. Overall, Avalon and the You Yangs has experienced the greatest overall growth in visitation (13%), which could be attributed to the recent development of an international terminal and the attraction of Air Asia flights.

**Geelong and the Bellarine Region grew substantially over the period 2015-2018, with an additional 840,000 visitors to the region. The majority of this growth occurred in daytrip visitors to Geelong Urban and the Bellarine Peninsula. Queenscliff and Point Lonsdale, however experienced little visitation growth. There are a number of reasons for the limited growth in Queenscliff and Point Lonsdale, this includes:**

- Lower interest in static heritage product from key visitors markets;
- Lack of investment in contemporary visitor product and experiences;
- Static population growth compared to other areas, affecting VFR market;
- Static accommodation supply.

TABLE 2 OVERNIGHT TRIPS

| OVERNIGHT VISITATION                  |                  |                   |                            |
|---------------------------------------|------------------|-------------------|----------------------------|
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 398,582          | 408,010           | 1%                         |
| Bellarine North                       | 542,251          | 566,741           | 1%                         |
| Bellarine South                       | 513,125          | 574,099           | 4%                         |
| Avalon & You Yangs                    | 21,289           | 27,746            | 9%                         |
| Geelong Urban                         | 659,406          | 713,356           | 3%                         |
| Golden Plains South                   | 23,157           | 37,413            | 17%                        |
| <b>Geelong &amp; Bellarine region</b> | <b>2,157,811</b> | <b>2,329,382</b>  | <b>3%</b>                  |
| DAY TRIP VISITATION                   |                  |                   |                            |
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 225,310          | 222,149           | 0%                         |
| Bellarine North                       | 229,734          | 274,964           | 6%                         |
| Bellarine South                       | 264,544          | 350,325           | 10%                        |
| Avalon & You Yangs                    | 135,988          | 201,773           | 14%                        |
| Geelong Urban                         | 1,860,030        | 2,326,730         | 8%                         |
| Golden Plains South                   | 78,754           | 83,699            | 2%                         |
| <b>Geelong &amp; Bellarine region</b> | <b>2,796,375</b> | <b>3461658.26</b> | <b>7%</b>                  |
| TOTAL VISITATION                      |                  |                   |                            |
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 623,892          | 630,158           | 0%                         |
| Bellarine North                       | 771,985          | 841,706           | 3%                         |
| Bellarine South                       | 777,669          | 924,424           | 6%                         |
| Avalon & You Yangs                    | 157,277          | 229,519           | 13%                        |
| Geelong Urban                         | 2,519,437        | 3,040,085         | 6%                         |
| Golden Plains South                   | 101,911          | 121,112           | 6%                         |
| <b>Geelong &amp; Bellarine region</b> | <b>4,954,186</b> | <b>5,791,041</b>  | <b>5%</b>                  |

Source: Urban Enterprise, 2018.

## 2.5. ECONOMIC IMPACT OF TOURISM

### 2.5.1. INTRODUCTION

This section details the flow-on economic benefits of tourism for the Greater Geelong and The Bellarine Region. Specifically, this includes the following (direct and indirect<sup>1</sup>) economic benefits generated by visitor expenditure in the Region<sup>2</sup>:

- Economic output; and
- Number of jobs created.

These economic impacts are estimated as annual benefits and are calculated using the input-output multiplier method (developed by REMPLAN and applied by Urban Enterprise). Definitions for key economic terms are provided in Appendix B.

### 2.5.2. CURRENT ECONOMIC IMPACT

The following details the current economic impact from existing visitation to the region (5.8 million) and visitor expenditure (\$1.1 billion) for 2018.

#### ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (CURRENT)

Table 3 shows the estimated economic impact from visitor expenditure in the Region in terms of economic output. This analysis has been disaggregated by sub-region.

Overall, total visitor expenditure of \$1.1 billion<sup>3</sup> – represented by the ‘direct effect’ column – is expected to generate total **economic output of \$2.2 billion**, inclusive of the flow-on indirect effects.

This is driven by the Geelong Urban sub-region, which comprises around 40% of total economic output, generated by higher levels of direct visitor expenditure.

<sup>1</sup> The direct effect is represented by additional visitor expenditure in the region; and the indirect effect reflects the additional, flow-on output generated by other sectors of the economy, particularly the supply-chain.

<sup>2</sup> The analysis assumes visitor expenditure is spent on a combination of: accommodation, retail, food and beverage and transport.

**TABLE 3** ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (CURRENT)

| REGION                                | DIRECT EFFECT          | INDIRECT EFFECT        | TOTAL EFFECT           |
|---------------------------------------|------------------------|------------------------|------------------------|
| Golden Plains South                   | \$14,365,000           | \$13,566,000           | \$27,931,000           |
| Avalon & You Yangs                    | \$17,361,000           | \$17,001,000           | \$34,362,000           |
| Geelong Urban                         | \$461,758,000          | \$446,506,000          | \$908,264,000          |
| Bellarine South                       | \$237,541,000          | \$219,565,000          | \$457,106,000          |
| Bellarine North                       | \$193,279,000          | \$178,276,000          | \$371,555,000          |
| Queenscliff & Point Lonsdale          | \$185,931,000          | \$171,031,000          | \$356,962,000          |
| <b>Geelong &amp; Bellarine region</b> | <b>\$1,110,235,000</b> | <b>\$1,045,945,000</b> | <b>\$2,156,180,000</b> |

Source: Urban Enterprise 2018

#### ONGOING ECONOMIC IMPACT – EMPLOYMENT (CURRENT)

In addition, the total visitor expenditure driven by the tourism industry is expected to create additional jobs in the region (note: this variable represents total numbers of employees without any conversions to full-time equivalence).

As shown in Table 4, total visitor expenditure (of \$1.1 billion) is expected to generate **11,264 jobs** on an ongoing basis, including direct and indirect employment.

Again, over 40% of jobs are created in the Geelong Urban sub-region, which reflects the increased economic output.

<sup>3</sup> Visitor expenditure has been calculated using a 3-year average

**TABLE 5** ONGOING ECONOMIC IMPACT – EMPLOYMENT (CURRENT)

| REGION                                | DIRECT EFFECT | INDIRECT EFFECT | TOTAL EFFECT  |
|---------------------------------------|---------------|-----------------|---------------|
| Golden Plains South                   | 98            | 48              | 146           |
| Avalon & You Yangs                    | 124           | 60              | 184           |
| Geelong Urban                         | 3,245         | 1,584           | 4,829         |
| Bellarine South                       | 1,577         | 780             | 2,357         |
| Bellarine North                       | 1,280         | 633             | 1,913         |
| Queenscliff & Point Lonsdale          | 1,227         | 608             | 1,835         |
| <b>Geelong &amp; Bellarine region</b> | <b>7,551</b>  | <b>3,713</b>    | <b>11,264</b> |

Source: Urban Enterprise 2018

### 2.5.3. PROJECTED ECONOMIC IMPACT

Based on projected growth in visitation to the region – 7.5 million visitors by 2027 – and corresponding growth in visitor expenditure (\$1.7 billion), the economic impact of tourism is also expected to increase.<sup>4</sup>

#### ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (2027)

With total projected expenditure of \$1.7 billion by 2027, the total economic output is expected to increase to **\$3.3 billion**, inclusive of the flow-on indirect effects (see Table 6).

This represents an increase of \$1.1 billion (53%) from current output levels.

<sup>4</sup> Growth in visitor expenditure has been calculated by applying increase in total visitation, as well as increases in visitor expenditure per person, which have been inflated by 2.5% per annum.

**TABLE 6** ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (2027)

| REGION                                | DIRECT EFFECT          | INDIRECT EFFECT        | TOTAL EFFECT           |
|---------------------------------------|------------------------|------------------------|------------------------|
| Golden Plains South                   | \$251,912,000          | \$231,625,000          | \$483,537,000          |
| Avalon & You Yangs                    | \$368,462,000          | \$341,776,000          | \$710,238,000          |
| Geelong Urban                         | \$274,009,000          | \$253,315,000          | \$527,324,000          |
| Bellarine South                       | \$729,669,000          | \$709,720,000          | \$1,439,389,000        |
| Bellarine North                       | \$35,594,000           | \$35,061,000           | \$70,655,000           |
| Queenscliff & Point Lonsdale          | \$31,904,000           | \$29,719,000           | \$61,623,000           |
| <b>Geelong &amp; Bellarine region</b> | <b>\$1,691,550,000</b> | <b>\$1,601,216,000</b> | <b>\$3,292,766,000</b> |

Source: Urban Enterprise 2018

#### ONGOING ECONOMIC IMPACT – EMPLOYMENT (2027)

Table 7 shows that total projected visitor expenditure of \$1.7 billion is expected to generate **17,256 jobs**, which represents an increase of almost 6,000 jobs (53%) by 2027.

**TABLE 7** ONGOING ECONOMIC IMPACT – EMPLOYMENT (2027)

| REGION                                | DIRECT EFFECT | INDIRECT EFFECT | TOTAL EFFECT  |
|---------------------------------------|---------------|-----------------|---------------|
| Golden Plains South                   | 1,661         | 823             | 2,484         |
| Avalon & You Yangs                    | 2,457         | 1,214           | 3,671         |
| Geelong Urban                         | 1,819         | 899             | 2,718         |
| Bellarine South                       | 5,165         | 2,518           | 7,683         |
| Bellarine North                       | 256           | 124             | 380           |
| Queenscliff & Point Lonsdale          | 214           | 106             | 320           |
| <b>Geelong &amp; Bellarine region</b> | <b>11,572</b> | <b>5,684</b>    | <b>17,256</b> |

Source: Urban Enterprise 2018

## 3. GREATER GEELONG AND THE BELLARINE MARKET PROFILE

### 3.1. INTRODUCTION

This section provides a profile of tourism visitation to the Greater Geelong and The Bellarine region, including trend analysis of domestic overnight visitation, domestic daytrip visitation and international overnight visitation.

This section also provides an overview of the key target markets for Greater Geelong and The Bellarine.

### 3.2. KEY FINDINGS

99% of visitors to the Greater Geelong and The Bellarine region are from Victoria, with 71% of these visitors from Melbourne.

Domestic visitation to the Bellarine is much more seasonal than visitation to Geelong and Golden Plains South, likely due to a larger holiday visitor market and lower VFR market.

There is a significantly higher proportion of people staying with friends and relatives in the Greater Geelong and The Bellarine region than other similar coastal locations. Similarly, there is a much higher proportion of people travelling for the purpose of visiting friends and relatives. This is influenced by the large resident population in the region.

A higher proportion of visitors ate out at a restaurant/café than competing coastal destinations and visitors to regional Victoria. Similarly, a higher proportion of visitors took part in paid experiences/activities (e.g. shopping, visiting markets) than similar coastal destinations and Regional Victoria.

75% of visitors to the Bellarine Peninsula went to the beach, which is significantly higher than visitors to similar coastal regions. This also highlights the need for

continued diversification of product in the region including investment in nature based tourism experiences, food, wine and ferments product.

International visitors are a key, growing market for the region, with international students and their visiting family and friends a key market segment. There is significant opportunity to better promote the region to these visitors, as well as opportunity to capture international travellers inbound to Avalon Airport and convert them into daytrip or overnight visitors.

Key target markets for the Greater Geelong and The Bellarine region are the lifestyle leader and MetroTech markets, as well as the traditional family life.

### 3.3. CURRENT MARKETS

#### 3.3.1. DOMESTIC OVERNIGHT TRIP VISITORS

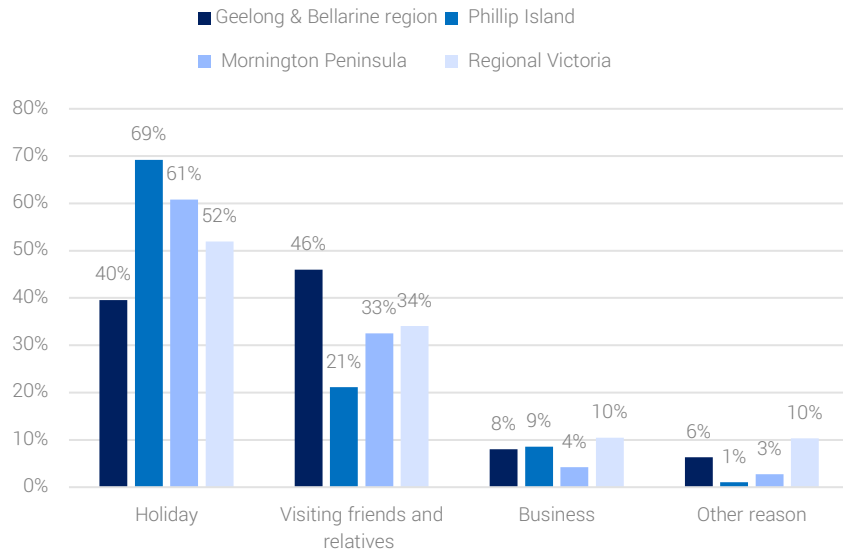
##### TRIP PURPOSE

Figure 5 shows that by purpose of trip, domestic overnight visitation to Greater Geelong and The Bellarine region show a similar proportion of visitation for Holiday purposes (40%) and for Visiting friends and relatives (46%).

By contrast, competing Victorian coastal destinations such as Phillip Island and the Mornington Peninsula have a clear majority of domestic overnight trips for Holiday purposes (61% and 69%, respectively), with less than 35% of trips for VFR. Domestic overnight trips to total regional Victoria are predominantly for Holiday purposes (56%), with only 29% of trips for VFR.



**FIGURE 5** OVERNIGHT TRIPS, PURPOSE OF TRIP

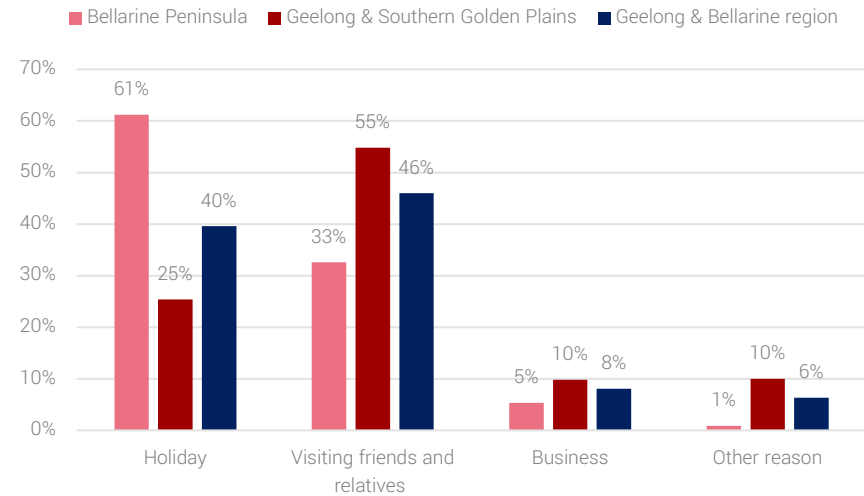


Source: Tourism Research Australia, NVS Overnight, Stopover Reason, Financial Year 2017/18.

Figure 6 shows that within the region however, visitation for Holiday and VFR purposes is largely destination specific for domestic overnight trips. 54% of overnight trips to Geelong & Golden Plains South are for VFR and only 25% for Holiday purposes, due to the large resident population within the sub-region.

By contrast, the purpose for domestic overnight visitation to the Bellarine Peninsula is largely similar to other coastal destinations in Victoria, with 66% of overnight trips for Holiday purposes and only 29% for VFR.

**FIGURE 6** OVERNIGHT – PURPOSE OF TRIP



Source: Tourism Research Australia, NVS Overnight, Stopover Reason, Financial Year 2017/18.

**The main purpose of trip for overnight visitors to the Greater Geelong and The Bellarine region reflects the large population and business base of Geelong Urban, with lower levels of holiday leisure visitation than similar regions around Melbourne, and a corresponding higher level of visiting friends and relatives. Data for the Bellarine Peninsula shows that it attracts much higher levels of holiday leisure visitation than Urban Geelong.**

## VISITOR ORIGIN

The majority of domestic overnight visitors to the Greater Geelong and The Bellarine region are from Victoria (86%), with 60% of visitors from Melbourne and 27% from Regional Victoria. The Greater Geelong and The Bellarine region receives a lower proportion of visitors from Melbourne than competing Mornington Peninsula (73%) or Phillip Island (79%) destinations, however a greater proportion of visitors to the Greater Geelong and The Bellarine region are from Regional Victoria (27%).

**TABLE 8** OVERNIGHT TRIPS, STATE OF VISITOR ORIGIN

| Origin                       | Geelong & Bellarine Region | Phillip Island | Mornington Peninsula | Regional Victoria |
|------------------------------|----------------------------|----------------|----------------------|-------------------|
| Victoria                     | 86%                        | 91%            | 86%                  | 85%               |
| Melbourne                    | 60%                        | 79%            | 73%                  | 61%               |
| Other VIC                    | 27%                        | 11%            | 13%                  | 24%               |
| New South Wales              | 5%                         | 5%             | 5%                   | 7%                |
| Queensland                   | 4%                         | 1%             | 4%                   | 2%                |
| South Australia              | 1%                         | 1%             | 2%                   | 3%                |
| Western Australia            | 1%                         | 1%             | 0%                   | 1%                |
| Tasmania                     | 1%                         | 1%             | 1%                   | 1%                |
| Northern Territory           | 0%                         | 0%             | 0%                   | 0%                |
| Australian Capital Territory | 1%                         | 0%             | 1%                   | 1%                |
| Total                        | 100%                       | 100%           | 100%                 | 100%              |

Source: Tourism Research Australia, NVS Overnight, Origin, Financial Year 2017/18.

**Origin data highlights the importance of promotion of Greater Geelong and The Bellarine region to regional Victorian destinations as well as directly into Melbourne. Large inland regional centres such as Ballarat and Bendigo provide a strong market for Greater Geelong and The Bellarine.**

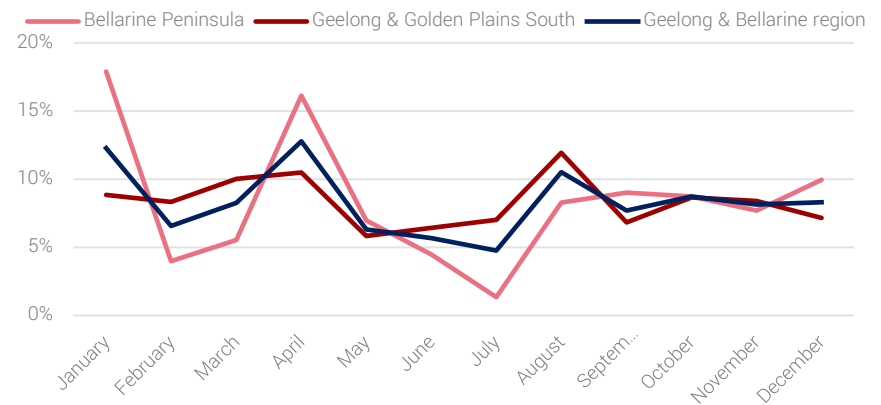
## SEASONALITY

Visitation for the Greater Geelong and The Bellarine region peaks in April at 13%, however is generally consistent with many coastal destinations, in that visitation is higher during summer and lower during winter. Visitation peaks in the month of January (12%) of trips and the least number of trips are in the month of July, during the middle of winter.

Visitation to the Geelong and Golden Plains South region is steady and doesn't show much seasonality, due to the large population base, and associated VFR and business market. The Bellarine Peninsula shows significant fluctuation, as most coastal destinations like Mornington Peninsula and Phillip Island do. However, the Surf Coast experiences much less fluctuation, potentially due to the Great Ocean Road which attracts high visitor numbers throughout the year and large numbers of international visitors.

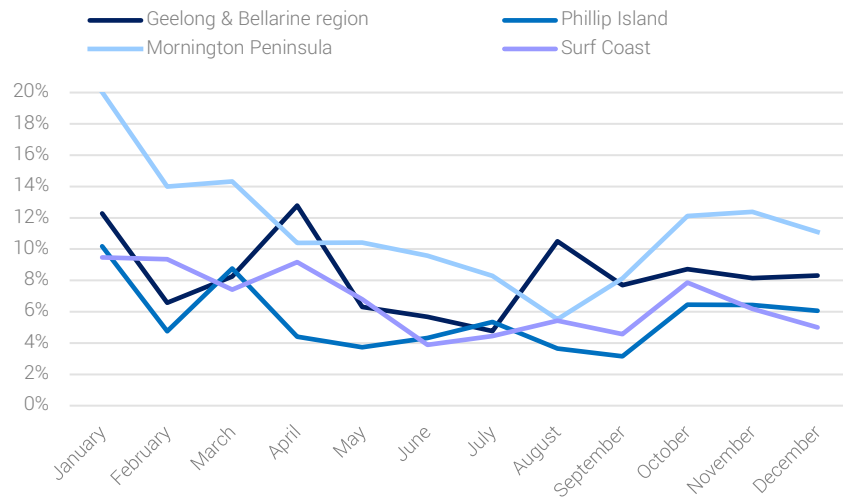
Visitation to the Bellarine Peninsula drops to 1% in July, whereas visitation to Geelong and Golden Plains South remains relatively consistent at 7% of trips. The Bellarine Peninsula has high visitation during the month of April, coinciding with the Easter holiday break.

**FIGURE 7** OVERNIGHT TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Overnight, Month returned from trip, Financial Year 2017/18.

**FIGURE 8** OVERNIGHT TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Overnight, Month returned from trip, Financial Year 2017/18.

### VISITOR ACTIVITIES

Analysis of domestic overnight visitor activities undertaken in the Greater Geelong and The Bellarine region highlights the popular urban tourism product offerings of Geelong, and the nature-based tourism strengths of the Bellarine Peninsula. Visitors

to the Greater Geelong and The Bellarine region are more likely than visitors to Regional Victoria to both Eat out/dine at a restaurant/café (65%) and visit friends and relatives (59%).

Visitors to the Bellarine Peninsula (75%) are more likely to visit the beach than similar coastal locations, such as Mornington Peninsula (54%) and Phillip Island (62%). 11% of trips to the Bellarine Peninsula included visiting markets, higher than the 8% of visitors across regional Victoria that visited local markets.

65% of trips to the Geelong and Golden Plains South area included visiting Friends & relatives, significantly higher than the 45% of total Regional Victoria. Therefore, engagement of local residents in the tourism product offering and destination marketing in Geelong is critical, due to the large VFR market.

Visitors to the Greater Geelong and The Bellarine region are more than twice as likely to attend an organised sporting event than visitors to Regional Victoria, which highlights the opportunity to keep growing the region as a sporting destination.

**It is important to note that 20% of visitors to the Geelong and Golden Plains South region did not participate in any activities, which is more than double the regional Victoria average. This may highlight a lack of attractive activities for visitors to undertake in this region.**

**TABLE 9** OVERNIGHT TRIPS, ACTIVITIES

| Activities Undertaken                                  | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & Bellarine Region | Phillip Island | Mornington Peninsula | Regional Victoria |
|--|---------------------|-------------------------------|----------------------------|----------------|----------------------|-------------------|
| Eat out / dine at a restaurant and/or cafe             | 66%                 | 65%                           | <b>65%</b>                 | 59%            | 56%                  | 58%               |
| Visit friends & relatives                              | 49%                 | 65%                           | <b>59%</b>                 | 37%            | 45%                  | 45%               |
| Go to the beach  | 75%                 | 25%                           | <b>45%</b>                 | 62%            | 54%                  | 25%               |
| Sightseeing/looking around                             | 42%                 | 23%                           | <b>31%</b>                 | 30%            | 23%                  | 28%               |
| Go shopping for pleasure                               | 20%                 | 26%                           | <b>23%</b>                 | 17%            | 20%                  | 17%               |
| Pubs, clubs, discos etc                                | 16%                 | 19%                           | <b>18%</b>                 | 16%            | 15%                  | 22%               |
| None of these  | 9%                  | 20%                           | <b>15%</b>                 | 4%             | 7%                   | 7%                |
| Go to markets  | 11%                 | 9%                            | <b>10%</b>                 | 10%            | 7%                   | 8%                |
| Go on a daytrip to another place                       | 11%                 | 5%                            | <b>7%</b>                  | 3%             | 4%                   | 6%                |
| Visit national parks / state parks                     | 8%                  | 7%                            | <b>7%</b>                  | 12%            | 11%                  | 14%               |
| Exercise, gym or swimming                              | 7%                  | 6%                            | <b>7%</b>                  | 9%             | 8%                   | 6%                |
| Attend an organised sporting event                     | 3%                  | 9%                            | <b>7%</b>                  | 4%             | 2%                   | 3%                |
| Visit wineries   | 11%                 | 4%                            | <b>6%</b>                  | 3%             | 11%                  | 5%                |
| Visit museums or art galleries                         | 6%                  | 5%                            | <b>5%</b>                  | 4%             | 4%                   | 5%                |
| Bushwalking / rainforest walks                         | 5%                  | 5%                            | <b>5%</b>                  | 20%            | 11%                  | 15%               |
| Visit botanical or other public gardens                | 4%                  | 5%                            | <b>5%</b>                  | 4%             | 3%                   | 4%                |
| Fishing  | 10%                 | 1%                            | <b>4%</b>                  | 4%             | 3%                   | 6%                |
| Attend festivals / fairs or cultural events            | 3%                  | 5%                            | <b>4%</b>                  | 3%             | 2%                   | 4%                |
| Visit history / heritage buildings, sites or monuments | 5%                  | 3%                            | <b>4%</b>                  | 3%             | 4%                   | 5%                |
| Picnics or BBQs  | 6%                  | 2%                            | <b>4%</b>                  | 6%             | 3%                   | 6%                |
| Golf   | 5%                  | 3%                            | <b>3%</b>                  | 2%             | 3%                   | 3%                |
| Play other sports                                      | 4%                  | 2%                            | <b>3%</b>                  | 4%             | 3%                   | 4%                |
| Surfing  | 6%                  | 1%                            | <b>3%</b>                  | 6%             | 3%                   | 2%                |
| Attend theatre, concerts or other performing arts      | 2%                  | 3%                            | <b>3%</b>                  | 1%             | 2%                   | 2%                |

Source: Tourism Research Australia, Individual Activity on Stopover, NVS Overnight, Financial Year 2017/18

## ACCOMMODATION

Visitors on domestic overnight trips to the Greater Geelong and The Bellarine region are most likely to stay at a Friends or Relatives Property (56%), particularly visitors to Geelong & Golden Plains South (63%), although this is still the leading type of accommodation for the Bellarine Peninsula (47%).

The majority of visitors staying in Standard Hotel/Motor inn style accommodation are in Geelong & Golden Plains South (16%), compared with only 2% in the Bellarine Peninsula. This may highlight a lack of standard hotel/motor inn style accommodation on the Bellarine Peninsula.

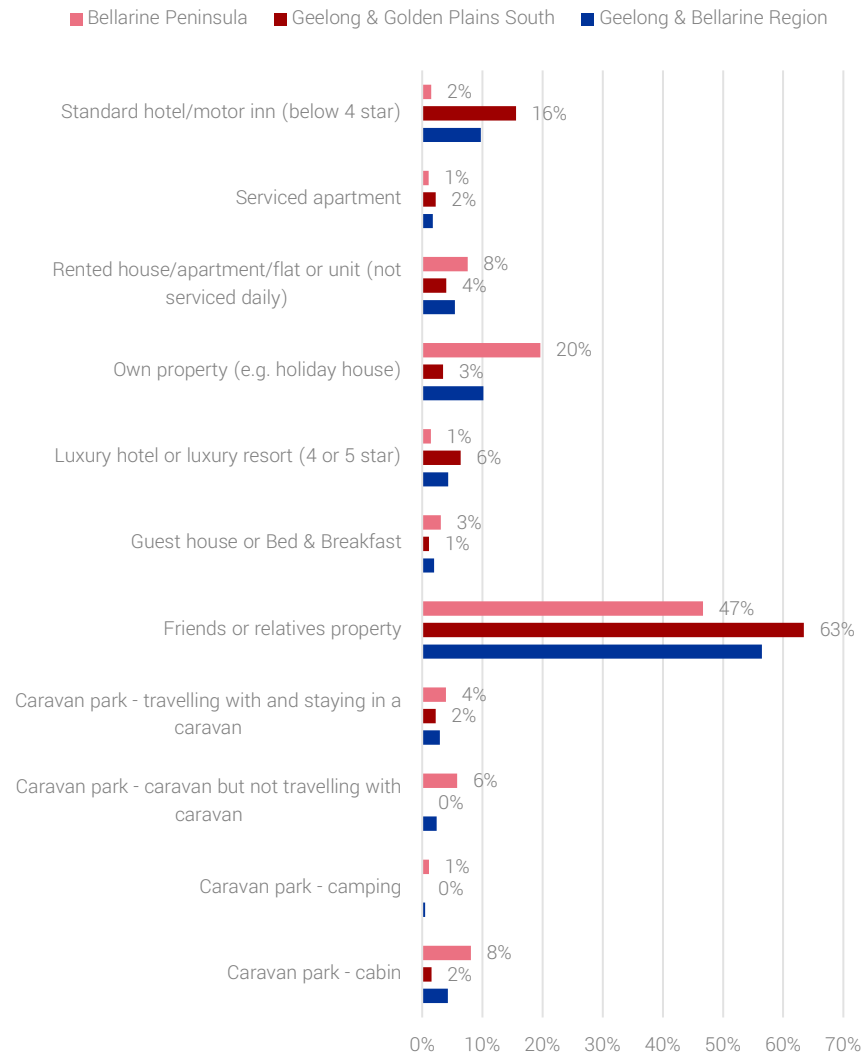
The holiday home market is prominent in the Bellarine Peninsula; however, it has experienced a significant shift in accommodation types. Since 2015, there has been a significant decline of 7% in overnight visitors staying in a Rented House/Apartment/Flat or unit that is not serviced daily (total 8%), and an increase in 6% of people staying in their own property (total 20%).

The Bellarine Peninsula also has a strong caravan, cabin and camping market; with 19% of visitors staying in a caravan park (either staying in a caravan, cabin or camping). The data highlights significant supply of caravan parks across the Bellarine Peninsula servicing this market.

Only 4% of overnight visitors to the Greater Geelong and The Bellarine stayed in a luxury hotel or luxury resort (4 or 5 star) in the 2017/18 financial year, driven mainly by visitors to Geelong and Southern Golden Plains (6%).

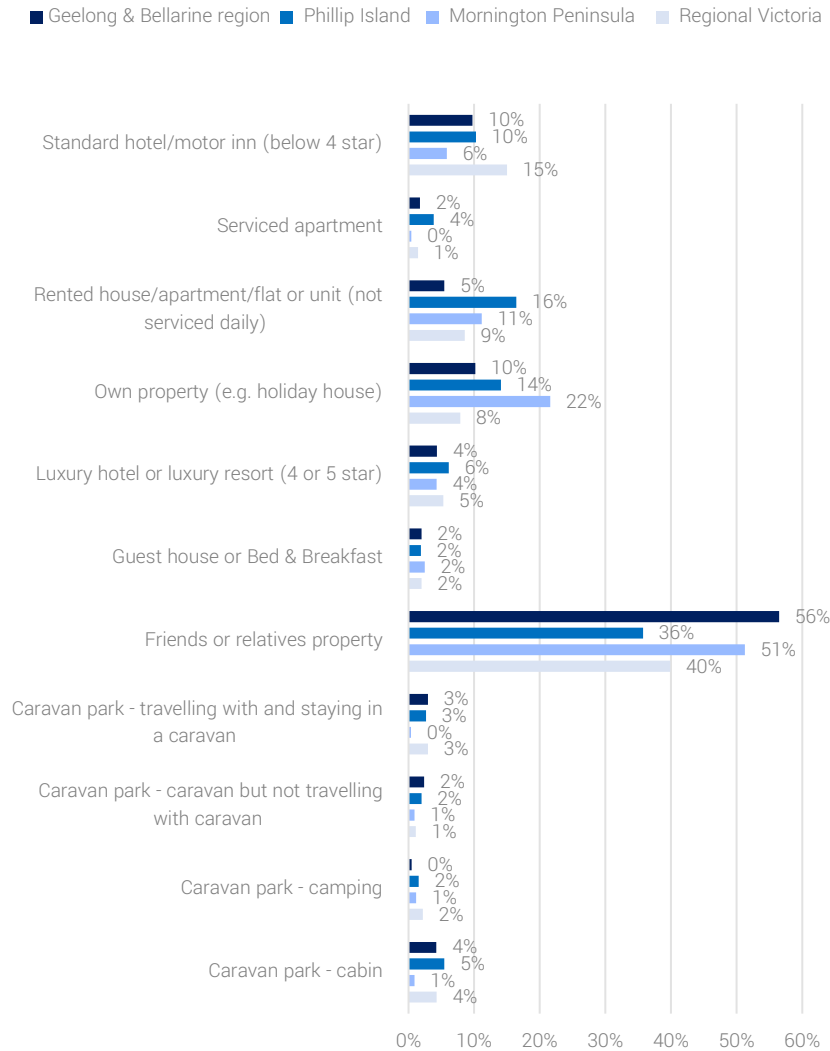
The Greater Geelong and The Bellarine region has a greater proportion of domestic overnight visitors staying with their friends or relatives (56%) compared to Regional Victoria (40%), although a similar proportion to Mornington Peninsula (51%). However, the Mornington Peninsula has a much greater proportion of visitors staying in their own property (22%), than the Greater Geelong and The Bellarine region (10%); this is similar to Regional Victoria, (8%).

FIGURE 9 OVERNIGHT TRIPS, ACCOMMODATION



Source: Tourism Research Australia, Stopover Accommodation, NVS Overnight, Financial Year 2017/18.

**FIGURE 10** OVERNIGHT TRIPS, ACCOMMODATION, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Overnight, Stopover Accommodation, Financial Year 2017/18.

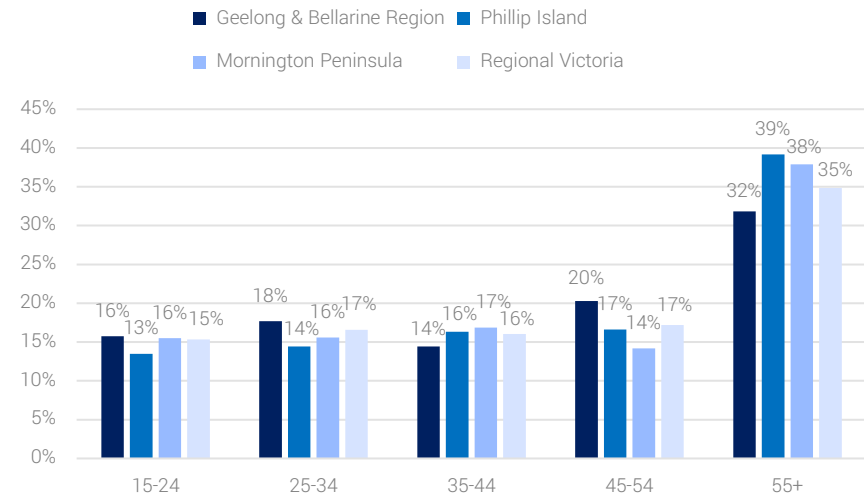
**VISITOR AGE**

The overall age profile of overnight visitors to the Greater Geelong and Bellarine region is similar to that of Regional Victoria.

Geelong and the Bellarine region has a slightly lower number of visitors in the 55+ age group compared to similar coastal locations. This may indicate a number of previous visitors staying in their holiday homes now having moved permanently to their holiday homes.

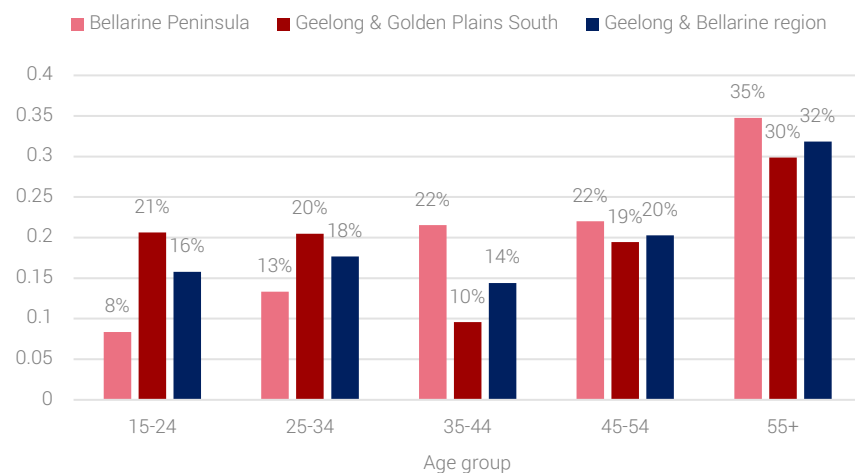
Within the Greater Geelong and the Bellarine region, the age profile of visitors to the Bellarine Peninsula has a strong skew towards the older age groups, with 55% of visitors aged 45 and over. Conversely, Geelong & Golden Plains South has a greater proportion of younger visitors, with 41% of overnight visitors aged between 15-34.

**FIGURE 11** OVERNIGHT TRIPS, VISITOR AGE, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Overnight, Age group, Financial Year 2017/18.

**FIGURE 12** OVERNIGHT TRIPS, VISITOR AGE



Source: Tourism Research Australia, NVS Overnight Age group, Financial Year 2017/18.

### 3.3.2. DOMESTIC DAYTRIP VISITORS

#### VISITOR ORIGIN

99% of day trip visitors to Greater Geelong and the Bellarine region are from Victoria, with 71% of visitors originating from Melbourne.

The top 5 LGA's where daytrip visitors originate from is shown in Table 11. This highlights that a significant proportion of visitors to the Greater Geelong and The Bellarine region are from Western Regional Victoria (Ballarat, Colac-Otway) and from Western Melbourne (Wyndham, Hobsons Bay).

**TABLE 10** DAY TRIPS, VISITOR ORIGIN

| Visitor Origin         | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & the Bellarine Peninsula |
|------------------------|---------------------|-------------------------------|-----------------------------------|
| <b>Victoria</b>        | 100%                | 99%                           | 99%                               |
| <i>Melbourne</i>       | 74%                 | 70%                           | 71%                               |
| <i>Other VIC</i>       | 26%                 | 30%                           | 29%                               |
| <b>Other Australia</b> | 0%                  | 1%                            | 1%                                |

Source: Tourism Research Australia, Visitor Origin, NVS Daytrip, Financial Year 2017/18.

**TABLE 11** DAY TRIPS, HOME LGA WITHIN VICTORIA

| Home LGA        | % of Victorian daytrip visitors |
|-----------------|---------------------------------|
| Wyndham (C)     | 6%                              |
| Ballarat (C)    | 5%                              |
| Hobsons Bay (C) | 4%                              |
| Colac-Otway (S) | 4%                              |
| Hume (C)        | 4%                              |

Source: Tourism Research Australia, Visitor Origin, NVS Daytrip, Financial Year 2017/18.

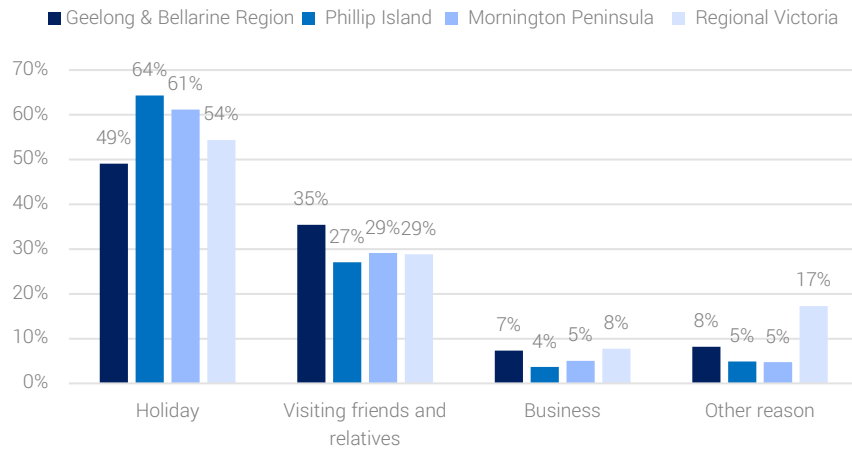
## TRIP PURPOSE

The majority of daytrip visitors to the Greater Geelong and The Bellarine region are visiting for holiday and leisure purposes (49%) followed by VFR (35%).

Visitation follows a similar pattern within the region, although the Bellarine Peninsula has a slightly higher percentage of Holiday visitation.

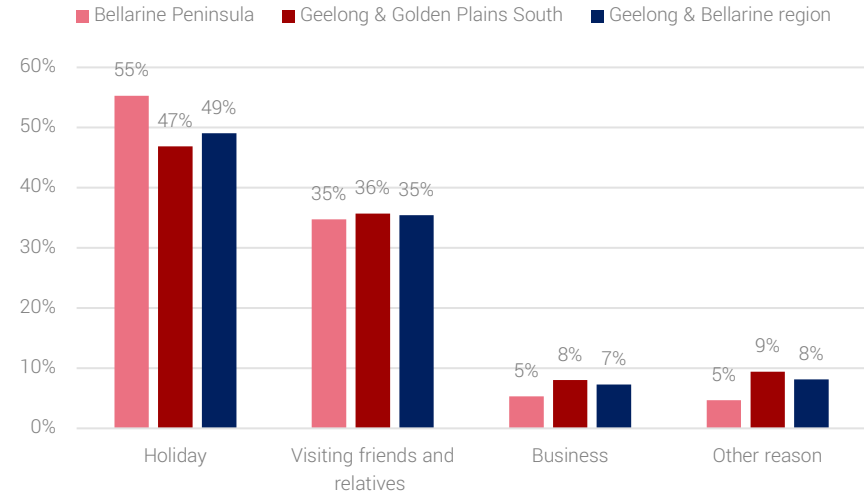
Greater Geelong and The Bellarine region has a stronger VFR market than other similar coastal locations, and a similarly higher percentage of visitation for Business purposes.

**FIGURE 13** DAYTRIP, PURPOSE OF TRIP, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Daytrip, Main Reason for Trip, Financial Year 2017/18.

**FIGURE 14** DAYTRIP, PURPOSE OF TRIP



Source: Tourism Research Australia, NVS Daytrip, Main Reason for Trip, Financial Year 2017/18.

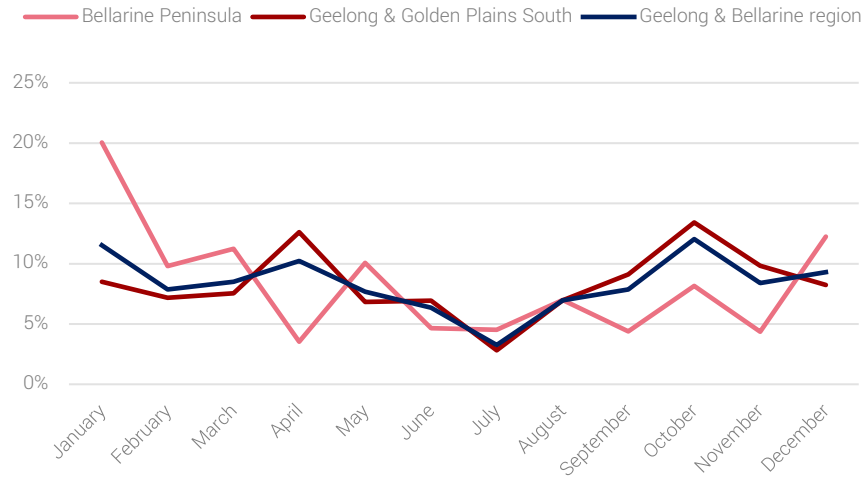
## SEASONALITY

Figure 15 shows that day trips to the Bellarine Peninsula peak at 20% in the month of January and fall to a low of 4% in April. Visitation to both sub-regions falls significantly in July.

Figure 16 shows that visitation is quite seasonal to Greater Geelong and the Bellarine region when compared to similar coastal locations like the Mornington Peninsula.

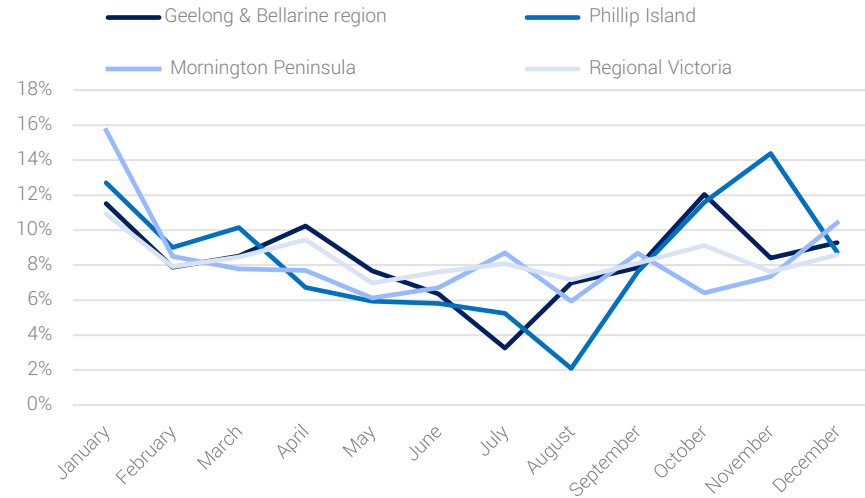


**FIGURE 15** DAY TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Daytrip, Month returned from trip, Financial Year 2017/18.

**FIGURE 16** DAY TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Daytrip, Month returned from trip, Financial Year 2017/18.

### 3.3.3. INTERNATIONAL VISITORS

International visitors are an important, growing market for Greater Geelong and The Bellarine with 53,000 international overnight visitors visiting the region in 2018 (Business Victoria, 2018). International students are a key segment of this market, and in particular their visiting friends and relatives.

#### TRIP PURPOSE

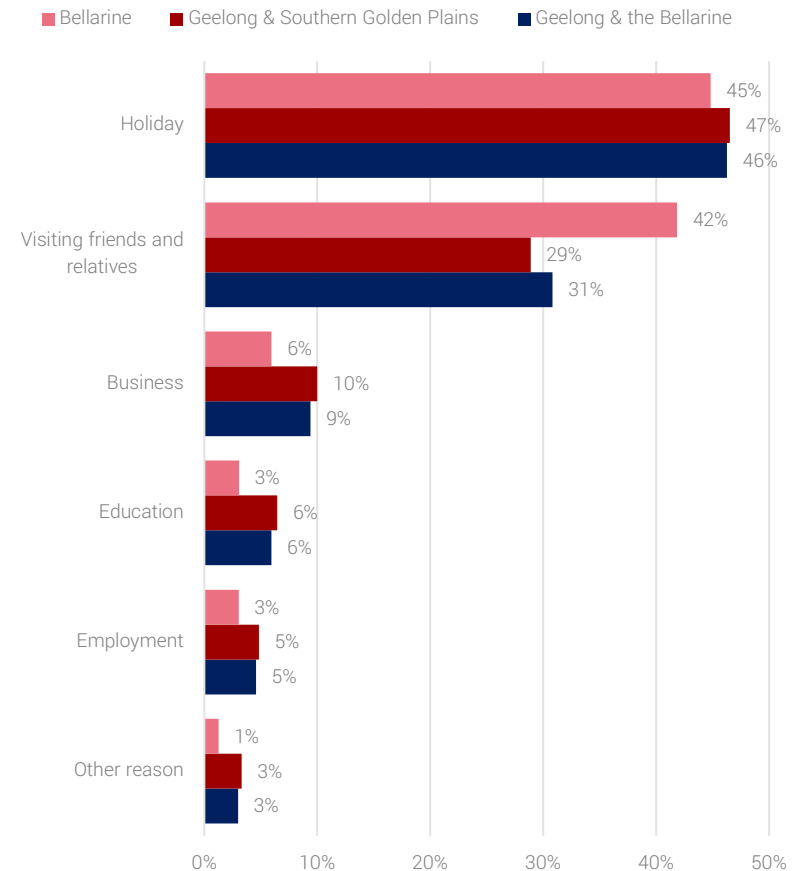
The majority of international visitors to the Greater Geelong and The Bellarine region are visiting for Holiday purposes (45%), however a large proportion are also Visiting Friends and Relatives (31%). 9% of international visitors were visiting for Business and 6% for Education.

The main purpose of travel for international visitors to the Bellarine Peninsula was Visiting Friends and Relatives (42%), which is significantly higher than Geelong & Southern Golden Plains (29%).

**International students are an important source of visitation for the region, particularly to Geelong Urban with Deakin University waterfront campus and Waurn Ponds campus. Geelong receives around 3,800 international students annually, predominately tertiary students (2,949). The economic activity generated per annum by a single secondary student is \$32,155, and by a tertiary student is \$41,675<sup>5</sup>.**

**Further promotion of the Greater Geelong and the Bellarine to international markets is necessary, as there is an increasing number of international students and their visiting family and friends.**

FIGURE 17 INTERNATIONAL TRIPS, PURPOSE OF VISIT



Source: Tourism Research Australia, IVS, Main Reason for Trip, Calendar Year 2013-17<sup>6</sup>.

<sup>5</sup> Study Geelong. REMPLAN economic modelling based on data sourced from ABS 2016 Census Place of Work Employmentm ABS 2014/15 National Input Output Tables, ABS June 2017 Gross State Product, TRA Tourism in Local Government Areas 2016 Greater Geelong.

<sup>6</sup> Due to the sample size limitations of the International Visitors Survey, analysis of international visitors in this section uses a data average taken over a period of 5 calendar years between 2013-17, in order to increase the reliability of the data.

## VISITOR ORIGIN

The United Kingdom is the largest international visitor market to the Greater Geelong and The Bellarine region, representing 16% of visitors, closely followed by New Zealand at 14% and China at 13%.

The Bellarine Peninsula has a significantly lower Chinese market compared to the Geelong and Golden Plains South area (2% compared to 15%), however has a higher proportion of visitors from the United Kingdom (23% compared to 15%).

**TABLE 12** INTERNATIONAL VISITORS, COUNTRY OF RESIDENCE

| Country of Residence     | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & Bellarine region | Regional Victoria |
|--------------------------|---------------------|-------------------------------|----------------------------|-------------------|
| United Kingdom           | 23%                 | 15%                           | 16%                        | 16%               |
| New Zealand              | 18%                 | 13%                           | 14%                        | 13%               |
| China                    | 2%                  | 15%                           | 13%                        | 10%               |
| United States of America | 9%                  | 8%                            | 8%                         | 9%                |
| Germany                  | 9%                  | 5%                            | 6%                         | 8%                |
| Other Countries          | 4%                  | 5%                            | 5%                         | 4%                |
| Malaysia                 | 5%                  | 5%                            | 5%                         | 4%                |
| Other Asia               | 5%                  | 4%                            | 4%                         | 2%                |
| Other Europe             | 5%                  | 3%                            | 4%                         | 5%                |
| Singapore                | 1%                  | 3%                            | 3%                         | 4%                |
| Netherlands              | 2%                  | 3%                            | 3%                         | 2%                |

Source: Tourism Research Australia, IVS, Country of Residence, Calendar Year 2013-17.

## VISITOR EXPENDITURE AND LENGTH OF STAY

International overnight visitors spent a total of \$98 million in the region in 2018 (YE September). On average, this equated to a spend of \$115 per night and \$1,854 per trip in the region. Alongside Great Ocean Road, Geelong has the highest international visitor spend per night of Victoria's regions.

The 53,000 international overnight visitors to Greater Geelong and the Bellarine region spent an average of 16.1 nights in the region, which is higher than many other regions, notably competing coastal regions Great Ocean Road (4.3 nights) and Mornington Peninsula (16 nights).

**TABLE 13** VISITATION, EXPENDITURE AND TRIP LENGTH – REGIONAL COMPARISON

| Tourism Region                | Visitor Number | Spend Per Person | Spend per Night | Length of stay (nights) |
|-------------------------------|----------------|------------------|-----------------|-------------------------|
| Daylesford and Macedon Ranges | 18,000         | \$542            | \$19            | 29                      |
| Geelong and the Bellarine     | 53,000         | \$1,854          | \$115           | 16.1                    |
| Gippsland                     | 75,000         | \$622            | \$61            | 10.2                    |
| Goldfields                    | 44,000         | \$905            | \$76            | 11.9                    |
| Grampians                     | 51,000         | \$252            | \$48            | 5.2                     |
| Great Ocean Road              | 219,000        | \$505            | \$116           | 4.3                     |
| Mornington Peninsula          | 61,000         | \$951            | \$68            | 14                      |
| Murray Region                 | 63,000         | \$1,106          | \$40            | 27.5                    |
| North East Region             | 31,000         | \$624            | \$63            | 10                      |
| Phillip Island                | 50,000         | \$357            | -               | -                       |
| Yarra Valley                  | 48,000         | -                | -               | 20.4                    |

Source: Business Victoria, Regional Tourism Summaries, Year Ending September 2018.

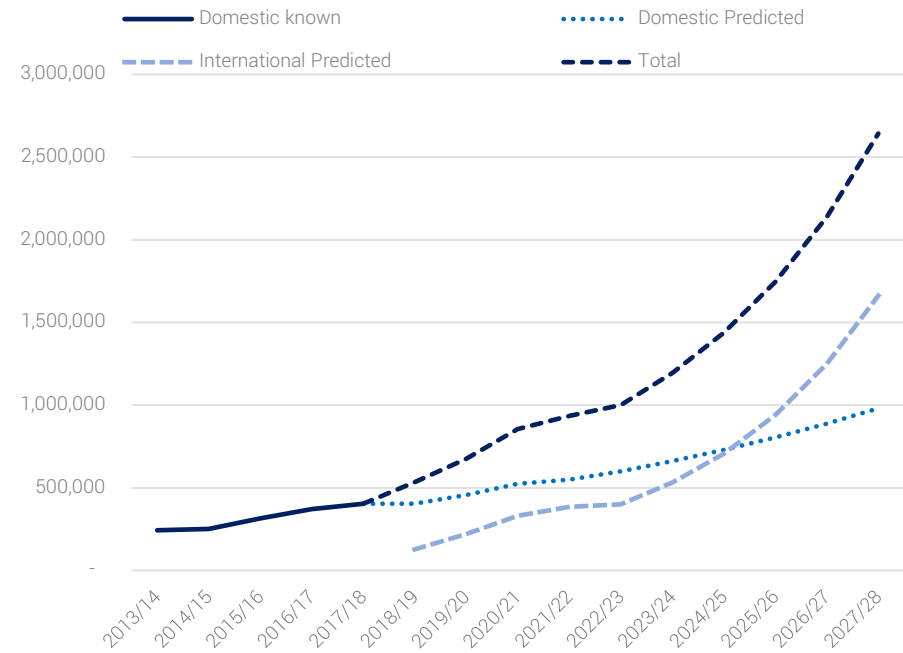
## PREDICTED INTERNATIONAL VISITATION

Figure 18 shows the current inbound passenger numbers for Avalon Airport, and the predicted passenger numbers to 2027/28. Domestic passenger numbers have been modelled using Jetstar as the only domestic airline, and international passengers have been modelled using AirAsia as the only international airline operating till 2027/28.

Total inbound passengers are predicted to reach approximately 2.6 million, with approximately 1.6 million of these international passengers.

**Although it is likely that a proportion of these passengers will be in transit and not staying in the Greater Geelong and the Bellarine region, the introduction of international flights to the region provides a significant opportunity to capture increased international travellers and convert them into daytrip or overnight visitors.**

**FIGURE 18** PROJECTED PASSENGERS. INBOUND TO AVALON AIRPORT



Source: Avalon Airport.

### 3.4. TARGET MARKETS

This section provides a brief discussion on the Brand Geelong, informed by a 2014 perceptions study undertaken by Tourism Greater Geelong and The Bellarine and Galeforce Strategic Marketing. This following information was developed from this study, which identified target markets for Greater Geelong.

These target markets are still the most relevant target markets for Geelong and the Bellarine region.

#### 3.4.1. BRAND GEELONG

In 2014, Tourism Greater Geelong and The Bellarine, in collaboration with Galeforce Strategic Marketing, conducted a brand perception survey to evaluate the current state of Brand Geelong in the eyes of the consumer and local industry.

The findings were that there was no single Brand Geelong in the eyes of both consumer and industry, and if there was it was a very weak image. There was a perception that the city's offerings were too diverse for one singular image, and that Geelong was identified as going through a transitioning economy. The waterfront was identified by the vast majority of respondents as the key feature of Geelong, and overall sentiment was positive, describing the region as relaxed, interesting and friendly.

Conclusions were that Geelong is positioned well for change, and that the Brand Geelong is not broken but rather unknown and unclear. Recommendations included to develop, manage and protect Geelong as a master brand as a marketing priority, to increase awareness for the city and its attributes through more intensive marketing efforts, and build on the appreciation of Geelong as a place of connection, reinvention and discovery.

#### 3.4.2. TARGET MARKETS

The key target markets identified in the Brand Geelong study by Galeforce Strategic Marketing were Roy Morgan's Helix Persona's Leading Lifestyles and Metrotechs markets, residing in Geelong and Melbourne. Profiles of these markets are described below.

##### LEADING LIFESTYLES



Leading lifestyles are high income families, typically owning their own home in the inner suburbs. This market accounts for 24% of the population with an average household income of \$120,000 p.a.

Leading Lifestyles are highly educated and highly paid professionals, managers and white-collar workers in finance and business, law, media and the arts. Money is earned, invested and distributed—to younger family members, local schools and art groups, worthy charities—without question that the cycle will continue indefinitely.

They believe in their own genuine stake in society, not only as participants but as authors: their opinions matter, and they take seriously the mantle of influence.

Amongst the other Roy Morgan Helix Persona communities, the Leading Lifestyles community accounts for 24% of the Australian population aged 14 and above. Within this community, the 'Successful Bureaucrats' and 'Financial Freedom' Persona types were recommended by Galeforce Strategic Marketing as key target markets from the Roy Morgan Helix Persona's Leading Lifestyles community.

'Successful Bureaucrats' persona types (2.2%) are well-educated young families/couples, who are fond of destinations offering both cultural and seaside experiences. They enjoy art galleries/museums, coffee, wine, and restaurants, and buying technological products.

'Financial Freedom' persona types (1.8%) are predominantly wealthy mid-life couples (typically with teenage children), and are high domestic travellers. They are tech-savvy, enjoy the cinema, shopping for homewares, and also watching reality television programs.

### **IMPLICATIONS**

The Leading lifestyles segment has interest in a broad range of products and experiences matched to the Greater Geelong and The Bellarine region. This segment would be interested in the growing arts and cultural scene in Geelong and the food and lifestyle experiences on The Bellarine Peninsula.

This market has a strong preference for seaside destinations. Competitor destinations in Victoria also targeting this market include Surf Coast (e.g. Lorne, Anglesea) and the Mornington Peninsula (e.g. Sorrento, Rye).

In order to grow this market further, focus needs to be made on providing contemporary experiences including quality dining, farm gate and food attractions on The Bellarine and further develop interesting niche arts and cultural experiences in Geelong.

A combination of coastal, nature-based settings and experiences with other quality lifestyle and indulgence activities provides a strong setting for capturing this market.

### **METROTECHS**



Metrotechs are young, single, well educated, inner city professionals with high incomes, typically renting apartments. They are cultured, connected, clued-in & cashed up. This market accounts for 13% of the population with an average household income of \$109,000 p.a. You'll find Metrotechs in capital cities, working hard to get ahead in the finance, property, business and IT industries.

They're an ambitious bunch: young, educated and willing to put in the hard yards to fulfil their professional dreams. But this doesn't stop them enjoying life: they play almost as hard as they work.

Usually single or de facto, often from Asian or European backgrounds, their high salaries afford an upwardly mobile lifestyle – tempered with a strong social conscience.

Amongst the other Roy Morgan Helix Persona communities, the Metrotechs community accounts for 13.2% of the Australian population aged 14 and above. The 'Social Flyers' Persona type (0.7%) was recommended by Galeforce Strategic Marketing as a key target market from the Roy Morgan Helix Persona's Metrotech community.

'Social Flyers' are the most likely type within the Metrotech community to spend their leisure time visiting and exploring other areas in Australia and have a distinct preference for urban destinations which offer cultural and entertainment experiences.

They are often from non-Australian backgrounds, are young, educated, are living in inner-city areas, and are highly engaged in social media. They enjoy art galleries/museums, fashion, bars and nightclubs, travel, restaurants and wine

### **IMPLICATIONS**

This market segment has strong alignment with the emerging product and experiences in Urban Geelong including Boom Gallery, Pakington St and Little Creatures brewery. The development of new and interesting experiences is required to grow this market. Product that is new and innovative will be attractive to this market.

There are few Victorian destinations that target this market effectively. Ballarat and Bendigo are locations where the product mix is being developed to meet the needs of this market, however in both instances this is still only emerging.

Geelong has potential to be a key destination for this market, however further development of arts and cultural attractions which offer a point of difference is needed. In addition, the retail focus of Geelong CBD would need to transition significantly to meet this market. Smaller destinations such as Pakington Street provide a retail setting better suited to this market.

### **TRADITIONAL FAMILY LIFE**

Traditional Family Life, along with its younger counterpart, Conventional Family Life, represents the core of 'middle Australia', with values centred around the significant

events in their personal and family lives. The traditional Family Life and Conventional Family Life Segments are motivated by similar values in terms of security, reliability and providing better opportunities for their family. The Traditional Family Life segment accounts for 20% of the population<sup>7</sup>.

Within Australia, the Traditional Family Life are now generally empty-nesters or extended families. With their children grown their focus is on re-building their relationship with one another and finding time to do things they never could while their children were growing up. But with such a strong focus on the family, they spend a great deal of time and energy getting the family to visit them, babysitting, weekend BBQs and buying lollies for the grandkids, which their parents won't let them have.

Not liking change, old and familiar environments are important in the Traditional Family Life Segment.

### **IMPLICATIONS**

Whilst Lifestyle Leaders and Metrotechs are markets which are drawn to contemporary new experiences, the region is still well matched to the experience and product profile of Traditional Family Life Segments (particularly the Bellarine Peninsula). Family holidays, going to the beach and camping are common activities in the region which continue to attract the Traditional Family Life market.

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<sup>7</sup> Holiday Tracking Study, Roy Morgan Research via Great Ocean Road Destination Management Plan, 2011

## 4. PRODUCT AND TOURISM DEVELOPMENT IN GREATER GEELONG AND THE BELLARINE

### 4.1. INTRODUCTION

Urban Enterprise undertook a comprehensive tourism product audit to inform this Tourism Development Strategy Update. Information was sourced from a database of tourism businesses from Tourism Greater Geelong and The Bellarine, through online research of accommodation listings and attractions, and enhanced through consultation with Local Government Authorities and additional stakeholders.

Information on tourism establishments and the region's attractions were categorised by the following product types:

- Accommodation;
- Business and Conference market;
- Food and beverage;
- Nature-based tourism;
- Events and festivals;
- History and heritage,
- Arts and culture; and
- Retail.

It is important to note that Geelong has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN). This recognition of Geelong as a creative city, one of only 31 in the world, means Greater Geelong has an ongoing responsibility to uphold a high standard of design and quality for all future developments, projects and infrastructure.

### 4.2. KEY FINDINGS

**Greater Geelong and The Bellarine has primary strengths in nature-based attractions. These attractions are predominantly centred on Port Phillip Bay and the ocean beaches to the south. The water-based assets of the region act as a key motivator for visitation, particularly in the peak summer season.**

**The other area of primary strength is in events and festivals with Geelong hosting numerous sporting and recreation events, some of global significance. The Australian International Air show, Cadel Evans Great Ocean Road Race and Meredith Music Festival are examples of high-profile events held in the region.**

**The region also has primary strengths in food and beverage as well as arts and culture. Geelong is the only city in Australia that has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN).**

**There is limited hotel/motel style accommodation in Geelong Urban for the events market (business, sporting and food). Development of 4-5-star quality accommodation is a key opportunity for Geelong Urban and will support the proposed investment in the Geelong Convention and Exhibition Centre.**

**There is very limited commercial guestroom accommodation in Bellarine North and Bellarine South (20% and 34% respectively). This presents a strong opportunity to grow overnight visitation in the region.**

**Key new investments since 2015 include development of Avalon international air terminal, Flying Brick Cider Co, Curlewis Golf Club redevelopment including the Range, 360Q restaurant and several small high-end boutique accommodation offers. Further to this, the QTrain and several high-end profile restaurants have strengthened the regions food and beverage offering.**



#### 4.2.1. PRODUCT STRENGTHS

Primary product strengths in the Greater Geelong and The Bellarine region are nature-based tourism and festivals and events, including business events.

Secondary strengths are food and wine, wildlife, arts and culture, golf and history and heritage. Spa and wellbeing is an emerging product strength, with the development of spa accommodation such as Lon Retreat and Spa.

**TABLE 14** PRODUCT STRENGTHS

| PRODUCT            | GEELONG & THE BELLARINE | MORNINGTON PENINSULA | PHILLIP ISLAND | SURF COAST |
|--------------------|-------------------------|----------------------|----------------|------------|
| Food & Wine        | ●                       | ●                    | ●              | ●          |
| Spa & Wellbeing    | ●                       | ●                    |                | ●          |
| Wildlife           | ●                       | ●                    | ●              | ●          |
| Nature-based       | ●                       | ●                    | ●              | ●          |
| Arts & Culture     | ●                       | ●                    |                |            |
| Indigenous         |                         |                      |                | ●          |
| Golf               | ●                       | ●                    |                | ●          |
| Adventure          |                         |                      |                | ●          |
| History & Heritage | ●                       |                      |                | ●          |
| Festivals & Events | ●                       | ●                    | ●              | ●          |
| Business Events    | ●                       | ●                    | ●              |            |
|                    | ● PRIMARY               | ● SECONDARY          | ● EMERGING     |            |

#### 4.2.2. NICHE PRODUCT STRENGTHS

The Greater Geelong and The Bellarine region has a number of product strengths that allows the region to market itself to niche product markets that may cut across various psychographics segments. Targeted development and marketing of product within these niche product areas could lead to greater market capture. Niche product markets include:

- Golf;
- Cycling;
- Recreational fishing and boating;
- Business events and MICE;
- Diving;
- Weddings; and
- Signature events.

**Further investigation of these markets by Geelong and the Bellarine should be undertaken in order to target them effectively**

### 4.3. PRODUCT DISPERSAL

#### 4.3.1. ACCOMMODATION

An accommodation product audit of the Greater Geelong and The Bellarine region counted 257 establishments across a range of accommodation types, with a total of 5,590 rooms (including caravan sites). This includes approximately 40 new accommodation establishments.

A profile of accommodation types is shown below in Table 15. This audit focuses on commercial accommodation and not Air B&B or holiday home rentals.

Table 16 shows that the majority of accommodation establishments are located in the Queenscliff and Point Lonsdale tourism sub-region, followed by Geelong Urban. Accommodation establishments in Queenscliff and Point Lonsdale are mostly single Self-contained/Holiday Home establishments, followed by B&B/Guest House, whereas Geelong Urban offers predominately larger Hotel/Motel accommodation. (Note: Self-contained/Holiday Home establishments included in the product audit were listed commercially for rent; private holiday home accommodations were not included.)

There is a clear lack of accommodation establishments located in the Avalon & the You Yangs and the Southern Golden Plains sub-regions.

Across Greater Geelong and The Bellarine region, there is a low supply of Resort, Farm Stay and Backpacker accommodation establishments

**TABLE 15** PROFILE OF ACCOMMODATION, GEELONG AND BELLARINE REGION

| Type of Accommodation           | Number of Establishments | % of Total Establishments | Rooms       | % of Total Rooms | Sites       |
|---------------------------------|--------------------------|---------------------------|-------------|------------------|-------------|
| Camping/Caravan Park/Cabin Park | 21                       | 8%                        | 935         | 30%              | 2515        |
| Self-contained                  | 130                      | 51%                       | 844         | 27%              | 0           |
| Hotel/Motel                     | 37                       | 14%                       | 788         | 26%              | 0           |
| B&B/Guest House                 | 36                       | 14%                       | 192         | 6%               | 0           |
| Apartment/Cottage/Unit          | 27                       | 11%                       | 203         | 7%               | 0           |
| Resort                          | 1                        | 0%                        | 80          | 3%               | 0           |
| Farm Stay                       | 2                        | 1%                        | 4           | 0%               | 0           |
| Backpacker                      | 3                        | 1%                        | 29          | 1%               | 0           |
| <b>Total</b>                    | <b>257</b>               | <b>100%</b>               | <b>3075</b> | <b>100%</b>      | <b>2515</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

**TABLE 16** ACCOMMODATION, ESTABLISHMENTS BY SUB-REGION

| Tourism Region               | Camping/Caravan Park/Cabin Park | Commercial Self-contained | Hotel/Motel | Apartment/Cottage/Unit | B&B/Guest House | Resort   | Farm Stay | Backpacker/Lodge | Total Establishments |
|------------------------------|---------------------------------|---------------------------|-------------|------------------------|-----------------|----------|-----------|------------------|----------------------|
| Avalon & The You Yangs       | 0                               | 1                         | 0           | 0                      | 1               | 0        | 0         | 0                | 2                    |
| Golden Plains South          | 0                               | 1                         | 0           | 2                      | 1               | 0        | 1         | 0                | 5                    |
| Geelong Urban                | 6                               | 21                        | 25          | 6                      | 4               | 0        | 1         | 1                | 64                   |
| Bellarine North              | 3                               | 12                        | 3           | 5                      | 6               | 0        | 0         | 0                | 29                   |
| Bellarine South              | 7                               | 20                        | 3           | 2                      | 6               | 1        | 0         | 0                | 38                   |
| Queenscliff & Point Lonsdale | 5                               | 75                        | 6           | 12                     | 18              | 0        | 0         | 2                | 118                  |
| <b>Total region</b>          | <b>21</b>                       | <b>130</b>                | <b>37</b>   | <b>27</b>              | <b>36</b>       | <b>1</b> | <b>2</b>  | <b>3</b>         | <b>256</b>           |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

**TABLE 17** ACCOMMODATION, ROOMS/SITES BY SUBREGION

| Tourism Region               | Camping/Caravan Park/Cabin Park | Commercial Self-contained | Hotel/Motel | Apartment/Cottage/Unit | B&B/Guest House | Resort     | Farm Stay | Backpacker/Lodge | Total Rooms (incl. sites) |             |
|------------------------------|---------------------------------|---------------------------|-------------|------------------------|-----------------|------------|-----------|------------------|---------------------------|-------------|
|                              | Sites                           | Rooms                     |             |                        |                 |            |           |                  |                           |             |
| Avalon & The You Yangs       | 0                               | 0                         | 14          | 0                      | 0               | 2          | 0         | 0                | 0                         | 16          |
| Golden Plains South          | 0                               | 0                         | 3           | 0                      | 3               | 4          | 0         | 3                | 0                         | 13          |
| Geelong Urban                | 183                             | 500                       | 258         | 634                    | 161             | 15         | 0         | 1                | 8                         | 1760        |
| Bellarine North              | 965                             | 75                        | 102         | 32                     | 8               | 29         | 0         | 0                | 0                         | 1211        |
| Bellarine South              | 1088                            | 219                       | 167         | 71                     | 7               | 18         | 80        | 0                | 0                         | 1650        |
| Queenscliff & Point Lonsdale | 279                             | 141                       | 300         | 51                     | 24              | 124        | 0         | 0                | 21                        | 940         |
| <b>Total region</b>          | <b>2515</b>                     | <b>935</b>                | <b>844</b>  | <b>788</b>             | <b>203</b>      | <b>192</b> | <b>80</b> | <b>4</b>         | <b>29</b>                 | <b>5590</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

Table 18 shows the comparison between commercial guestrooms and camping caravan/sites. Although there is a greater proportion of commercial guest rooms than camping/caravan sites, cabins within caravan parks make up 17% of the total accommodation in the region.

**TABLE 18** ACCOMMODATION, GUEST ROOMS VS. CARAVAN/CAMPING SITES BY SUBREGION

| Sub-region                                  | Commercial Guest Rooms (incl. cabins) |             | Camping/Caravan sites |             |
|---|---------------------------------------|-------------|-----------------------|-------------|
| <b>Geelong &amp; Southern Golden Plains</b> | <b>1606</b>                           | <b>52%</b>  | <b>183</b>            | <b>7%</b>   |
| <i>Avalon &amp; The You Yangs</i>           | <i>16</i>                             | <i>1%</i>   | <i>0</i>              | <i>0%</i>   |
| <i>Golden Plains South</i>                  | <i>13</i>                             | <i>0%</i>   | <i>0</i>              | <i>0%</i>   |
| <i>Geelong Urban</i>                        | <i>1577</i>                           | <i>51%</i>  | <i>183</i>            | <i>7%</i>   |
| <b>The Bellarine Peninsula</b>              | <b>1469</b>                           | <b>48%</b>  | <b>2332</b>           | <b>93%</b>  |
| <i>Bellarine North</i>                      | <i>246</i>                            | <i>8%</i>   | <i>965</i>            | <i>38%</i>  |
| <i>Bellarine South</i>                      | <i>562</i>                            | <i>18%</i>  | <i>1088</i>           | <i>43%</i>  |
| <i>Queenscliff &amp; Point Lonsdale</i>     | <i>661</i>                            | <i>21%</i>  | <i>279</i>            | <i>11%</i>  |
| <b>Total region</b>                         | <b>3075</b>                           | <b>100%</b> | <b>2515</b>           | <b>100%</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

#### 4.4. HOLIDAY HOME ANALYSIS

Private holiday homes make up 6% of the total housing stock within the Greater Geelong and The Bellarine region. Table 19 below shows that the proportion of holiday homes is much larger on the Bellarine Peninsula than the Geelong and Golden

Plains South region, with 42% of housing stock in Bellarine Peninsula being holiday homes, 29% in Bellarine South and 24% in Queenscliff and Point Lonsdale.

**TABLE 19** HOLIDAY HOMES BY SUBREGION

|                                 | Avalon & You Yangs | Golden Plains South | Geelong Urban | Bellarine North | Bellarine South | Queenscliff & Point Lonsdale | Geelong & Bellarine region |
|---------------------------------|--------------------|---------------------|---------------|-----------------|-----------------|------------------------------|----------------------------|
| Number of Private holiday homes | 119                | 119                 | 110           | 2633            | 1804            | 1487                         | <b>6272</b>                |
| Percentage of holiday homes     | 2%                 | 2%                  | 2%            | 42%             | 29%             | 24%                          | <b>100%</b>                |

Source: Data compiled by Urban Enterprise, ABS Census, Occupied dwellings and unoccupied dwellings, 2016.

There are an additional 1,055 Airbnb homes in the Greater Geelong and The Bellarine region. AirBnB is a significant contributor to the tourism economy, however it is highly seasonal in all regions apart from Geelong Urban, which experiences a consistent level of visitation throughout the year. Ocean Grove receives the largest proportion of AirBnB rentals, however this is over the summer period, and over a third of bookings are impromptu (booked between 0-6 days in advance) and are likely to be based on weather.

**Although AirBnB plays a significant role in tourism, it is unregulated and disconnected from tourism in Greater Geelong and the Bellarine. Increased collaboration between AirBnB and the tourism industry and regional tourism board is integral to the expansion of tourism in the region, including the promotion of activities and attractions in the region alongside rental listings and an increase in properties listed year round.**

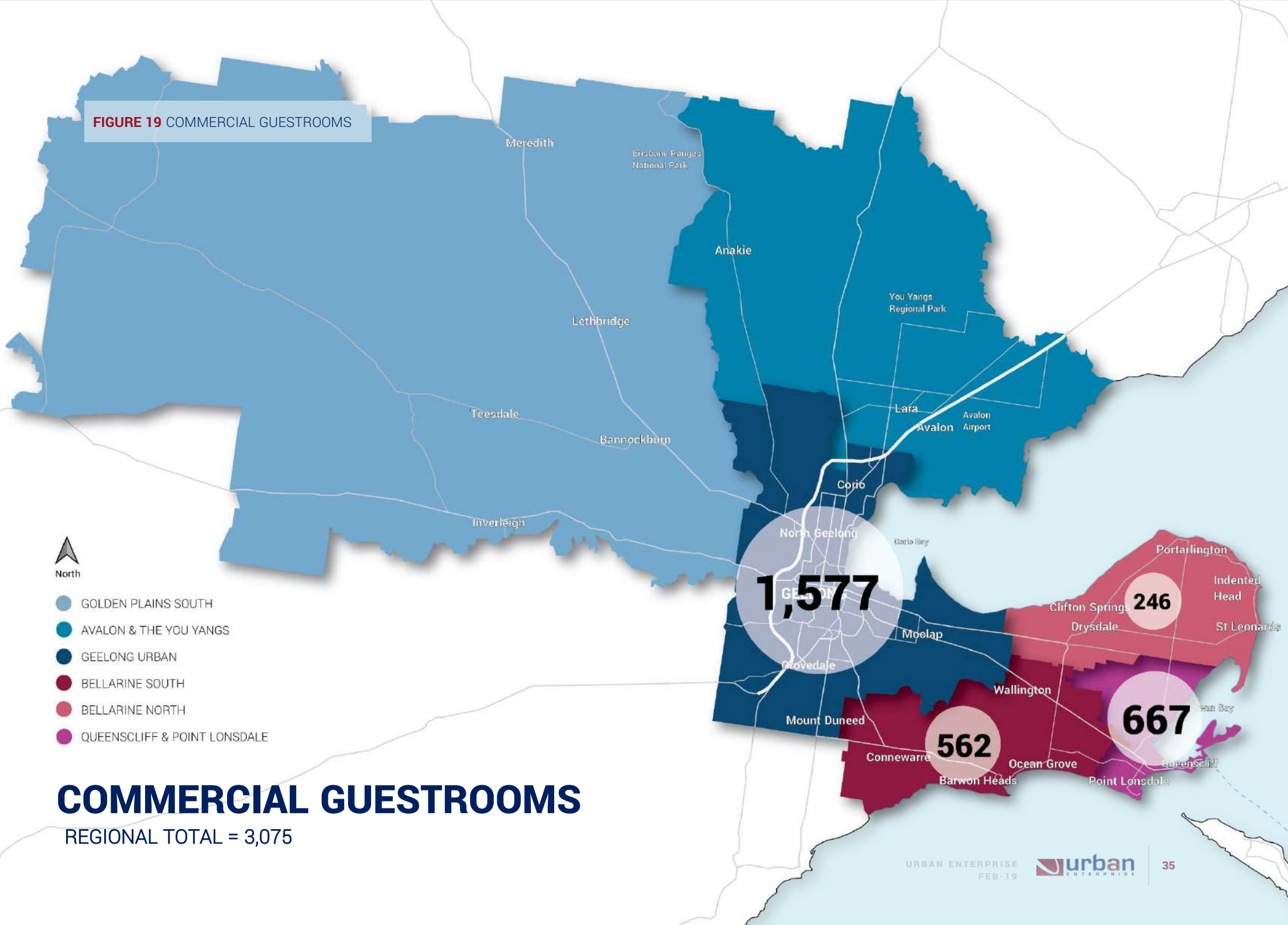
**FIGURE 19** COMMERCIAL GUESTROOMS



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# COMMERCIAL GUESTROOMS

REGIONAL TOTAL = 3,075



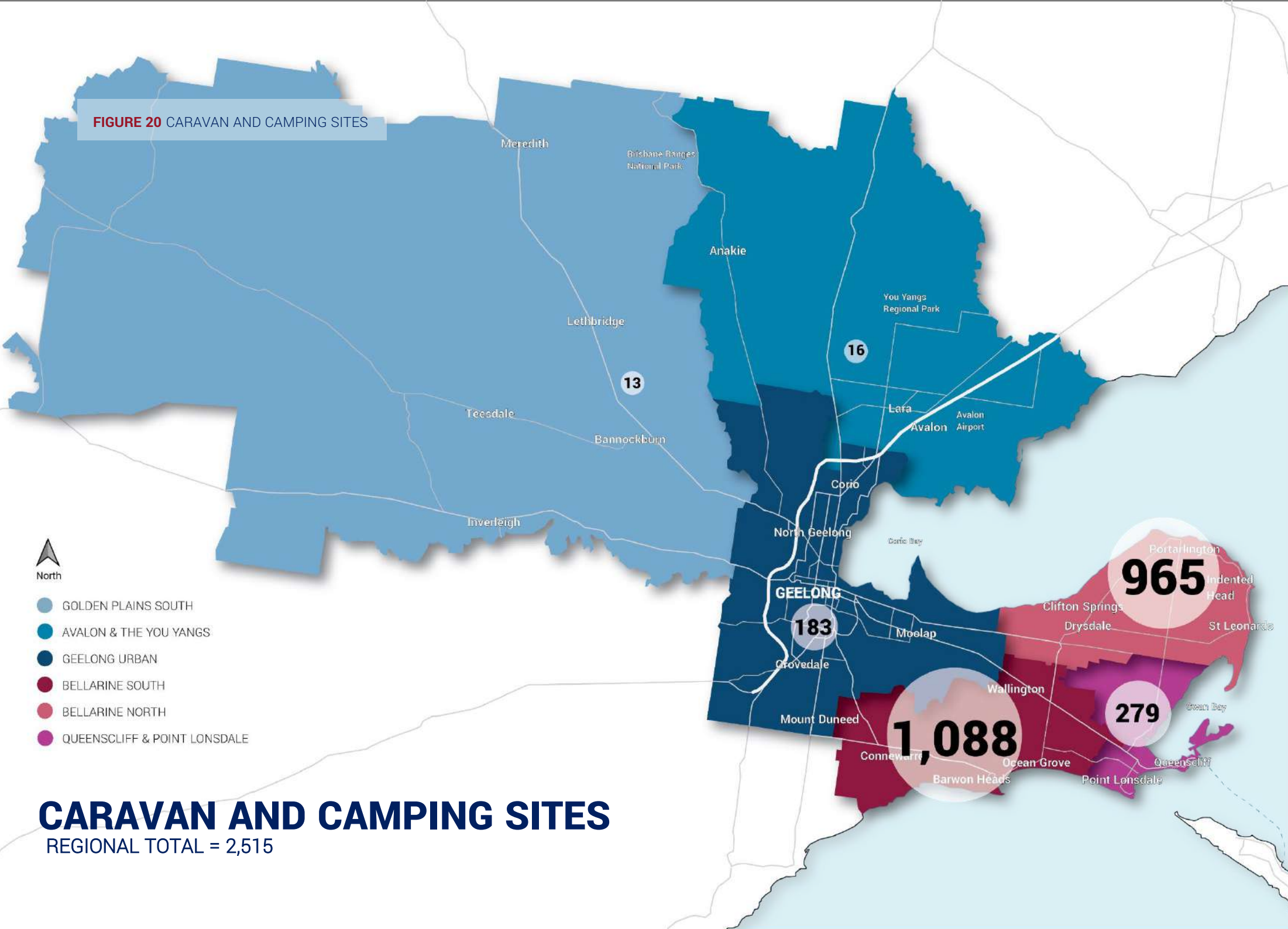
**FIGURE 20** CARAVAN AND CAMPING SITES



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# CARAVAN AND CAMPING SITES

REGIONAL TOTAL = 2,515



#### 4.4.1. BUSINESS AND CONFERENCE MARKET

Business Events Geelong, a division of Tourism Greater Geelong and The Bellarine is the peak body supporting business events in the region. 33 businesses are listed with Business Events Geelong who undertake business events. It is important to note that there are a significant number of other events facilities catering for smaller scale events. Some of the key facilities are listed in Table 20.

Not included are a number of wineries and restaurants that host business events, conferences and other events such as weddings, including Jack Rabbit Vineyard (200 guests), Oakdene Vineyards (380 guests), Provenance wines (380 guests) and 360Q (240 guests).

**Although there are a significant number of event facilities, there is limited events and conference market accommodation in central Geelong to cater for this growing market. Investment in new 4 and 5 star quality accommodation is a key opportunity for Greater Geelong and Bellarine, particularly in the Geelong Urban sub-region.**

**TABLE 20** KEY BUSINESS EVENT VENUES

| Venue                                  | Maximum Room Capacity Indoor (Cocktail) |
|--|---|
| 13 <sup>TH</sup> Beach                 | 340                                     |
| Clyde Park                             | 800                                     |
| Deakin University @ Costa Hall         | 1,500                                   |
| Edge Geelong                           | 330                                     |
| Flying Brick Cider House               | 400                                     |
| Geelong Conference Centre              | 200                                     |
| Geelong Events Centre (Rydges Geelong) | 1,385                                   |
| Geelong Football Club                  | 4,500                                   |
| Geelong Gallery                        | 550                                     |
| Geelong Library and Heritage Centre    | 350                                     |
| Geelong Performing Arts Centre         | 1,100                                   |
| Geelong West Town Hall                 | 430                                     |
| Mt Duneed Estate                       | 450                                     |
| Novotel Geelong                        | 410                                     |
| Queenscliff Town Hall                  | 300                                     |
| Sphinx Entertainment Centre            | 640                                     |
| Terindah Estate                        | 450                                     |
| The Carousel                           | 150                                     |
| The Geelong Arena                      | 2,600                                   |
| The Pier Geelong                       | 1000                                    |
| Vue Grand Hotel                        | 200                                     |
| Wauron Ponds Estate                    | 470                                     |
| Wool Exchange Entertainment Complex    | 950                                     |

#### 4.4.2. NATURE BASED TOURISM

The Greater Geelong and The Bellarine region is not often associated as a nature-based tourism destination when compared with regions like the North East, Gippsland or the Grampians which have large areas dedicated to National Parks. However, Port Phillip Bay which forms a large part of the region is one of Victoria's major natural assets. Port Phillip Bay hosts a wide range of water-based activities including fishing, swimming, boating, water skiing, diving, sailing and kayaking.

The ocean beaches to the south of the region are also popular tourism assets and drive visitation to destinations on the Bellarine Peninsula such as Barwon Heads, Ocean Grove, St Leonards, Queenscliff & Point Lonsdale. As seen in section 3.2.1, 75% of domestic overnight visitors to the Bellarine Peninsula visit the beach.

Other land-based assets include the You Yangs and Brisbane Ranges. Both are home to unique flora and fauna and host bushwalking. The You Yangs also host a high-quality mountain bike facility.

#### 4.4.3. FOOD AND BEVERAGE

Greater Geelong and The Bellarine already has highly regarded wines, however the tourism product that leverages from these wineries is still in its developing stage. There are two main clusters of wineries within the region, which are The Bellarine and the Moorabool Valley. There are also many wineries that are dispersed through the region outside of these two clusters. Key development alongside these wineries would be investment in on site experiential accommodation.

Greater Geelong and The Bellarine region has an emerging food culture throughout Geelong Urban and the region's villages and coastal townships. There has also been investment in dining, farm gate and cellar door experiences in the rural areas and in particular on The Bellarine, highlighted through such initiatives as the Bellarine Taste Trail and the emerging cider house (Flying Brick Cider) and potential for distilleries.

There has been significant expansion of the wine industry as a whole and the region has a growing reputation for quality wine and produce. Some significant new developments and investments include Basils Farm and One Day Estate

There has also been growth in the agri-tourism sector, with the development of smaller businesses collectively driven the region's growth with agri-tourism and boosting the Bellarine Taste Trail offering.

#### 4.4.4. EVENTS AND FESTIVALS

Sport and events are a strong part of the visitor economy in Urban Geelong. This includes amateur sports tournaments, sailing regattas and AFL matches at Kardinia Park. Major cycling events have also been a key feature of Geelong including the Bay Crits and the newly established Cadel Evans Great Ocean Road Race.

Avalon International Air Show is a key international event for the region and has significant visitation. Meredith music festival is a key national event driving visitation in the Geelong and Southern Golden Plains region.

There are a number of signature arts and culture events in the region, including Geelong After Dark and Mountain to Mouth. Geelong After Dark is a one-night event exploring Geelong by night, with interactive art, street performances, exhibitions, food offerings and more. Mountain to Mouth (M~M) is a 2-day arts walking tour beginning in the You Yangs and finishing at the mouth of the Barwon River, lined with edgy artworks commissioned for M~M and stopping at Geelong After Dark overnight.

Table 21 provides an overview of several major events in the region and their impact on the visitor economy. It is important to note that only those events sponsored by Geelong Major Events Committee have been included.

The event with the largest estimated economic benefit to the region in 2017 is the Cadel Evans Great Ocean Road Race (estimated \$10M benefit), followed by the Archibald Prize touring exhibition exhibited at Geelong Gallery (estimated \$7.2M benefit) and the Geelong Revival Motoring Festival (estimated \$6M benefit).



**TABLE 21** MAJOR EVENT IMPACT SUMMARY

| Event Name  | Sponsorship Amount | Estimated Economic Benefit | Estimated Attendees |
|---|--------------------|----------------------------|---------------------|
| 2018 Cadel Evans Great Ocean Road Race                  | \$150,000          | \$10,000,000               | 80,000              |
| 2017 Archibald Prize @ Geelong Gallery                  | \$100,000          | \$7,211,125                | 58,268              |
| 2017 Geelong Revival Festival                           | \$180,000          | \$5,973,091                | 26,430              |
| 2018 Pako Festa   | \$71,050           | \$5,034,593                | 104,592             |
| 2018 Ironman 70.3 Geelong                               | \$150,000          | \$2,622,550                | 10,735              |
| 2018 Victorian Open Golf Tournament                     | \$70,000           | \$2,591,216                | 21,426              |
| 2017 AFL Masters National Carnival                      | \$40,000           | \$2,154,684                | 1,793               |
| 2018 Geelong After Dark & M~M                           | \$20,000           | \$2,136,540                | 30,644              |
| 2018 National Celtic Festival                           | \$40,000           | \$2,136,126                | 18,102              |
| 2018 Head of the Schoolgirls Regatta                    | \$22,292           | \$2,017,536                | 9,900               |
| 2018 BBL Melbourne Renegades @ GMHBA Stadium            | \$20,000           | \$1,419,066                | 25,000              |
| 2018 U18 National Basketball Championships              | \$15,000           | \$1,368,598                | 2,851               |
| 2017 Targa Florio Australian Tribute                    | \$50,000           | \$1,164,368                | 2,430               |
| 2017 Southern University Games                          | \$35,000           | \$1,152,323                | 1,699               |
| 2018 Wooden Boat Festival                               | \$20,000           | \$1,000,000                | 10,000              |
| 2017 Australian Squash Championships                    | \$5,000            | \$898,011                  | 765                 |
| 2018 SuperFoiler Grand Prix                             | \$40,000           | \$893,741                  | 4,676               |
| 2018 Aust Women's Baseball Championships (Youth & Open) | \$12,000           | \$834,447                  | 656                 |
| 2018 Great Australian Beer Festival                     | \$20,000           | \$827,594                  | 4,755               |
| 2018 A-League Melbourne Victory @ GMHBA Stadium         | \$45,000           | \$714,615                  | 6,682               |
| 2017 FFA Australia v China @ GMHBA Stadium              | \$30,000           | \$646,351                  | 6,406               |
| 2017 Toast To The Coast                                 | \$25,000           | \$540,533                  | 6,154               |
| 2018 Lara Food & Wine Festival                          | \$15,000           | \$454,203                  | 6,405               |
| 2017 Word for Word Festival                             | \$12,500           | \$329,314                  | 2,608               |
| 2018 Geelong Highland Gathering                         | \$12,000           | \$235,112                  | 2,146               |
| 2018 Festival of Sails                                  | \$203,000          | \$10,281                   | 53,717              |

Source: Geelong Major Events Annual Report to Council, 2018.

#### **4.4.5. HISTORY AND HERITAGE**

Geelong Urban has a number of heritage attractions including the National Wool Museum, Geelong Maritime Museum, the Barwon Grange and The Heights heritage properties Geelong Museum of Motoring and Industry, Geelong Carousel, Geelong Heritage Centre, and the Old Geelong Gaol.

The industrial backdrop of Geelong also provides an interesting built form for new development. This has already been utilised in recent developments such as Deakin University, the Little Creatures Brewery, and in the industrial areas of the suburb of Newtown, where establishments such as the Boom Gallery and other arts and design professionals are bringing new life to the area.

The seaside township of Queenscliff is a well-regarded maritime heritage village and includes attractions such as the maritime museum. Further investment is proposed for Fort Queenscliff, Queenscliff Maritime Museum and the Lighthouse Reserves which will provide contemporary heritage visitor experiences.

#### **4.4.6. ARTS AND CULTURE**

Geelong is being increasingly recognised as a key regional arts and culture region, with significant investment in galleries, performing arts, cultural facilities and significant cultural events.

A detailed overview of the arts and culture scene in Geelong Urban can be found in section 7 Geelong Urban subregional profile.

## 5. TRANSPORT, INFRASTRUCTURE AND ACCESS

### 5.1. INTRODUCTION

This section of the report provides an assessment of the transport linkages and access characteristics of the Greater Geelong and the Bellarine region. This section is intended to be used to identify potential gaps in access to the region as well as strategic opportunities for transport network improvements.

The map on the following page provides an overview of the key transport infrastructure in the Greater Geelong and The Bellarine region. The map includes key road networks, the rail network and train stations, airports, harbours, bicycle trails, ferries and key transport hubs.

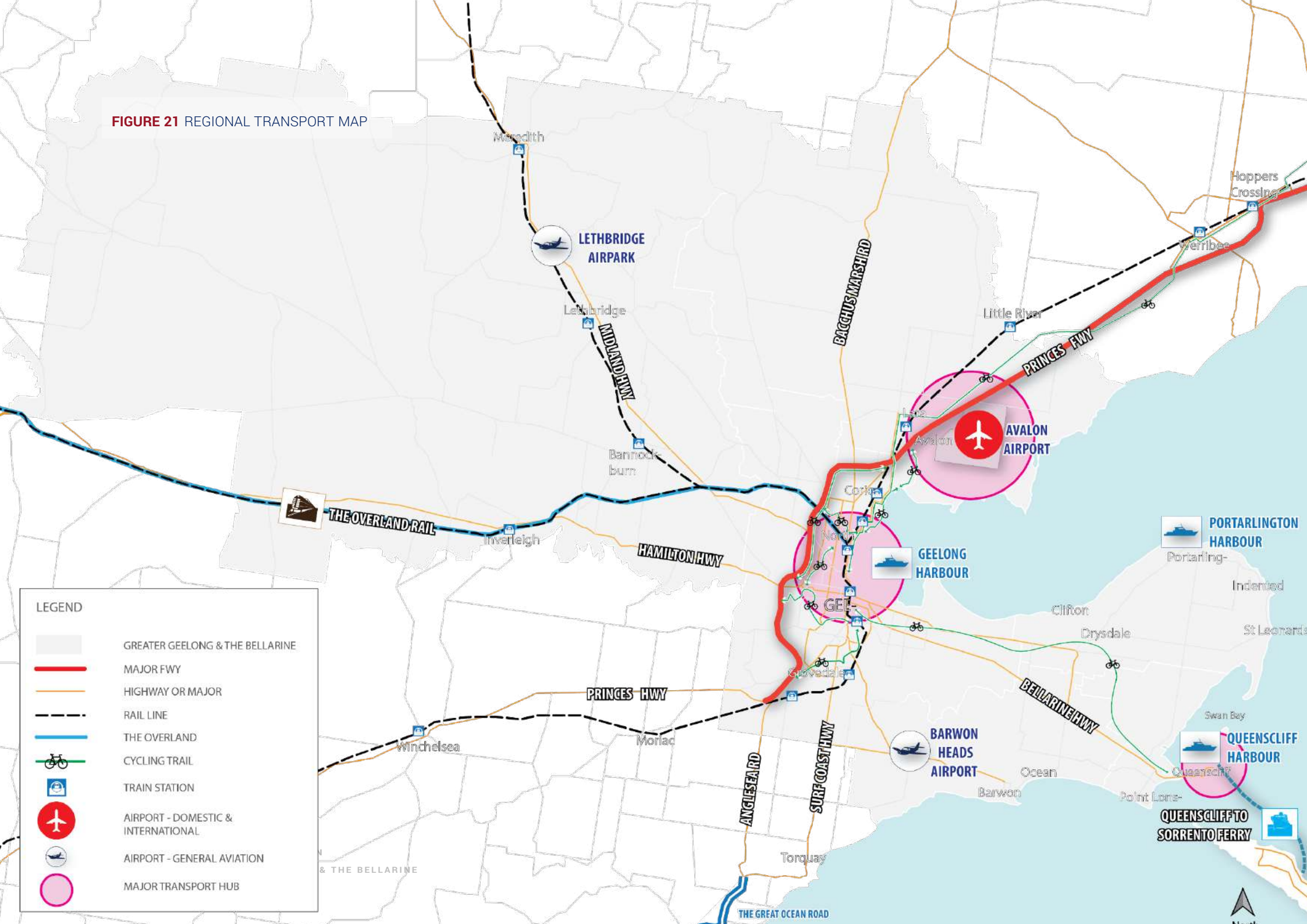
### 5.2. KEY FINDINGS

**The Greater Geelong and The Bellarine region is well serviced by a range of transport infrastructure. The region is accessible by air, sea, rail and road.**

**There are however a number of gaps in the transport links and improvements that require investment to improve visitor access and potentially grow visitation to the region. This includes:**

- **Investment in rail linkages to Avalon Airport and attraction of further international carriers;**
- **High-speed rail proposals;**
- **Completion of Portarlington Harbour redevelopment; and**
- **Investment in the Queenscliff – Sorrento Ferry terminal;**

**FIGURE 21** REGIONAL TRANSPORT MAP



**LEGEND**

-  GREATER GEELONG & THE BELLARINE
-  MAJOR FWY
-  HIGHWAY OR MAJOR
-  RAIL LINE
-  THE OVERLAND
-  CYCLING TRAIL
-  TRAIN STATION
-  AIRPORT - DOMESTIC & INTERNATIONAL
-  AIRPORT - GENERAL AVIATION
-  MAJOR TRANSPORT HUB

### 5.3. STRATEGIC CONTEXT

#### REVITALISING CENTRAL GEELONG ACTION PLAN

The Revitalising Central Geelong Action Plan sets out initiatives designed to turn central Geelong into a magnet for new jobs, growth and investment. The Action Plan will coordinate state and local government involvement in central Geelong – providing focus for structural, policy and physical changes necessary to attract private sector investment and stimulate growth.

The initiatives in the Action Plan fall into five areas of activity. These are:

- **Investment attraction:** The identification and delivery of ‘seed’ projects and identification and removal of barriers to private sector investment.
- **Land development:** Land acquisition and assembly ready for development.
- **Planning certainty:** Review and streamlining of the development approval process.
- **Infrastructure design and delivery:** Infrastructure provision and/or upgrade.
- **People and place:** Improvements to public infrastructure and streets.

This includes a number of key transport, infrastructure and accessibility projects to support the development of the region.

#### DESTINATION ACCESSIBLE

Tourism Greater Geelong and the Bellarine is working in partnership with the Australian Federation of Disability Organisations (AFDO), with an aim to developing Greater Geelong and the Bellarine into a more accessible destination, a more welcoming place for people with disabilities and promoting the idea of accessible tourism.

The strategy includes a program whereby tourism businesses can have their business assessed by an AFDO representative to discuss current business operations, complete a disability-friendly check and makes recommendations on a range of practical, impactful changes that can be made to the business.

This initiative will greatly increase the accessibility of tourism throughout the region, which will in turn increase the number of visitors to the region by enabling those with a disability who are inhibited by accessibility barriers.

Key outcomes of the program include:

- 450 businesses receive information or attend training session;
- 110 businesses undertake 1:1 mentoring; and
- 70 people with a disability are assisted into employment.

### 5.4. TRANSPORT INFRASTRUCTURE, ROUTES AND MODES

Greater Geelong and The Bellarine is well serviced by major transport infrastructure, including road, rail and water transportation both to access the region and for transport within the region. These transport modes are analysed below.

#### 5.5. ROADS

The major access road to the region is the Princes Freeway, this is a 6-lane divide freeway providing direct access from Melbourne to the region. Use of the freeway to access Geelong takes approximately 1 hour. The Princes Freeway connects to the Geelong Ring Road (Geelong bypass), as well as provides direct access to the Midland Highway and Hamilton Highway.

The construction of the Geelong bypass has removed through traffic from Geelong. The Geelong Ring Road links to the Hamilton Highway and to the Princes Highway, which is also used to access the Surf Coast Shire. Works are currently underway to upgrade freight connections from the Geelong Ring Road to the Port of Geelong, in order to support the increased volume of freight traffic in the area since the construction of the Geelong Ring Road in 2013.

The Midland Highway is an important link between Golden Plains Shire and Geelong. Planning for the duplication of the Midland Highway between Geelong and Bannockburn is underway and funding is required to complete road construction.

Other major roads in the region connecting to the north and west include the Midland Highway and the Hamilton Highway. The Bellarine Highway, Barwon Heads Road and Portarlington Road are the major roads on the Bellarine Peninsula linking to Central Geelong. Construction of the Drysdale bypass is expected to begin in 2019, which will connect to Portarlington Road to redirect traffic from the Drysdale town centre.

### **DRYSDALE BYPASS**

The State government has allocated \$117 million to construction of the Drysdale Bypass, which will be approximately six-kilometres long from Jetty Road to north of Whitcombes Road. Construction work has commenced on Whitcombes Road, and the Bypass is expected to be complete by mid-2020. The bypass will provide significantly improved access to and from the town centre, and the removal of some through traffic and heavy vehicles from the Drysdale town centre could have positive impacts for the hospitality and tourism role of the town centre.

### **WAURN PONDS DUPLICATION PROJECT**

Planning is currently underway to identify a preferred alignment for the construction of a rail link from Marshall Station to Armstrong Creek, as part of the Waurn Ponds Duplication Project. The State Government has commenced securing land for the new rail link and has begun planning for construction of the rail link.

The Waurn Ponds Duplication Project is expected to create almost 1,300 jobs, with work to start in 2020 and finish by 2023.

## **5.6. AIRPORTS**

Greater Geelong and The Bellarine is well serviced for air travel with one major airport at Avalon and two smaller regional airports at Lethbridge and Barwon Heads.

**Greater Geelong and The Bellarine is well serviced by airport infrastructure. The recent development of Avalon airport international terminal will provide a significant asset to leverage increased visitation (both domestic and international) to the Greater Geelong and The Bellarine region. The construction of the Avalon Rail Link is a priority project to grow the role of the Avalon Airport. Both Barwon Heads Airport and Lethbridge Airport play a vital role in servicing the region for recreational and tourism flying services.**

### **5.6.1. AVALON AIRPORT**

Avalon Airport is the region's major airport and Victoria's second largest airport. The airport was purchased by Linfox Group in 1997 from the Commonwealth, and Jetstar began operating from the facility in 2004. The Airport is a commercial airline facility operating a domestic airline terminal, with the recent development of an international terminal as of December 2018.

Air Asia has signed a 10-year deal with Linfox Group, and launched its first international services from Avalon Airport in December 2018, providing twice daily flights to Kuala Lumpur. It is expected that this new service will bring 500,000 passengers in the first year.

The Airport is located approximately 55 kilometres from Melbourne (40 minutes by car) and 20 kilometres from the Geelong CBD (15 minutes by car). The Airport offers bus transfers to Geelong, the Bellarine, the Surf Coast, Werribee and Melbourne.

Furthermore, the State Government has committed to supporting Avalon Airport as the host of the Australian International Airshow until 2025, which will bring large numbers of visitors into the region.

## PASSENGER MOVEMENTS

The Avalon Airport Master Plan provides forecasts of passenger movements through Avalon Airport to 2030/31. These are shown below. Passenger numbers are expected to increase to over 9 million in 2030/31, 7 million of which are domestic passengers and 2 million international passengers. The significant number of passenger movements provides a strong opportunity for the region to leverage increased tourism visitation and development of tourism infrastructure and product catering to the international market.

| Year    | International | Domestic  | Total     |
|---------|---------------|-----------|-----------|
| 2018-19 | 489,000       | 1,964,000 | 2,454,000 |
| 2023-24 | 960,000       | 3,559,000 | 4,519,000 |
| 2029-30 | 1,926,000     | 6,466,000 | 8,393,000 |
| 2030-31 | 2,196,000     | 7,248,000 | 9,444,000 |

Source: The Bureau of Infrastructure, Transport and Regional Economics (BITRE) – Avalon Airport Master Plan, 2015.

### 5.6.2. OTHER AIRPORTS

#### BARWON HEADS AIRPORT

The Barwon Heads Airport is a public use, private airfield. It is located on Barwon Heads Road, approximately 14 km south east of Geelong. The airport is well located to provide aeronautical tourism for The Bellarine as well as the Great Ocean Road Region. The airport includes commercial tourism related operations, including:

- Skydiving;
- Helicopter flights; and
- Aerobatic flights (Warbird Adventure Flights).

#### LETHBRIDGE AIRPORT

The Lethbridge Airport is located approximately 33 km north west of Geelong on the Midland Highway. It is home to numerous businesses and clubs that cover a range of activities including joy flights, flying lessons and plane building. The Lethbridge Airport is strategically located to service the northern and western regions of Greater Geelong and The Bellarine as well as beyond the region.

Lethbridge airport is currently under development, with completed development of new infrastructure including:

- a new sealed runway and hardstand area
- taxiway and apron upgrades, and
- installation of self-service fuel infrastructure.

### 5.7. RAIL

The map on the following page provides an overview of the train lines that operate in Victoria and Greater Geelong and The Bellarine's connection with Victoria's regions through rail infrastructure. The Greater Geelong and The Bellarine region is well supported by rail infrastructure with V/Line operating passenger services between the Greater Geelong and The Bellarine and Melbourne. Geelong acts as a central hub for multiple train lines. Geelong is also a central hub for passenger train services to Western Victoria, including services to Warrnambool and Ararat.

Great Southern Rail operate The Overland, a passenger service between Melbourne and Adelaide, via North Shore Station in Geelong. The Overland operates from Adelaide to Melbourne on Mondays and Fridays and from Melbourne to Adelaide on Tuesdays and Saturdays. The Overland also provides a motorail service, where passengers can transport their vehicles on board the train.

Services depart from North Shore Geelong at 9.42 on Tuesdays and Saturdays and arrive at Adelaide at 5.53pm. The fares for The Overland for 2018/19 are shown in Table 22. A single one-way adult ticket ranges from \$159 (red service) to \$2599 (red premium service).

**TABLE 22** THE OVERLAND FARES

| \$ Per Person One Way   | Everyday | Pension Saver | Ready Rail | Ready Rail SAVER |
|---|----------|---------------|------------|------------------|
| Adelaide-North Shore<br>Geelong/Melbourne or vv - Red Service                                   | 159      | 79            | 109        | N/A              |
| Adelaide-North Shore<br>Geelong/Melbourne or vv - Red<br>Premium Service (all-inclusive dining) | 259      | 209           | 209        | 159              |

Source: Great Southern Rail Fares 2018/19

\* Fares based on twin share per person with single supplements applicable

**FIGURE 22** GEELONG & BELLARINE REGIONAL TRAIN NETWORK CONNECTIONS



Source: Urban Enterprise, 2018.

Geelong has direct rail services linking to Melbourne, however the V-Line rail system is at capacity and the railway line is not meeting the demands of users. Further rail services and fast rail are options being considered by State Government.

The Overland is the predominant tourism train service in the region connecting Adelaide and Melbourne, via North Shore Geelong. The construction of the Avalon Rail Link will provide a critical link to the existing rail network.

## 5.8. WATER TRANSPORT AND INFRASTRUCTURE

### 5.8.1. QUEENSLIFF TO SORRENTO SEAROAD FERRY

The Queenscliff to Sorrento car and passenger Searoad Ferry is a critical piece of sea transport infrastructure connecting The Bellarine with the Mornington Peninsula. The ferry carries over 900,000 people and 250,000 vehicles per year. The journey takes approximately 40 minutes and departs on the hour, everyday between 7am and 6pm. The equivalent journey via road takes approximately 2 hours and 45 minutes. The ferry provides an efficient and interesting mode of transportation between the Mornington Peninsula and The Bellarine.

The Searoad ferry is a tourist attraction in its own right, providing views of The Bellarine Peninsula, Mornington Peninsula and landmarks throughout Port Phillip Bay.

Package deals are also provided through the Searoad website, including packages with Flying Brick Cider House and Bellarine Railway. These deals provide incentives to visitors to utilise the Searoad ferry as well as increase visitation to destinations and attractions in Greater Geelong and The Bellarine.



### 5.8.2. GEELONG HARBOUR

Geelong harbour is the largest harbour in the Greater Geelong and The Bellarine region, where cruise ships and recreational boats moor. The Geelong Harbour includes the Royal Geelong Yacht Club, Cunningham Pier, the Geelong Star and the Eastern Beach precinct, including the Eastern Beach recreation reserve, playground and children's swimming pool.

Although cruise ships currently visit Geelong, an increase in the infrastructure capacity would significantly increase the capacity of cruise ships to visit the region each year, bringing with it an influx of visitors and expenditure.

Port Phillip Ferry Services have recently announced a ferry service between Geelong and Melbourne, which will begin in 2019 and will provide alternative and luxury travel options for tourists and residents alike.

### 5.8.3. QUEENSLIFF HARBOUR

Queenscliff Harbour offers 6 to 25 metre marina berths, drystack facilities, 150 metre travelift, serviced boatyard, mechanical and maritime services. The harbour is also a hub for tourism activity including various water based commercial tourism businesses, shops, cafes and restaurants. Activities at the harbour include boat hire, charters (fishing, diving, nature-based tours), various restaurants and retailers and events. There is also a 42-metre observation tower that offers 360-degree views across Port Phillip, Port Phillip Heads, The Bellarine and Mornington Peninsula.

Importantly, Queenscliff Harbour is the destination for the Queenscliff to Sorrento searoad ferry. Appropriate tourist information and services are required for inbound visitors. This information should be aimed at enticing visitors to increase stopovers, length of stay and expenditure.

### 5.8.4. PORTARLINGTON HARBOUR

Portarlington Harbour is a key hub harbour for the seafood industry. The harbour is currently undergoing a major redevelopment under the Portarlington Safe Harbour

project. Stage One infrastructure upgrades were officially completed and opened in December 2017. These included:

- A new commercial berthing wharf including 190 metres of new berthing;
- Construction of 270 m and 370 m rock breakwaters; and
- Additional wave protection works, mooring facilities and ferry pontoon.

**Geelong Harbour provides significant opportunity to establish itself as Victoria's second largest cruise ship destination through the development of Yarra Street Pier. This project would significantly increase the number of visitors and visitor expenditure across Greater Geelong and The Bellarine. It would also create opportunities to leverage new tourism product and infrastructure in the region.**

**The role of Queenscliff and Portarlington Harbours as recreational and tourism hubs should be increased. Projects such as the Portarlington Safe Harbour Project are important in creating further recreational and tourism opportunities in these harbours.**



### 5.9.2. BELLARINE BUS NETWORK

Figure 24 shows the coverage of the public bus network across The Bellarine Peninsula. Comparatively, The Bellarine is less serviced by bus transportation than Geelong. There are two key bus routes, one to the north and one to the south. It is evident from the map that there are no north south bus connections.

FIGURE 24 BELLARINE BUS NETWORK COVERAGE



Source: Bus Routes sourced from Public Transport Victoria

## 5.10. RECREATIONAL CYCLING TRAILS

### OVERVIEW

Cycling to Geelong from Melbourne takes approximately 3 to 4.5 hours (google maps approximate time) and primarily follows Old Melbourne Road, adjacent to the Princes Freeway.

Off road cycling routes are an important tourism asset, particularly when co-located with complementary tourism product, such as nature-based tourism assets and end of ride facilities. The majority of cycling trails are located within the central Geelong area, with The Bellarine Rail Trail providing cycling access to The Bellarine. The map opposite shows the key cycling trails, an overview of these trails is provided below.

### TED WILSON TRAIL

The Ted Wilson Trail follows the alignment of the Geelong Ring Road. The trail is a shared path, approximately 12 km long and provides stunning views. The Ted Wilson trail links to the Bay Trail and Cowies Creek Trail.

### BAY TRAIL

The Bay Trail follows the foreshore of Corio Bay from Rippleside Park in Drumcondra to Eastern Beach. The trail consists of shared paths as well as on road routes. The northern section of the trail connects with Cowies Creek Trail and the Ted Wilson Trail.

The southern section of the trail provides access to the Geelong Waterfront area, with a large quantity of tourism related attractions and infrastructure including Eastern Beach and the Baywalk Bollards.

### COWIES CREEK TRAIL

The Cowies Creek Trail runs along Cowies Creek for approximately 4 km and links the Ted Wilson Trail with the Bay Trail. The Trail runs through the Fountain of Friendship Park and provides access to the Bell Post Hill Shopping Centre, Corio Leisuretime Centre and skate park.

### TOM MCKEAN TRAIL

The Tom McKean Trail follows a disused rail line and the Tom McKean Linear Park. The trail connects to the Barwon River Trail.

### BARWON RIVER TRAIL

The Barwon River Trail is a loop trail, approximately 20 kilometres long that follows the Barwon River. The trail provides a picturesque setting along the banks of the Barwon River and links to a number of recreation reserves. The trail includes access to parks, playgrounds, golf courses, wetlands and sanctuaries.

### BELLARINE RAIL TRAIL

The Bellarine Rail Trail is a 35-kilometre trail that follows the historic Geelong to Queenscliff Railway Line. The trail is constructed of compacted, crushed rock and is suitable for all bikes apart from those with racing tyres. The trail provides access to tourism attractions on The Bellarine Peninsula and provides views to the surrounding farmland and coast.

### WAURN PONDS CREEK TRAIL

The Waurn Ponds Creek Trail is approximately 6.4 km long, traversing the Waurn Ponds Creek. The trail provides pleasant surroundings for cyclists and pedestrians and provides access to various reserves, shopping centres and cinemas, the Geelong regional baseball centre and the Waurn Ponds skate park.

### YOU YANGS REGIONAL PARK TRAILS

The You Yangs Regional Park includes a network of purpose-built mountain biking tracks of varying lengths and levels from easy open dirt roads, to technical single-track and extreme downhill. The tracks are discussed further in Section 12.

**The majority of recreational cycling routes are located within Geelong. There is opportunity to increase the number of regional trails throughout the Geelong and the Bellarine that take advantage of unique and picturesque landscapes. These would need to be supported by appropriate trail infrastructure. Further development**

of cycling route infrastructure across the region, including upgrading paths, linking key trails through off road routes and signage would enhance the opportunity to draw in niche cycling visitor markets. Recreational cycling trails should be appropriately marketed through destination websites.

Road cycling would be improved in the region with sealed shoulders along key cycling routes.

## 5.11. TOURING ROUTES

The following touring routes have been found through desktop research into self-drive touring routes across the Greater Geelong and The Bellarine region.

### GEELONG AND THE BELLARINE TOURING ROUTE (VISIT VICTORIA)

The touring route follows the following path:

- Melbourne to Geelong (73 kilometres), includes attractions/stops:
  - Werribee Park Mansion, Werribee Open Range Zoo, Geelong (Geelong Waterfront, National Wool Museum);
- Geelong to Queenscliff (31 kilometres), including attractions /stops:
  - Bellarine Taste Trail, Geelong Wine Region, Portarlington, Queenscliff (historic Fort Queenscliff, Maritime Museum, diving, fishing cruise);
- Queenscliff to Point Lonsdale (5 kilometres), includes attractions/stops:
  - Point Lonsdale, the Rip.
- Point Lonsdale to Barwon Heads (20 kilometres, includes attractions/stops:
  - Golf, fishing, site seeing.

### THE BELLARINE TASTE TRAIL

The Bellarine Taste Trail provides a self-guided or tour guided food and beverage experience across The Bellarine. The Bellarine Taste Trail provides sample itineraries covering specific experiences such as 'Food and Wine', 'Wineries', 'Seafood Experiences', 'Families', 'Couples', 'Girls Getaways', 'Blokes Breaks', 'Romance' and 'Quick and Organised'.

### CONNECTION TO TOURING ROUTES

Greater Geelong and The Bellarine has a long relationship as a partner of Great Southern Touring Route focused on the South West of Victoria. In addition, Greater Geelong and The Bellarine is part of Sydney to Melbourne Touring Route and is also reference and partnered with Melbourne to Adelaide Touring Route.

**Self-drive touring routes are limited in the region. There could be the possibility to develop further product and experience-based itineraries such as The Bellarine Taste Trail. Other itineraries could be history and heritage focussed.**

## 5.12. INFRASTRUCTURE OPPORTUNITIES

The following have been listed as key infrastructure development opportunities for the Greater Geelong and Bellarine tourism region.

- Construction of an Avalon Airport rail link;
- Development of Geelong Convention and Exhibition Centre;
- Redevelopment of Geelong Waterfront into a Safe Harbour Precinct;
- Investigation and development of fast Rail to Geelong;
- Development of cruise ship infrastructure along Geelong Waterfront;
- Investment into tracks and trails in Queenscliff and Point Lonsdale;
- Expansion and redevelopment of Lethbridge Airport;
- Development of an iconic Barwon Coast walking trail; and
- Development of Portarlington Safe Harbour.

Secondary infrastructure opportunities have been identified as:

- Gateways and signage improvement for Geelong Urban;
- Planning study to reimagine the Geelong Port foreshore;
- Road cycling maps and app development for Geelong Urban;
- Improvement to the cycling and walking trails network in Bellarine North; and
- Wayfinding signage in Bellarine South.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



## 6. PROJECTED DEMAND

### 6.1. INTRODUCTION

This section provides modelling to determine projected demand for tourism product in Greater Geelong and The Bellarine region. This draws on modelling of visitation and identifies what this means in terms of demand for accommodation and other activities and product in the region.

### 6.2. KEY FINDINGS

**Urban Enterprises demand modelling for future visitation utilises four scenarios including, historic visitation, Visit Victoria forecasting, population growth rate and Tourism Research Australia forecasts. The mid-point forecast of these scenarios shows that visitation to Greater Geelong and the Bellarine is projected to increase from 5.8 million visitors in 2018 to 7.5 million visitors by 2027.**

Utilising this forecast, there will be a need to deliver an additional 1564 guest rooms in the Geelong and Bellarine region to ensure that the region's tourism potential is met.

To meet projected need from overnight visitors investment in accommodation should occur in the following:

- Boutique guest house and self-contained accommodation;
- Quality contemporary budget accommodation;
- Large self-contained accommodation/ serviced apartments;
- Boutique hotels;
- 4.5-5 star branded hotels;
- Caravan and camping ground/tourist park;
- Integrated Resorts; and
- Experiential accommodation:
  - Quality Farm Stay
  - Golf Course
  - Wineries
  - Nature-based

### 6.3. FORECAST VISITATION

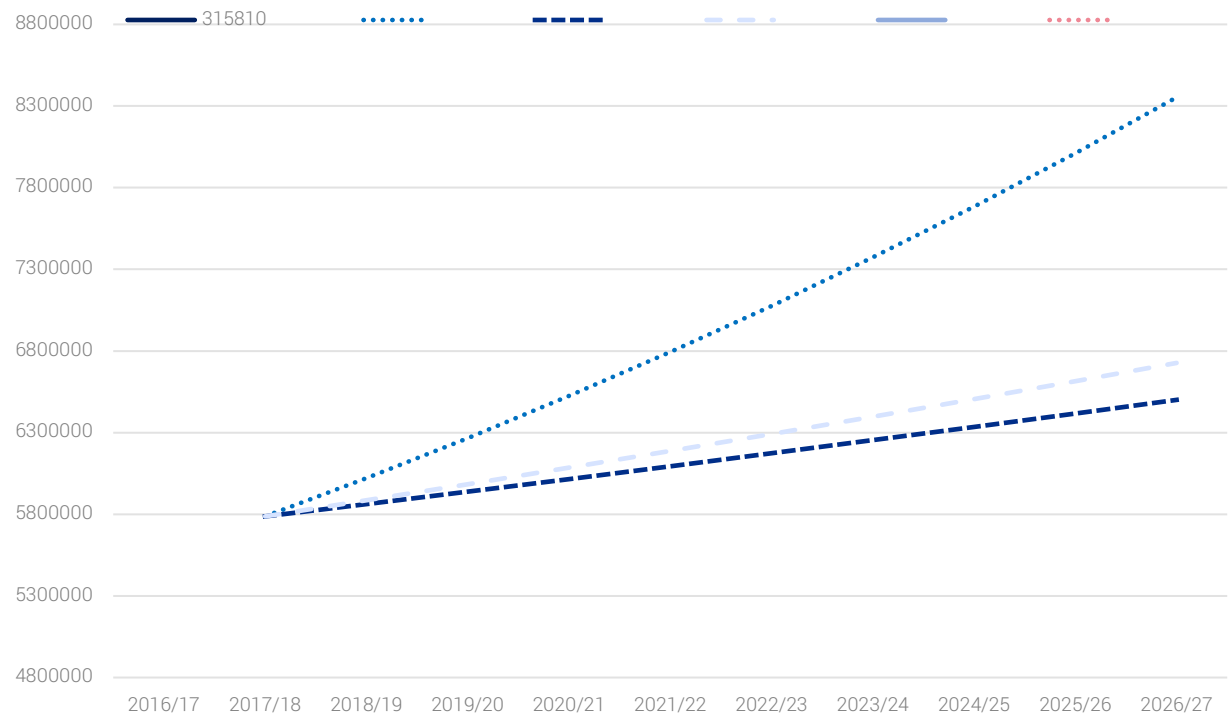
Visitation forecasts are based on the PAVE visitation model which found that in 2018 Greater Geelong and The Bellarine Region attracted 2.3 million overnight and 3.4 million daytrip visitors (both international and domestic visitors).

Three growth scenarios are used to forecast visitor growth. These include:

- Scenario 1: Historical visitation growth model;
- Scenario 2: Tourism Victoria forecast model;
- Scenario 3: Population growth rate model; and
- Scenario 4: Tourism Research Australia forecast model.

The adopted growth rate (mid-point) projects visitation to 7,515,124.

**FIGURE 25** FORECAST VISITATION, GREATER GEELONG AND THE BELLARINE REGION





## 6.4. ACCOMMODATION NEEDS FORECAST

In 2014 there was a total 1,075,134 visitors staying in paid accommodation across Greater Geelong and The Bellarine region<sup>8</sup>. Utilising the visitor growth rates above, it is estimated that there will be an additional 157,795 – 304,575 visitors staying in paid accommodation by 2030.

Based on the projected growth of visitors staying in paid accommodation, Table 23 provides a forecast for accommodation needs.

The analysis utilises the following assumptions:

- Average length of stay per visitor is 3.3 nights;
- Average of 1.7 visitors per room; and
- Average room occupancy of 60% across the year.

This is based on data sourced from National Visitor Survey and ABS Survey of Tourist Accommodation.

Based on this analysis, future additional accommodation needs for the Greater Geelong and Bellarine Region between 2018-2027 is between 1,175 and 2,409 rooms.

**TABLE 23** PROJECTED DEMAND FOR ROOMS/SITES BASED ON VISITOR FORECASTS 2018-2027

|                                      | Low Growth Rate | High Growth Rate | Mid-Point Growth Rate |
|--------------------------------------|-----------------|------------------|-----------------------|
| Visitor growth 2018-2027             | 157,795         | 304,575          | 197,645               |
| Visitor nights                       | 520,722         | 1,005,099        | 652,230               |
| Room nights                          | 306,307         | 628,187          | 407,644               |
| Rooms                                | 839             | 1,721            | 1,117                 |
| Supportable Rooms (at 60% occupancy) | 1,175           | 2,409            | 1,564                 |

## 6.5. ACCOMMODATION TYPE NEEDS

Based on the gaps identified in accommodation and the projected accommodation needs in the region, the following table provides an overview of specific accommodation typologies that may be supported in the region between 2018-2022.

This should be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

Number of establishments identified in the table relate to the larger room/site limit identified.

<sup>8</sup> PAVE Model, Urban Enterprise 2015

**TABLE 24** PROJECTED ACCOMMODATION NEEDS BY SEGMENT 2018-2027

| Type   | Description   | Need (# additional establishments to 2027) | Indicative capacity (rooms per establishment) | Total Room/Sites | Location Rural/Urban |
|--|---|--|---|------------------|----------------------|
| Boutique Guest House, B&B and Self-Contained Accommodation | The region does not have a large number of small high-quality accommodation providers with a focus on experiential accommodation. There is opportunity for smaller providers to establish in the region at key locations to provide niche accommodation in urban areas.   | 5  | 10-20 rooms                                   | 108              | Urban                |
| Quality Contemporary Budget Accommodation                  | There is a lack of quality contemporary budget accommodation in the region, both in Urban Geelong and within the region's villages. Urban Geelong should be able to support a large budget accommodation targeting younger markets and budget travellers. Some of the other villages such as Queenscliff have potential to attract international or interstate backpackers with a strong product profile for this market (water-based activities etc), however there is no quality provision of budget accommodation.                 | 9  | 50-120 rooms                                  | 173              | Urban                |
| Large Self-Contained Accommodation/ Serviced Apartments    | There is growing preference for self-contained accommodation in a number of key markets for the region. This includes the family market, visiting short stay workers (health workers), short stay students and long stay VFR market. There is opportunity to expand this form of accommodation throughout the region, including in some of the key destination and within Urban Geelong.  | 16   | 80-150 rooms                                  | 324              | Urban                |
| Boutique Hotels  | There is opportunity for investment in Boutique high quality hotels throughout the region including in Geelong and in villages such as Queenscliff. There is a lack of quality contemporary accommodation identified across the region.   | 6  | 20-40 rooms                                   | 130              | Urban                |
| 4.5-5 Star Branded Hotel                                   | A large high quality 4.5 – 5 star large branded hotel has been identified as gap in Urban Geelong. Growth in business events, business workers, weekend escapes and the international market would support a facility. It is envisaged that development of a large convention centre would be a catalyst to attracting this facility.   | 16   | 150 rooms-250 rooms                           | 324              | Urban                |
| Caravan and Camping Ground/Tourist Park                    | Rural areas are an attractive location for Camping and Caravan Parks given their natural and rural setting and requirement for large sites. There is already a large provision of this accommodation type across the region, however, Greater Geelong and The Bellarine TDS identified an opportunity for an additional quality or branded tourist park (either on the edge of urban area on in rural zones).   | 4  | 40-80 cabins                                  | 86               | Rural                |
|  |   | 6  | 60-120 sites                                  | 130              |                      |
| Integrated Resort  | An integrated tourist resort which includes quality hotel style or self-contained accommodation as well as a number of other uses such as restaurant, conference centre, recreation, and spa and wellness (either on the edge of urban area on in rural zones). The only example of this on the Bellarine would be the 13th Beach Golf Resort or the BIG 4 Beacon Resort (Queenscliff).   | 9  | 80 - 120 rooms                                | 173              | Rural                |
| Quality Farm Stay  | Given the agricultural strengths of the region, quality farmstay accommodation is a key gap. The growing food and wine tourism market in the Bellarine is well matched with this accommodation type.  | 0  | 3-5 rooms                                     | 9                | Rural                |
| Golf Course  | Golf is an emerging, high yielding market for the region and there is opportunity for other golf clubs to develop accommodation (only Thirteenth Beach Golf Club currently offers accommodation).   | 2  | 20 rooms                                      | 43               | Rural                |
| Wineries   | There are a number of large, well known wineries which already have significant tourism uses (e.g. cellar door, restaurant, events and functions). The development of ancillary accommodation would be a natural step in their growing tourism position on the Bellarine. There is also a smaller cluster of wineries in North Geelong around Anakie.   | 1  | 5-25 rooms                                    | 22               | Rural                |
| Nature-based   | Compared with other regions, Greater Geelong and The Bellarine has a greater farmed and agricultural landscape rather than high value natural landscapes. However, there are key areas which would be suited to nature-based accommodation including:<br>-Brisbane Ranges;<br>-You Yangs;<br>-Lake Connewarre;<br>-Swan Bay; and<br>-Appropriate coastal locations.<br>These areas have significant landscape and environmental value and appropriate design and siting will be required to minimise visual and environmental impact. | 2  | 10-20 rooms                                   | 43               | Rural                |
| <b>Total</b>   |   | <b>78</b>                                  |   | <b>1,564</b>     |                      |



**PART B**  
**SUB REGIONAL PROFILES**

## 7. GEELONG URBAN

### 7.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates the Geelong Urban subregion attracted a total of 3.04 million visitors in 2018, including 2.3 million day trip visitors (77%) and 713,356 overnight visitors (23%). Visitation to Geelong Urban accounts for 53% of total trips to the Greater Geelong and the Bellarine region.

The Visiting Friends and Relatives market is important to Geelong Urban, with 52% of domestic overnight visitors primarily visiting for this purpose. As the core commercial district for the region, Geelong Urban also attracts the majority of the region's daytrip Business travel market.

### 7.2. KEY FINDINGS

**Visitation to Geelong Urban accounts for 53% of total trips to the Greater Geelong and the Bellarine region.**

**As the core commercial district for the region, Geelong Urban also attracts the majority of the region's daytrip Business travel market. Business events also present a key strength of Geelong Urban with a number of venues which can host over 200 delegates at a time.**

**Arts and culture has developed into a key tourism product for Geelong Urban, including the Geelong Gallery, Geelong Performing Arts Centre (GPAC), the Newtown artists precinct and the vintage precinct in North Geelong.**

**Key product strengths of Geelong Urban are centred in the foreshore precinct, including the accommodation and hospitality (bars and restaurants) along The Esplanade, and the nature-based activities available at the foreshore parks and Western Beach.**

### 7.3. PRODUCT PROFILE

#### NATURE-BASED TOURISM

The key nature-based tourism product in Geelong is the waterfront area. The beach itself is a key product strength, used for swimming, sunbathing and sports, as is the public children's baths which attract the family market visiting with young children.

The Geelong Botanic Gardens is another natural attraction that is free to access, with additional tourism product available on-site including the Tea House café.

The waterfront is currently undergoing significant revitalisation under the '*Waterfront Geelong – Safe Harbour Precinct*' G21 Priority Project. This will include public realm and leisure area improvements, a series of retail spaces and a public viewing platform, and a number of other boating infrastructure improvements.

#### HISTORY AND HERITAGE

Geelong Urban offers a variety of high-quality history and heritage attractions, including:

- Geelong Maritime Museum;
- Geelong Heritage Centre;
- Old Geelong Gaol;
- National Wool Museum, and
- the Barwon Grange and The Heights heritage properties, both in Newtown, each managed by the National Trust of Australia.

The industrial heritage of Geelong Urban provides opportunity to create an interesting backdrop for various activities, particularly when former industrial sites are transitioned to new contemporary uses. There are currently a number of sites being considered for reuse, such as the Ford site, Osborne house, and the old Geelong Jail.

## ARTS AND CULTURE

Concentrations of arts product can be found in central Geelong, including the Geelong Gallery, Geelong Performing Arts Centre (GPAC), the Metropolis Gallery, the Boom Gallery, and the working studio gallery Art@TheWintergarden.

There has been significant development in the arts and cultural scene in Geelong Urban, with Geelong growing a reputation as a cultural centre. Geelong Gallery is under new management who have a greater entrepreneurial drive and are focused on attracting major exhibitions, as well as pushing to obtain funding for the redevelopment of the Gallery which will more than double its current footprint. The Gallery has an impressive collection and a notable range of exhibitions, including the Archibald Prize exhibition.

Further investment includes Geelong Performing Arts Centre (GPAC), which is currently undergoing a \$38.5 million redevelopment. Geelong Library and Heritage Centre (the Dome) is an award winning and highly recognised building structure that opened in late 2015. The five-storey library building includes multiple libraries, a gallery space, a restaurant/café, dedicated children's and youth floor, public lecture theatres and event spaces, with the upper level dedicated to major events.

There is an emerging artists and design professional's precinct in the suburb of Newtown, driven by the expansion of the Boom Gallery exhibition and co-working spaces, with many artists and small businesses locating at the site and in nearby buildings. (These former industrial buildings were rezoned to mixed use, enabling a mix of creative uses to take place).

There is also an emerging vintage retail precinct in North Geelong, including the Geelong Vintage Market and nearby antiques stores.

## FOOD AND BEVERAGE

There are a growing number of wineries located in the Geelong Urban subregion, predominantly in Waurm Ponds. Few wineries in Urban Geelong have accompanying tourism product such as cellar doors, dining option or function/events spaces, and none offer accommodation onsite. These are detailed in Table 25.

There are a number of new developments, including Little Creature Brewery, White Rabbit Brewery and Provenance Wines. Furthermore, there has been significant investment into wine and beer offerings, including the rejuvenation of Geelong Cellar Door on Little Malop Street.

There has also been significant investment in waterfront and high-quality dining establishments, such as Wah Wah Gee, Le Parisien. and the 2 hatted Restaurant Igni.

**TABLE 25** GEELONG URBAN, WINERIES AND BREWERIES

| Winery                        | Location    | Cellar Door/<br>Shopfront | Café /<br>Restaurant | Functions/<br>Events | Accomm. |
|-------------------------------|-------------|---------------------------|----------------------|----------------------|---------|
| Little Creatues<br>Brewery    | Geelong     |                           | ✓                    | ✓                    |         |
| White Rabbit Brewery          | Geelong     |                           | ✓                    | ✓                    |         |
| Provenance Wines              | Fyansford   | ✓                         | ✓                    | ✓                    |         |
| Mt Duneed Estate              | Waurm Ponds | ✓                         | ✓                    | ✓                    |         |
| St Regis Vineyard &<br>Winery | Waurm Ponds | ✓                         | ✓                    |                      |         |
| Waybourne Winery              | Waurm Ponds | ✓                         |                      |                      |         |
| Prince Albert<br>Vineyard     | Waurm Ponds | ✓                         |                      |                      |         |

## BUSINESS AND CONFERENCE MARKET

There has been significant investment into the Business and conference market, including the redevelopment of the Novotel for business and conference events, and the expansion of the GMHBA Stadium. The GMHBA Stadium has been expanded and now has increased seating capacity. The stadium is under new Trust management who have a directive to increase unitisation of the stadium both from an events and conference perspective.

## EVENTS AND FESTIVALS

The Cadel Evans Great Ocean Road Race, beginning in Geelong and ending in Torquay, is a key driver of visitation for the region.

There are a number of signature arts and culture events in Geelong Urban, including Geelong After Dark and Mountain to Mouth (M~M).



Source: Mountain to Mouth, Dean Walters, 2018.

## TRANSPORT

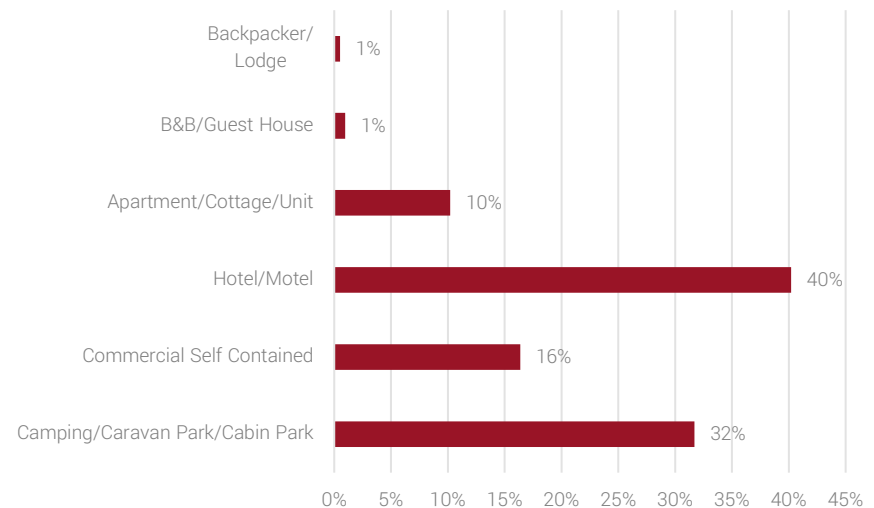
Port Phillip Ferry Services have recently announced a ferry service between Geelong and Melbourne, which will begin in 2019 and will provide alternative and luxury travel options for tourists and residents alike.

## ACCOMMODATION

Geelong holds the majority of the luxury and high-end accommodation in the region. Geelong Urban has only 4 accommodation establishments offering more than 50 rooms, a clear gap in supply for a destination competing in the conferences and exhibitions market. There is also a gap in backpacker accommodation, accounting for only 1% of total rooms in Geelong Urban.

Please note, Airbnb products are not taken into consideration in this assessment due to the sporadic nature of the products relating to seasonality.

**FIGURE 26** ROOMS BY ACCOMMODATION TYPE – GEELONG URBAN



Source: Urban Enterprise, 2018.

## 7.4. OPPORTUNITIES FOR GEELONG URBAN

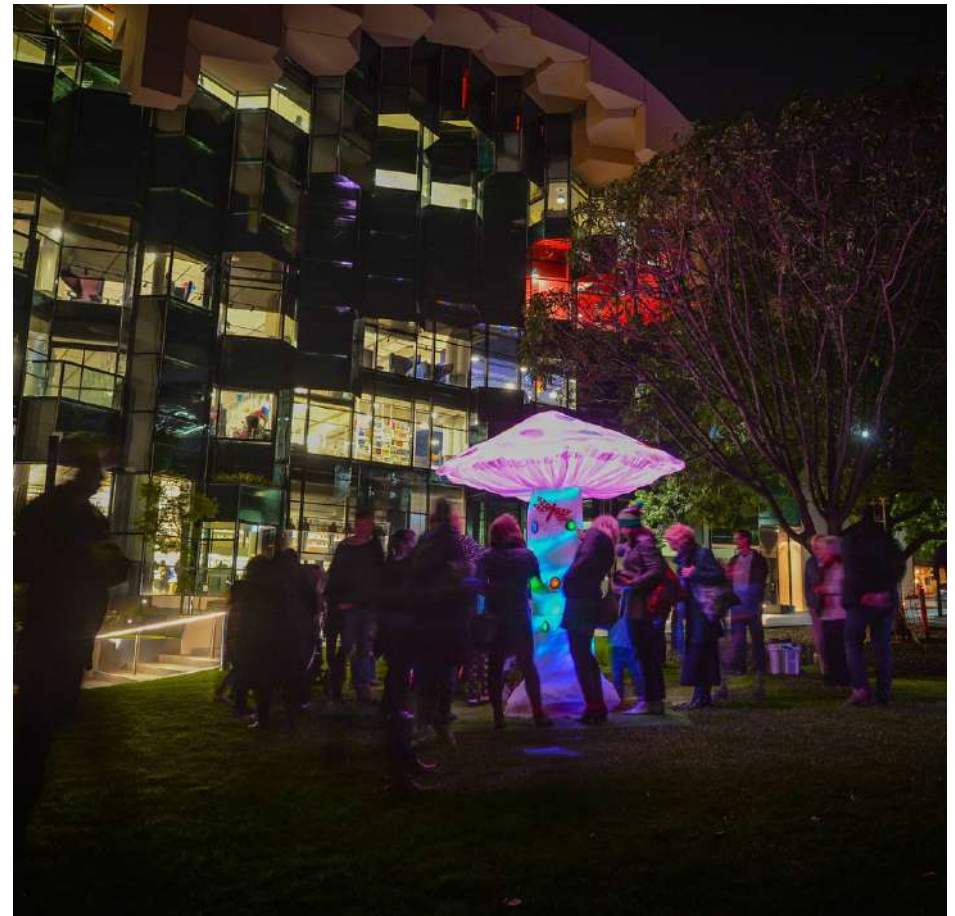
Tier 1 priority project opportunities for Geelong Urban have been identified as:

- Geelong Convention and Exhibition Centre;
- Waterfront Geelong – Safe Harbour Precinct;
- Fast rail to Geelong;
- Cruise ship infrastructure;
- Osborne Park Precinct redevelopment;
- Geelong Cultural Precinct redevelopment;
- GMHBA/Kardinia Park Redevelopment;
- Development of Eastern Beach spa complex;
- Skyrig Adventure Park;
- Geelong Port Phillip Ferry Service;
- 4-5 star large branded hotel accommodation; and
- Contemporary experiential accommodation.

Tier 2 project opportunities for Geelong Urban have been identified as:

- Gateways and signage improvements;
- Reimagine the Geelong Port Foreshore;
- Road cycling maps and app development;
- Long-stay self-contained serviced apartments; and
- Quality budget accommodation e.g. 'flashpacker' accommodation.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



Source: Geelong After Dark, 2017.

## 8. QUEENSLIFF AND POINT LONSDALE

### 8.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates the Queenscliff and Point Lonsdale subregion attracted a total of 630,158 visitors in 2018, including 222,149 daytrip visitors (77%) and 408,010 overnight visitors (65%).

The holiday home market is important in Queenscliff and Geelong, with 40% of visitors staying in holiday homes. Therefore, it will be important to market experiential products such as food, wine, events and festivals to this market, and broaden their use of their holiday homes outside of peak summer season through the development of an off-peak events calendar.

### 8.2. KEY FINDINGS

**Queenscliff and Point Lonsdale includes one of the oldest and intact historic tourism townships in Victoria, however there is a lack of new contemporary product and infrastructure to meet visitor expectations.**

**The Borough of Queenscliffe's tourism initiatives including the Fort Queenscliff Masterplan and the Lighthouse Reserves Masterplan will go some way to providing new and interesting product and accommodation to drive visitation.**

**Queenscliff is also the home of the Sorrento Queenscliff Ferry and there have been ongoing enhancements to the Ferry infrastructure and harbour precinct. A key focus for Queenscliff and Point Lonsdale will be increasing the number of ferry visitors stopping over in Queenscliff, with an aim to converting their stay to an overnight trip.**

**Further development and promotion of emerging luxury accommodation products is necessary.**

**There have been a number of improvements to the dining offer, including 360Q and Queenscliff Brewhouse, bringing more contemporary dining product into the region. There is a need to ensure consistency in service and quality.**

### 8.3. PRODUCT PROFILE

#### HISTORY AND HERITAGE

The village of Queenscliff has a charming historic destination appeal, and its heritage architecture and character is supported by a number of key heritage attractions, including:

- Fort Queenscliff Museum;
- Queenscliff Historical Museum;
- Queenscliff Maritime Museum.

The village also has an extensive number of heritage listed buildings that create an aesthetic backdrop for tourism. The former historic hotels of Queenscliff were once iconic tourism accommodation, however many of these have been repurposed into non-tourism uses such as residential apartments.

#### FOOD AND WINE

There have been a number of recent investments into the dining scene in Queenscliff and Point Lonsdale, including 360Q, Q-Train and Queenscliff Brewhouse and adjoining accommodation. Further promotion of these venues, as well as consistency in service and quality, are necessary to increase visitation to these establishments and the subregion.

360Q is a two-storey dining venue located on Queenscliff Harbour, taking in 360-degree views of Port Phillip Bay, the Bass Strait and the Mornington Peninsula.



## TRANSPORT

The Queenscliff-Sorrento Ferry provides a key link between The Bellarine Peninsula and the Mornington Peninsula and is a popular mode of transport for visitors to Victoria. However, many visitors bypass Queenscliff and Point Lonsdale

A key focus for Queenscliff and Point Lonsdale will be increasing the number of ferry visitors stopping over in Queenscliff, with an aim to converting their stay to an overnight trip.

## NATURE-BASED

Queenscliff and Point Lonsdale set on Port Phillip Bay and Bass Strait is a strong water-based destination providing for a range of water sports and boating enthusiasts. Point Lonsdale has excellent ocean beaches.

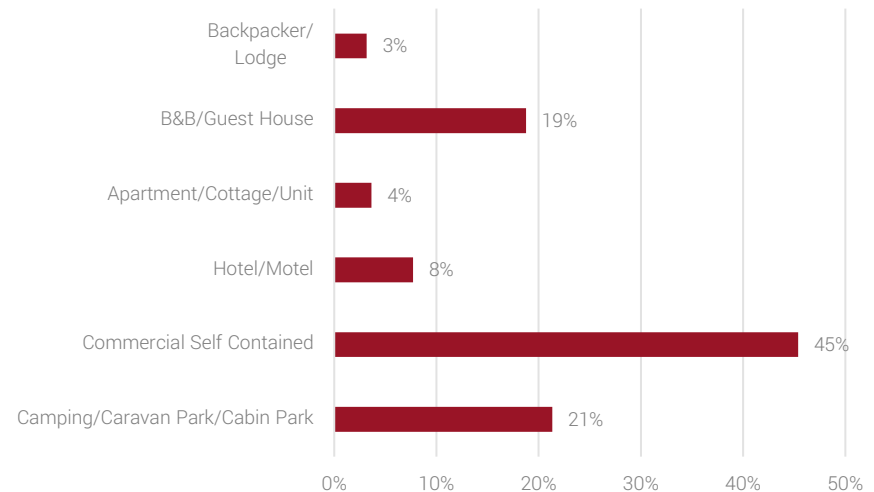
## ACCOMMODATION

The accommodation profile in Queenscliff and Point Lonsdale is dominated by commercial self-contained accommodation (45%), camping/caravan park/cabin park accommodation (21%) and B&B/Guesthouse accommodation (19%). There are also 1,487 holiday homes in the subregion.

Luxury accommodation is an emerging product area for Queenscliff and Point Lonsdale. Recent developments include Lon Retreat and Spa, a luxury accommodation offering with seven private suites and a complementary well-being offer, including access to the Mineral Pool and an Artisan Breakfast Hamper. The Nest is another example of a luxury accommodation offering, with bed and breakfast accommodation 'pods' and private spas for each pod.

Luxury accommodation in Queenscliff and Point Lonsdale needs to be further marketed and promoted. High-quality food and wine experiences need to be further developed to complement these experiences.

**FIGURE 27** ROOMS BY ACCOMMODATION TYPE – QUEENSCLIFF AND POINT LONSDALE



Source: Urban Enterprise, 2018.

## 8.4. OPPORTUNITIES FOR QUEENSLIFF AND POINT LONSDALE

Tier 1 priority project opportunities for Queenscliff and Point Lonsdale have been identified as:

- Borough of Queenscliffe investment into Tracks and Trails;
- Borough of Queenscliffe foreshore improvements;
- Hesse Street revitalisation;
- Development of Fort Queenscliff;
- Ferry terminal upgrade;
- Bellarine Railway Masterplan; and
- Events/Culture.

Tier 2 project opportunities for Queenscliff and Point Lonsdale have been identified as:

- Community hub redevelopment (Historical museum, VIC and library consolidation);
- Destination Queenscliff;
- Improvements to dining experiences in Queenscliff; and
- Point Lonsdale Lighthouse Reserve;
- Improvement to Queenscliffe Maritime Museum.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 9. BELLARINE SOUTH

### 9.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Bellarine South subregion visitation was 924,424, capturing 16% of total visitation to Greater Geelong and The Bellarine region. 62% of total visitors to the subregion were overnight visitors to the region and only 38% were on a daytrip.

### 9.2. KEY FINDINGS

**The Bellarine South includes the well-developed destinations of Barwon Heads and Ocean Grove.**

**Key product strengths are nature-based tourism products, including the ocean beaches to the south, the Barwon River and Lake Connewarre. Investment into these natural assets, including master planning and infrastructure development, are a significant tourism growth opportunity for the region.**

**Reinvestment in accommodation to provide a contemporary offer to visitors is a key opportunity, including the development of nature-based accommodation.**

### 9.3. PRODUCT PROFILE

#### NATURE-BASED

Ocean Grove and Barwon Heads are set on either side of the Barwon River, where the river mouth meets the sea. The excellent ocean beaches set on the Bass Strait are a key product strength and driver of visitation, particularly in peak season. There are a range of water sports and activities on both the river and along the coastline, and a number of boating facilities.

Lake Connewarre is a key natural asset in the region, with surrounding wetlands and parklands. The activation of Lake Connewarre provides a significant opportunity to develop further nature-based tourism attractions for the reason in off-peak season.

#### THEME PARKS

Adventure Park, located in Wallington, is Victoria's largest theme park, and includes both theme-park and water-park rides and attractions. Adventure Park receives 240,000 visitors annually, marketing only to the domestic market. Operating only six months of the year, Adventure Park operation is currently limited as a seasonal attraction.

The Park recently has recently developed further rides, with a view for future development accommodation, day spa venues, a conference centre, or other tourism product, provided a Masterplan is submitted.

#### GOLF

Barwon Heads on The Bellarine Peninsula has two golf courses which are ranked within the Golf Digest's Australia's top 100 golf courses: Barwon Heads Golf Club, ranked 25th in Australia, and the 13th Beach Golf Links, with the 'Beach' course ranked 28th in Australia. Both golf clubs provide high quality complementary accommodation in the golf course.

The ISPS Handa Vic Open is a significant event held at 13th Beach Golf Links. It is a family-friendly, professional golf event which plays host to some of the world's best golfing talent at one of Australia's premier golf facilities.

#### FOOD AND BEVERAGE

There are eight wineries and one cidery in the Bellarine South subregion, based mostly in Wallington and Marcus Hill. Seven of the establishments offer cellar door

experiences, five with dining option and function/events spaces, and four offering accommodation onsite.

Recent investment has occurred with the contemporary Flying Brick Cider Co. opening in Wallington, offering a cellar door and provedore experience, lunch 7 days a week and dinner on Friday and Saturday.

**FIGURE 28** WINERIES IN BELLARINE SOUTH

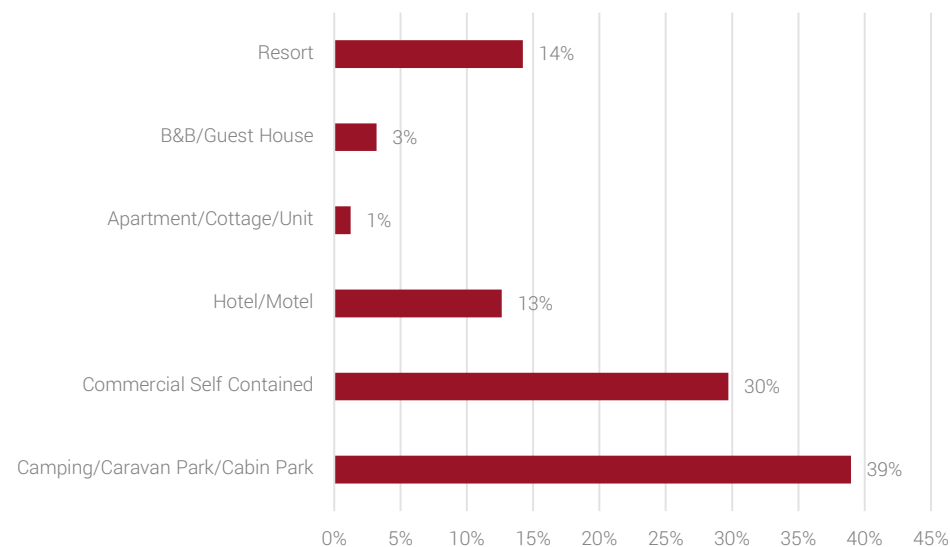
| Winery   | Location    | Cellar Door | Café / Restaurant | Functions / Events | Accomm. |
|--|-------------|-------------|-------------------|--------------------|---------|
| The Minya Vineyard & Winery                        | Connewarre  | ✓           | ✓                 | ✓                  | ✓       |
| Basils Farm  | Swan Bay    | ✓           | ✓                 | ✓                  |         |
| Flying Brick Cider Co. and Yes Said the Seal Wines | Wallington  | ✓           | ✓                 | ✓                  |         |
| McGlashans Wallington Estate                       | Wallington  | ✓           | ✓                 | ✓                  | ✓       |
| Ponda Estate Vineyard                              | Wallington  | ✓           |                   |                    |         |
| Oakdene Vineyards Restaurant                       | Wallington  | ✓           | ✓                 | ✓                  | ✓       |
| Wayawu Estate Winery B&B                           | Wallington  | ✓           |                   |                    | ✓       |
| Marcus Hill Vineyard                               | Marcus Hill |             |                   |                    |         |
| Banks Road Vineyard                                | Marcus Hill | ✓           | ✓                 | ✓                  |         |

## ACCOMMODATION

Accommodation in Bellarine South is dominated by camping/caravan park/cabin park style accommodation (39%) and commercial self-contained accommodation (30%). There are also 1,804 private holiday homes in Bellarine South.

Much of the commercial self-contained accommodation consists of large family style accommodation. Smaller scale self-contained homes and higher-end hotel/motel style accommodation should be considered for the Lifestyle Leader and Metrotech markets.

**FIGURE 29** ROOMS BY SUB-REGION – BELLARINE SOUTH



Source: Urban Enterprise, 2018

## 9.4. OPPORTUNITIES FOR BELLARINE SOUTH

Tier 1 priority project opportunities for Bellarine South have been identified as:

- Barwon River parklands project
- Lake Connewarre nature-based tourism masterplan;
- Barwon coast masterplans;
- Barwon coast trail;
- Barwon Coast group accommodation project; and
- Off-peak events program.

Tier 2 project opportunities for Bellarine South have been identified as:

- Visitor information services;
- Wayfinding signage;
- Marketing and branding of Barwon Coast;
- Nature-based accommodation (e.g. cabins) at Barwon Estuary;
- Reinvestment into existing commercial accommodation; and
- Development of accommodation at wineries.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 10. BELLARINE NORTH

### 10.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Bellarine North subregion visitation was 841,706, capturing 15% of total visitation to Greater Geelong and The Bellarine region. 67% of total visitors to the subregion were overnight visitors to the region and only 33% were on a daytrip.

The holiday home market makes up 51% of overnight visitors to the Bellarine North subregion.

### 10.2. KEY FINDINGS

**Bellarine North captures a large number of overnight visitors, with the majority of these visitors staying in holiday homes or camping.**

**Bellarine North has recently seen investment in hinterland product such as wineries and dining, including Jack Rabbit Vineyard, The Whiskery and redevelopment of Scotchman's hill winery.**

**Key opportunities for Bellarine North include investment in large scale accommodation and further experiences around boating and seafood, with investment in Portarlington Safe Harbour.**

### 10.3. PRODUCT PROFILE

#### NATURE-BASED TOURISM

The Bellarine North has a range of fishing charter and tours servicing the region. However, The Bellarine North does not have many trails or adventure activities. There is considerable potential to improve the offer at both the coastal and rural destinations and capitalise on their natural beauty, as well as improved interpretation and other visitor facilities.

#### HISTORY AND HERITAGE

The National Trust of Australia manages the Portarlington Mill, a heritage listed building now used as an exhibition and social functions venue, located 300 metres from the beach. The building is one of the few remaining and preserved Victorian flour mills, made of heavy timber posts and natural stone.

#### GOLF

The Bellarine North area contains two high quality and popular golf clubs: The Portarlington Golf Club and Curlewis Golf Club. The Curlewis Golf Club has recently undergone significant redevelopment and has reopened an \$8 million improved golf course, new mini golf, driving range and licensed hospitality venue. The Curlewis Golf Club also hosts weddings and functions and is currently in the process of developing onsite accommodation.

#### FOOD AND BEVERAGE

The Bellarine North is increasingly becoming known for its fresh local produce and aquaculture. The Portarlington Mussel Festival is a significant event that attracts a large number of visitors to Portarlington annually. Mussels, wine and bay cruise tours are run sporadically by Port Phillip Ferries in the summer time. There is opportunity to further expand this service by providing more regular tours and by introducing packages with other wineries and provedore experiences.

The Bellarine North subregion has 13 wineries providing a quality experience to visitors to the region, and with the majority (10) having cellar doors available. A growing number (7) of the wineries in Bellarine North have onsite dining, 7 have function/event capabilities, however only 2 of the wineries provide onsite accommodation.

Recent investments into the winery and distillery experience include the redevelopment of Scotchman’s Hill Winery, and the recently opened The Whiskery, a new development by Bellarine Distillery

**TABLE 26** WINERIES IN BELLARINE NORTH

| Winery                      | Location      | Cellar Door | Restaurant | Functions / Events | Accomm. |
|-----------------------------|---------------|-------------|------------|--------------------|---------|
| Bellarine Estate Restaurant | Bellarine     | ✓           | ✓          | ✓                  |         |
| Jack Rabbit Vineyard        | Bellarine     | ✓           | ✓          | ✓                  |         |
| Bennetts                    | Bellarine     | ✓           | ✓          | ✓                  |         |
| Terindah Estate             | Bellarine     | ✓           | ✓          | ✓                  | ✓       |
| Hat Rock Vineyard           | Bellarine     |             |            |                    |         |
| Leura Park Estate Vineyard  | Curlewis      | ✓           | ✓          | ✓                  |         |
| Baie Wines                  | Curlewis      |             |            | ✓                  |         |
| Barrgowan Vineyard          | Curlewis      | ✓           |            |                    |         |
| Curlewis Winery             | Curlewis      | ✓           |            |                    | ✓       |
| OneDay Estate               | Curlewis      | ✓           | ✓          | ✓                  |         |
| Mermerus                    | Drysdale      | ✓           |            |                    |         |
| Scotchmans Hill Vineyards   | Drysdale      | ✓           | ✓          | ✓                  |         |
| The Whiskery                | Drysdale      | ✓           | ✓          |                    |         |
| Grassy Point Wines          | Portarlington |             |            |                    |         |

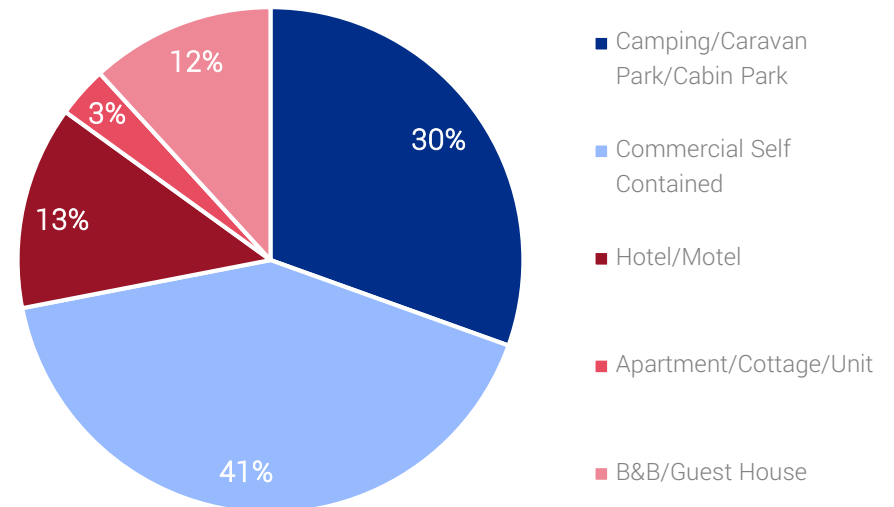
## TRANSPORT

Regular Docklands to Portarlington ferry services are run by Port Phillip Ferry service. The infrastructure built to service Port Phillip Ferry services can also be used to host cruise ship arrivals. This should be a key focus for Bellarine North.

## ACCOMMODATION

41% of commercial rooms in the Bellarine North subregion are self-contained/holiday home accommodation. Only 3% of rooms are in Hotel/Motel accommodation, with the region having a low supply of Hotel/Motel establishments (only six). Caravan/Cabin park accommodation accounts for 30% of room supply in Bellarine North, and there is a high supply of camping sites (965). There are an additional 2,633 visitors staying in private holiday homes.

**FIGURE 30** ROOMS BY ACCOMMODATION TYPE – BELLARINE NORTH



## 10.4. OPPORTUNITIES FOR BELLARINE NORTH

Tier 1 priority project opportunities for Bellarine North have been identified as:

- Portarlington Safe Harbour;
- Underwater Dive Gallery – ‘Sunken Gallery’;
- Aquaculture experiences;
- Development of large resort at Curlewis golf club;
- Development of self-contained apartment/hotel accommodation at Portarlington;
- Development of branded tourist parks; and
- Development of new experiential accommodation.

Tier 2 project opportunities for Bellarine North have been identified as:

- Cycling and walking trails network;
- Accommodation and experience product packages; and
- Development of Accommodation at wineries.

Further detail on these projects can be found in ‘*Part C – Project Profiles*’.



# 11. GOLDEN PLAINS SOUTH

## 11.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Golden Plains South subregion visitation was 121,112. Only 31% of visitors were staying overnight, with the 69% of day trip visitors.

Golden Plains South captures only 2% of total visitation to the Greater Geelong and The Bellarine region.

## 11.2. KEY FINDINGS

**Golden Plains South is largely underdeveloped in tourism, however the subregion hosts strong opportunities to grow the wine sector in the Moorabool Valley and exploring ways to further leverage off emerging tourist villages such as Meredith.**

**The continual investment in Lethbridge airport is a key opportunity for tourism development.**

## 11.3. PRODUCT PROFILE

### NATURE- BASED TOURISM

A key strength of the Golden Plains South subregion is the nature-based tourism offering, including outdoor activities that make use of the landscape and National Park spaces such as bushwalking, mountain bike riding and road cycling, and equestrian activities.

The subregion also has a gold mining history, and gold panning activities can still draw finds in some areas such as near the Steiglitz Historical Park.

### HISTORY AND HERITAGE

The Steiglitz Historic Park, nestled amongst the Brisbane Ranges National Park in the Southern Golden Plains region, is a Parks Victoria-managed 469-hectare site comprising a late 1800s goldmining township. The Steiglitz Court House has a public historical display about the township and goldmining history. Visitors are permitted to pan for gold in dedicated areas. The visitor amenities include picnic and barbecue areas, public toilet and car park, however, the tourism product at the Steiglitz Historic Park is dated and there is much potential to improve the experience offered.

### WINERIES

The key strength of the Golden Plains South subregion is the wine offer. The region has many vineyards, growing good quality, highly ranked vines of all varieties across the area known as the Moorabool Valley.

The majority of wineries have cellar door experiences available to visitors, however very few have café or restaurant facilities or the capacity to cater for functions or events. None of the wineries offer onsite accommodation. Many of the vineyards function on a part-time basis and many offer cellar door experiences by appointment only, with the industry at various stages of maturity and involvement in tourism.

Clyde Park Vineyard and Bistro has recently been expanded, with a new building built onsite adjoin to the venue facility and an outdoor theatre being currently constructed. Austin's Wines is undertaking continuous winery development and investment.

**TABLE 27** WINERIES IN GOLDEN PLAINS SOUTH

| Winery                        | Location          | Cellar Door | Café / Restaurant | Functions / Events | Accomm. |
|-------------------------------|-------------------|-------------|-------------------|--------------------|---------|
| Del Rios of Mt Anakie         | Anakie            | ✓           | ✓                 | ✓                  |         |
| Staughton Vale Vineyard       | Anake             | ✓           |                   |                    |         |
| Clyde Park Vineyard & Bistro  | Bannockburn       | ✓           | ✓                 | ✓                  |         |
| Barwon Ridge Wines            | Barrabool         | ✓           |                   |                    |         |
| Lethbridge Wines              | Lethbridge        | ✓           |                   | ✓                  |         |
| Moorabool Ridge Pty Ltd       | Lethbridge        | ✓           | ✓                 |                    |         |
| Eagles Rise Wine              | Russells Bridge   | ✓           |                   |                    |         |
| By Farr and Farr Rising Wines | Bannockburn       |             |                   |                    |         |
| Spence                        | Murgheboluc       | ✓           |                   |                    |         |
| Ceres Bridge Estate           | Stonehaven        |             |                   |                    |         |
| Austin's Wines                | Sutherlands Creek | ✓           |                   |                    |         |
| Rowsley Fault                 | Sutherlands Creek | ✓           |                   |                    |         |
| Provenance Wines              | Sutherlands Creek |             |                   |                    |         |

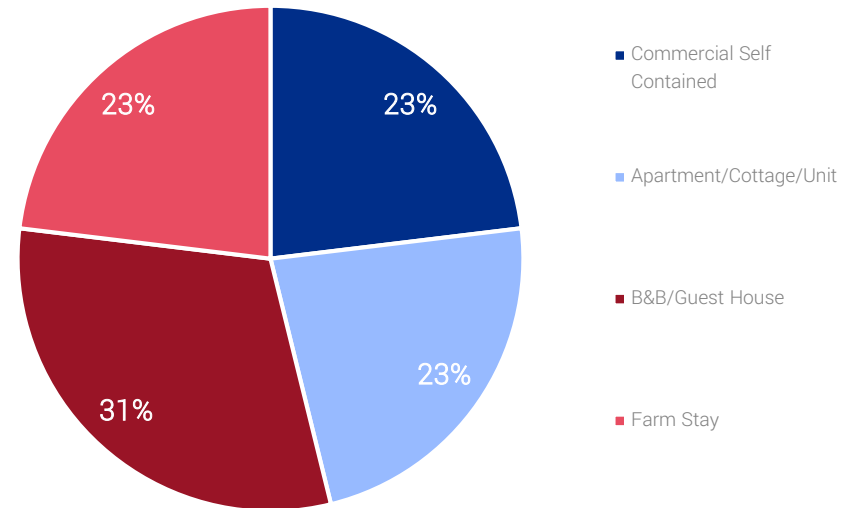
**TRANSPORT**

Lethbridge airport is a private recreational airfield in Golden Plains South. Lethbridge Airport is continually developing and expanding, with a growth in offer for general aviation and flight training facilities.

**ACCOMMODATION**

There is a clear lack of accommodation establishments located in the Southern Golden Plains sub-region. Identified accommodation gaps are listed in Figure 31 below.

**FIGURE 31** ROOMS BY ACCOMMODATION TYPE – GOLDEN PLAINS SOUTH



Source: Urban Enterprise, 2018.

#### 11.4. OPPORTUNITIES FOR GOLDEN PLAINS SOUTH

Tier 1 priority project opportunities for Golden Plains South have been identified as:

- Reticulated Sewerage Investment;
- Lethbridge Airport;
- Telecommunications infrastructure;
- Grow the Moorabool Valley Taste Trail;
- Bannockburn Civic Heart project;
- Promotion of Golden Plains to the VFR market; and

- Living Moorabool Trail.

Tier 2 project opportunities for Golden Plains South have been identified as:

- Provedore and farmgate opportunities; and
- Golden Plains Farmers market.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 12. AVALON AND THE YOU YANGS

### 12.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Avalon and the You Yangs subregion visitation was 229,519, capturing only 4% of total visitation to the Greater Geelong and The Bellarine region (note that passenger movements through the Avalon Airport are not considered in this visitor modelling). 88% of total visitors to the subregion were daytrip visitors and only 12% were on an overnight trip.

Visitation to Avalon and the You Yangs makes up only 4% of the Greater Geelong and the Bellarine region.

### 12.2. KEY FINDINGS

**Avalon and the You Yangs includes the key features of Avalon Airport and the You Yangs Regional Park. The You Yangs already hosts quality mountain biking which can be further developed through complimentary product such as food and beverage facilities.**

**Avalon Airport provides significant opportunity to grow visitation through growth in domestic and international flights and delivery of new product such as food, beverage, retail and accommodation. There is a clear lack of accommodation in Avalon and the You Yangs.**

### 12.3. PRODUCT PROFILE

#### NATURE BASED TOURISM

The You Yangs Regional Park, managed by Parks Victoria, has a variety of outdoor activities such as walking on any of the 5 trails, mountain bike riding (2 designated areas with over 50 kilometres of trails catering for all abilities), rock climbing and abseiling, scenic drives and viewpoints, birdwatching, horse riding (3 trails) and picnics.

The Brisbane Ranges National Park, also managed by Parks Victoria, has a variety of walking trails, and diverse range of native flora to study. The Staughton Vale Cliff Face Climbing Area is popular for both climbing and abseiling and provides excellent eastern-looking viewpoints for visitors. Picnic grounds and secluded walk-in camping grounds are located in the Park.

#### COMMERCIAL AIRPORT

Avalon Airport is the key commercial airports in Greater Geelong and The Bellarine region. Avalon Airport has recently developed an international terminal and attracted international carrier Air Asia, who provide twice daily flights to Kuala Lumpur.

This is a significant opportunity for tourism in Greater Geelong and The Bellarine Peninsula, and requires complementary investment, which could include commercial developments e.g. food and beverage, retail and accommodation alongside the international airport.

#### EVENTS AND FESTIVALS

Avalon Airport hosts the biennial Australian International Airshow, a key event in regional Victoria attracting a large number of visitors. The annual Lara Food and Wine

Festival is held every March in the Avalon and the You Yangs, subregion, as well as regular small-scale mountain biking events

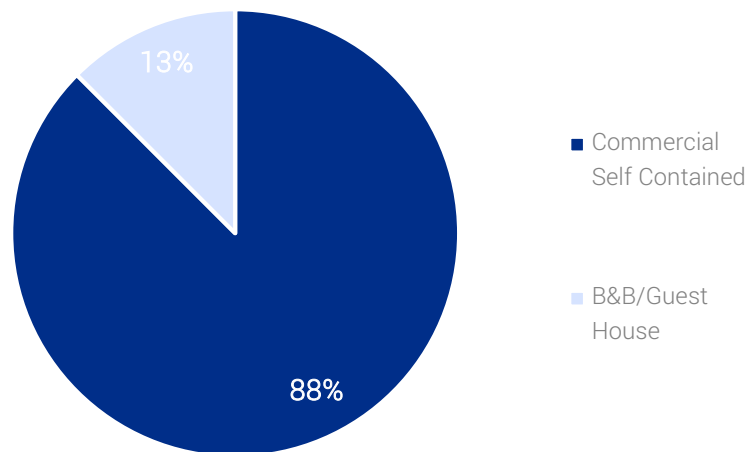
### THEME PARKS

Fairy Park, with its displays of various fairy-tale characters and settings offers a unique attraction for the area. Catering to the family market with young children, the venue includes a theme park, playground and picnic area with barbecue facilities. The venue also caters for school group visits and private functions. Food and beverage facilities and a gift shop are available on weekends and during public and school holidays.

#### 12.3.1. ACCOMMODATION

There is a clear lack of accommodation establishments located in the Avalon & the You Yangs sub-region, with only 16 commercial rooms. These are mainly commercial self-contained accommodation establishments (14), with only 2 B&B guesthouse rooms. Identified accommodation gaps are listed below in Figure 32.

**FIGURE 32** ROOMS BY ACCOMMODATION TYPE – AVALON AND THE YOU YANGS



### 12.4. OPPORTUNITIES FOR AVALON AND THE YOU YANGS

Tier 1 priority project opportunities for Avalon and the You Yangs have been identified as:

- Avalon Airport rail link;
- Implementation of Avalon Airport Masterplan; and
- Development of accommodation at Avalon Airport.

Tier 2 project opportunities for Avalon and the You Yangs have been identified as:

- Development of visitor services and amenity at You Yangs Regional Park;
- Development of hospitality product near You Yangs Regional Park;
- Development of accommodation in Anakie; and
- Development of Nature-based and group accommodation for You Yangs are.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



# PART C

## PROJECT PROFILES

# 13. PRIORITISATION OF PROJECTS

## 13.1. INTRODUCTION

This section provides an overview of the priority projects identified for the Greater Geelong and The Bellarine Region. These projects are identified as they will facilitate growth in the tourism industry.

Table 28 outlines the prioritisation criteria applied to all projects identified throughout the course of the study.

Projects are categorised as:

- Infrastructure and enabling projects;
- Experiential product development;
- Accommodation.

A preliminary economic impact analysis has been undertaken for the projects where possible. This analysis draws on previous studies and construction cost estimates using comparable projects. As this is a high-level analysis, modelling ongoing impacts has only been undertaken for accommodation projects where there is available data on the potential revenue and jobs that may be generated.

Projects have been identified as either tier 1 priority projects or tier 2 projects. Tier 1 projects are those that best align with prioritisation criteria in Table 28 and are of greater regional significance than Tier 2 projects.

**TABLE 28** PRIORITISATION CRITERIA

| Criteria                          | Description   |
|-----------------------------------|---|
| Match to Target Markets Need      | Projects that have will support target markets for Greater Geelong and The Bellarine, specifically the lifestyle leader segments: Food and wine lifestyles, inspired by nature and creative opinion leaders and traditional family life segments score well under these criteria. |
| Promotes Length of Stay and Yield | Projects that create a new product or experience or provide additional capacity for the region score well under these criteria.   |
| Strengthens the Brand Attributes  | Projects that demonstrate strong links with the brand attributes of Greater Geelong and The Bellarine will score well. These attributes include food and wine, water based/nature based and for Urban Geelong arts and culture.   |
| Economic Benefit                  | Projects that are likely to deliver a large economic boost to the regional economy will score well under this criterion. Projects that are large scale or provide a significant boost in regional capacity score well.  |
| Game Changer Projects             | Projects that create a new product and experience which is innovative and captures new visitor markets score well under these criteria.   |
| Good Value/ Cost Benefit          | This criterion assesses whether the project is likely to be good value for money. In most instances the projects have not undergone a cost benefit analysis, however there are small projects in the list that are likely to contribute greatly to the tourism experience.        |

## 13.2. INFRASTRUCTURE AND ENABLING PROJECTS

| DESCRIPTION  | SUB REGION    | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT  | PROJECT STATUS AND NEXT STEPS   |
|--|---------------|--|-----------------|---|--|---|
| <b>TIER 1 PRIORITY PROJECTS</b>  |               |  |                 |   |  |   |
| <b>GEELONG CONVENTION &amp; EXHIBITION CENTRE</b>  |               |  |                 |   |  |   |
| A Convention and Exhibition Centre, including a conference venue with the capacity for up to 1,000 people, 3,000 m2 of exhibition space, banqueting facilities, meeting rooms, a business centre and retail outlets developed alongside. | Urban Geelong | Geelong has a large business and MICE market; therefore the development of the Convention and Exhibition Centre would be a necessary development, and would complement the Melbourne Convention and Exhibition Centre. | Public/Private  | \$30m committed through Geelong City Deal.  | <p>+\$350m during construction<br/>+\$50m p/a</p> <p>600 jobs during peak construction</p> <p>270 ongoing jobs (direct and indirect)</p> | The business plan has been completed and the Convention Centre site has been identified as the Deakin University waterfront campus car park.  |
| <b>FAST RAIL TO GEELONG</b>  |               |  |                 |   |  |   |
| Feasibility study to examine fast rail infrastructure upgrades, costs and train requirements.  | Urban Geelong | There is potential to more than halve the travel time to Melbourne. This will strengthen Geelong's appeal as a place for business with strong links to Melbourne.  | Public          | \$50m State Government funding commitment to investigate a high –speed rail link between Geelong and Melbourne. |  | <p>\$50 million State Government funding commitment to investigate a high –speed rail link between Geelong and Melbourne.</p> <p>A State Government commitment of \$500 million is required to separate the Geelong-Melbourne regional line from the metropolitan rail service by creating express lanes at Wyndham Vale.</p> |



| DESCRIPTION   | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS |
|---|--------------------|---|-----------------|----------------|-----------------|-------------------------------|
| <b>IMPLEMENTATION OF AVALON AIRPORT MASTERPLAN</b>  |                    |   |                 |                |                 |                               |
| <p>A Master Plan for Avalon Airport was completed and was endorsed by the Department of Defence in September 2015. The Master Plan is effective for 20 years. The major components of the Master Plan include:</p> <ul style="list-style-type: none"> <li>• The expansion of the existing domestic terminal to accommodate international operations without a Major Development Plan (up to 10,000 square metres);</li> <li>• The provision to construct a new international terminal;</li> <li>• The establishment of airfreight terminals;</li> <li>• The provision to lengthen the existing runway to up to 4,000 square metres;</li> <li>• The development of accommodation hotels;</li> <li>• The development of the site to accommodate retail, commercial and industrial;</li> <li>• The continuation of the Australian International Airshow until at least 2025;</li> <li>• The reservation of land and provision for the establishment of a rail link;</li> <li>• The provision for recreational and sporting facilities;</li> <li>• The continued curfew free status of the aerodrome; and</li> <li>• The City of Greater Geelong will remain the Planning Authority.</li> </ul> | Avalon & You Yangs | <p>The approval of the Master Plan ensures the long term future operation of the airport and provides a strategic basis to leverage tourism opportunity development.</p> <p>Implementation of the masterplan is imperative to the growth of the airport and operations.</p> | Public/Private  |                |                 |                               |

| DESCRIPTION  | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|--|--------------------|---|-----------------|----------------|-----------------|---|
| <b>AVALON AIRPORT RAIL LINK</b>  |                    |   |                 |                |                 |   |
| The Victorian Government is planning for the development of the Avalon Airport Rail Link to support the newly opened international terminal. The rail link will connect Avalon Airport with the existing Melbourne - Geelong rail line. V/line trains would operate between Southern Cross Station and Avalon Airport and between Geelong and Avalon via the existing Melbourne – Geelong rail line. | Avalon & You Yangs | The connection of Avalon Airport to rail transport will be a significant infrastructure development that will promote increased visitation to Greater Geelong and the Bellarine, particularly for international visitors.   | Public/Private  |                |                 | <p>The Minister for Planning approved a planning scheme amendment in June 2015 to ensure a reservation of land is maintained for the rail link</p> <p>Current proposed alignment of the railway station would involve creating an “Avalon Airport” station between Little River and Lara with a terminal for passengers to check in and drop off their bags. Passengers would then transfer to a different form of transport – possibly an autonomous bus – for a four-kilometre, four-minute journey to the departure lounge at the airport.</p> |
| <b>GEELONG PORT PHILLIP FERRY SERVICE</b>  |                    |   |                 |                |                 |   |
| Support implementation of the Port Phillip Ferry Service between Geelong and Docklands.  | Urban Geelong      | Providing diversity in the transport modes to urban Geelong will enable the region to capture a greater number of visitors who may prefer to travel via boat.   | Public/Private  |                |                 | Service to begin in 2019.   |
| <b>GEELONG CRUISE SHIP INFRASTRUCTURE (CUNNINGHAM PIER)</b>  |                    |   |                 |                |                 |   |
| This project calls for investment in moorings for cruise ships at the Geelong waterfront, which would establish Geelong as a competitive cruise ship destination. Improvements and an arrival centre at Cunningham Pier are part of the proposed investment  | Urban Geelong      | Investment in moorings will allow for easy access and potential increase to the number of cruise ships in Geelong. There is also long-term potential for Geelong to be host and service a cruise ship on a permanent basis. | Public/Private  |                |                 | Business case complete  |

| DESCRIPTION   | SUB REGION    | RATIONALE   | INVESTMENT TYPE                              | ESTIMATED COST  | ECONOMIC IMPACT   | PROJECT STATUS AND NEXT STEPS  |
|---|---------------|---|--|---|---|--|
| <b>WATERFRONT GEELONG – SAFE HARBOUR PRECINCT</b>   |               |   |  |   |   |  |
| <p>Key aspects of the Concept Plan include:</p> <ul style="list-style-type: none"> <li>a new 6 m wide wave attenuator (public accessible curved floating pier) which will protect the marina from rough water coming from the north-west</li> <li>the development of a modern floating-berth marina with greatly increased mooring capacity</li> <li>a new RGYC clubhouse with improved public access (the ground floor being open to the general public)</li> <li>integration of the Victorian Sailing School and its activities with RGYC, providing increased capacity to deliver important programs for the community</li> <li>a 'Sailor's Walk' public pedestrian passageway through the existing RGYC site</li> <li>Public realm and leisure area improvements</li> <li>a series of retail spaces and a public viewing platform, and</li> </ul> <p>the possibility of an interactive Maritime Cultural and Education Centre</p> | Urban Geelong | The new facilities will provide capacity to cater for a large increase in yachts and watercraft visiting and berthing safely in Geelong. It will improve public access to the water, support major events and enhance other recreation, economic and tourism opportunities. | Public/Private                               | <p>\$7.6m State Government funding</p> <p>\$5.5m Federal Government funding secured</p> <p>\$3m COGG</p> <p>\$3m Royal Geelong Yacht Club</p> | <p>\$17.6m immediate economic benefits in Stage 1</p> <p>42 FTE jobs p/a during construction</p> <p>21 FTE jobs p/a ongoing</p> | <ul style="list-style-type: none"> <li>Currently in detailed design phase</li> <li>\$50,000, Business Case to investigate the economic development impacts, costing, planning and required infrastructure of the project and determine an implementation strategy. (The City of Greater Geelong and the former Geelong Otway Tourism contributed \$15,000 and the Royal Geelong Yacht Club also contributed \$15,000 towards the Business Case.)</li> </ul> <p>The City of Greater Geelong has committed \$3 million.</p> <p>Royal Geelong Yacht Club has committed \$3 million.</p> |
| <b>GEELONG OSBORNE PARK PRECINCT</b>  |               |   |  |   |   |  |
| Osborne Park precinct is in North Geelong and includes the historic Osborne House and the Stables, sports reserves and open spaces and the Vietnam Veterans war memorial. A planning study is underway to reimagine the use of the precinct.  | Urban Geelong | This will provide opportunities for investment in unique and contemporary tourism products in this area.  | Public/Private (dependant on land ownership) |   |   | Master planning process is currently underway. Next stage is community consultation on draft masterplan.   |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|---|-----------------|--|
| <b>BOUROUGH OF QUEENSCLIFFE INVESTMENT INTO TRACKS AND TRAILS</b>   |                                |   |                 |   |                 |  |
| Investment into walking and cycling trails, and Improvement of infrastructure and connectivity.   | Queenscliff and Point Lonsdale |   | Public          |   |                 | Potential for around 30 km of trail to be developed. The analysis and feasibility study has been put out to tender.  |
| <b>BOROUGH OF QUEENSCLIFFE FORESHORE IMPROVEMENTS</b>   |                                |   |                 |   |                 |  |
| Improve infrastructure and streetscape along the foreshore to improve visitor experiences.  | Queenscliff and Point Lonsdale |   | Public          |   |                 | The foreshore plan is currently underway, with implementation to occur after completion.   |
| <b>QUEENSCLIFF HESSE STREET REVITALISATION PROJECT</b>  |                                |   |                 |   |                 |  |
| A Revitalisation Project for Hesse Street, Queenscliff, which will include beautification of the streetscape.   | Queenscliff and Point Lonsdale | Revitalisation would have a positive impact on the local tourism industry, improving the image of the town and making it a more competitive holiday destination. It could also have the potential to encourage reinvestment in local businesses, both on Hesse Street but in surrounding areas. | Public          | \$50,000 funding allocation for development of plan       |                 | Funding has been allocated in the local government budget to develop the revitalisation plan. The next step is for council to seek funding for the implementation of the plan. |
| <b>FERRY TERMINAL UPGRADE</b>   |                                |   |                 |   |                 |  |
| The new terminal, fully-funded by the Government in partnership with Searoad Ferries, will include modern facilities, opportunities for retail such as cafes and tourism ventures, bathrooms, disabled access and improved car parking areas. | Queenscliff and Point Lonsdale | Revitalisation of the ferry terminal means passengers will board a ferry via an aerobridge, and not the vehicle ramp, delivering a much more accessible and passenger friendly service  | Public/Private  | Total Cost \$10m. Funding received via Geelong City Deal. |                 |  |
| <b>EVENTS/CULTURE</b>   |                                |   |                 |   |                 |  |
| Development of an events and culture strategy for the Queenscliff and Point Lonsdale.   | Queenscliff and Point Lonsdale | There has been limited development in events and culture in Queenscliff and Point Lonsdale, hence the creation of an Events and Culture Strategy will provide clear direction for development in these areas.   | Public          |   |                 | Application for funding to develop strategy.   |

| DESCRIPTION  | SUB REGION          | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT   | PROJECT STATUS AND NEXT STEPS  |
|--|---------------------|---|-----------------|---|---|--|
| <b>GOLDEN PLAINS RETICULATED SEWERAGE INVESTMENT</b>   |                     |   |                 |   |   |  |
| Investment in reticulated sewerage is necessary for all of Golden Plains. Currently Bannockburn is the only town in Golden Plains South with reticulated sewerage.   | Golden Plains South | Advocacy for reticulated sewerage investment is needed, as it is key to business development and tourism development.   | Public          |   |   | Continued advocacy for federal and/or state government funding.                            |
| <b>LETHBRIDGE AIRPORT</b>  |                     |   |                 |   |   |  |
| There is opportunity to expand existing operations and products at Lethbridge, including potentially to develop a flight school and accommodation for visitors and other users of the airport such as hobby pilots. Future plans for the airport include sealing taxi-ways, motel/accommodation and a terminal building. | Golden Plains South | Lethbridge airport are looking at potential for a flight school- particularly aimed at Asian market<br>Further promotion of the airport to attract more regional carriers, and tourism industry operators such as scenic flight and skydiving businesses, could further expand the tourism potential of the airport.<br><br>It will also diversify the Golden Plains Shire's predominantly agricultural economy and complement Ballarat and Avalon airports | Private         | \$5m for master plan & construction of a terminal building<br><br>\$1.5m to develop a second runway.<br><br>\$39m estimated construction cost | 250 jobs during construction<br><br>37 ongoing jobs post construction, (28 direct). | Development of farmstay accommodation at Moranghurk winery across from Lethbridge airport. |
| <b>TELECOMMUNICATIONS INFRASTRUCTURE AND ENABLING PRODUCT</b>  |                     |   |                 |   |   |  |
| Both phone and internet coverage across the Shire are patchy.  | Golden Plains South | Better coverage provides greater opportunities (and safety) at the Meredith and Golden Plains Music Festivals as well as remote wineries, farm gates and visitors   | Public          |   |   | Continued Advocacy is required.  |
| <b>BARWON RIVER PARKLANDS PROJECT</b>  |                     |   |                 |   |   |  |
| The project aims to have a chain of open parkland from the ring road in Geelong to the sea in Barwon Heads.  | Bellarine South     | The key strategic focuses of expanding a connected network of open space, tracks and trails is planning for the next wave of regional space expansion and enhancing the visitor experience. This will provide open space linking Geelong and the Bellarine  | Public          |   |   | Finalise masterplans and concepts and seek funding for implementation.                     |

| DESCRIPTION  | SUB REGION      | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST   | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|--|-----------------|--|-----------------|--|-----------------|--|
| <b>BARWON COAST PRECINCT MASTERPLANS</b>   |                 |  |                 |  |                 |  |
| The Coastal Marine Management Plan was developed to manage the 6 precincts that make up the Barwon Coast between Ocean Grove and Barwon Heads. The Plan outlines a number of key focus areas for the precinct masterplans, including planning for enhancement of walking and cycling trails, improved access to beaches, improved marketing of caravan parks and enhanced online booking system, environmental management and infrastructure upgrades. | Bellarine South | Precinct masterplans are required to manage the stretch of crown land managed and protected by Barwon Coast, as well as to enhance infrastructure in and around the tourist parks.           | Public/Private  |  |                 | Barwon Coast are currently undertaking the Master planning process.  |
| <b>BARWON COAST TRAIL</b>  |                 |  |                 |  |                 |  |
| Development of an iconic walking trail between Bremlea and Point Lonsdale along the foreshore.   | Bellarine South | There is a lack of integration between Bellarine South and Point Lonsdale/Queenscliff. A trail along the foreshore would increase visitor dispersal across the region.                       | Public          |  |                 | Feasibility Study required for trail links   |
| <b>PORTARLINGTON SAFE HARBOUR (INCL. PRECINCT DEVELOPMENT)</b>   |                 |  |                 |  |                 |  |
| Stage Two of the project will include waterside commercial infrastructure and improve road and pedestrian access to the harbour.   | Bellarine North | The upgrade of the harbour will increase tourism opportunities through leisure and recreational boating, and position Portarlington as the home of sustainable aquaculture and fine produce. | Public          | State Government funding commitment of \$7.9m is needed to complete Stage Two. |                 | Next step is construction of stage 2, which includes the development of waterside commercial infrastructure and improvements to road and pedestrian access to the harbour. |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST           | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|--------------------------|-----------------|--|
| <b>TIER 2 PROJECTS</b>  |                                |   |                 |                          |                 |  |
| <b>GATEWAYS AND SIGNAGE IMPROVEMENT</b>   |                                |   |                 |                          |                 |  |
| An improvement to the road network gateways into Geelong, including directional and destination signage, would improve the visitor experience and legibility upon entering the region.  | Urban Geelong                  | At present the entrance points to Urban Geelong lack a feeling of arriving to a destination and any local character and identity. The alignment of the Geelong brand with the gateway experience upon entering Geelong would greatly improve the perception of Urban Geelong as a place to visit. | Public          |                          |                 |  |
| <b>REIMAGINING THE PORTS FORESHORE</b>  |                                |   |                 |                          |                 |  |
| A planning study to re-imagine the foreshore of the ports precinct in Geelong could provide opportunities to improve the public space and pathway connectivity across the region.   | Urban Geelong                  | The area has the potential to evolve through repurposing and/or revitalising the foreshore public space, making use of the views and access to the water.   |                 |                          |                 | Undertake an activation plan for Geelong's waterfront exploring ways to create experiences for visitors and greater levels of activation both summer and winter. |
| <b>ROAD CYCLING MAPS AND APP DEVELOPMENT</b>  |                                |   |                 |                          |                 |  |
| The development of road cycling maps and smart phone /tablet applications for visitors would promote and provide visitor information on the existing cycling routes across the region, encouraging visitation at multiple destinations across the region. | Urban Geelong                  | This type of information for the road cycling market is currently inconsistent across various platforms, and is not promoting destination visitation.   |                 |                          |                 |  |
| <b>COMMUNITY HUB REDEVELOPMENT</b>  |                                |   |                 |                          |                 |  |
| Redevelopment of Queenscliff's historical museum, library, Visitor Information Centre on current site.  | Queenscliff and Point Lonsdale |   | Public          | \$2.5m funding received. |                 | Preliminary plan for the museum to be demolished and reconstructed as a community hub. Next step is to attract funding.  |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>BOAT RAMP REDEVELOPMENT</b>  |                                |   |                 |                |                 |   |
| Redevelopment of the Queenscliff boat ramp.   | Queenscliff and Point Lonsdale |   | Public/Private  |                |                 |   |
| <b>CYCLING AND WALKING TRAILS NETWORK</b>   |                                |   |                 |                |                 |   |
| Improvement to the cycling and walking trails network across the Bellarine North subregion, including links to Urban Geelong and other Bellarine Peninsula destinations, Improvements required include making the roads safer for on road cyclists (such as providing road shoulders) and creating new linking pathways across the network of trails. | Bellarine North                | Investment into cycling and walking trails would encourage visitor markets, such as road cyclists and coastal walkers, to visit the Bellarine North destinations. |                 |                |                 | Develop a cycle tourism masterplan for the Geelong and Bellarine Region.          |
| <b>DEVELOPMENT OF VISITOR SERVICES AND AMENITY AT YOU YANGS NATIONAL PARK</b>   |                                |   |                 |                |                 |   |
| Development and upgrading of picnic area amenities, such as tables, barbecues, toilets, and water taps  | Avalon and the You Yangs       | This would significantly improve the experience of the destination, as well as broaden the appeal of the destination to a broader visitor market.                 |                 |                |                 |   |
| <b>VISITOR INFORMATION SERVICES</b>   |                                |   |                 |                |                 |   |
| Potential to develop a visitor information centre in Barwon Heads or Ocean Grove.   | Bellarine South                |   |                 |                |                 |   |
| <b>WAYFINDING SIGNAGE</b>   |                                |   |                 |                |                 |   |
| Enhancing and increasing the number of wayfinding signs.  | Bellarine South                | It is currently difficult for visitors to navigate from the Ferry through to the Great Ocean Road. Improvement to wayfinding signage is needed.                   |                 |                |                 | Audit the current wayfinding signage and provide recommendations on improvements. |



### 13.3. EXPERIENTIAL PRODUCT DEVELOPMENT

| DESCRIPTION  | SUB REGION    | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT  | PROJECT STATUS AND NEXT STEPS   |
|--|---------------|--|-----------------|---|--|---|
| <b>TIER 1 PRIORITY PROJECTS</b>  |               |  |                 |   |  |   |
| <b>GEELONG CULTURAL PRECINCT (BOUTIQUE HOTEL)</b>  |               |  |                 |   |  |   |
| <p><b>Geelong Art Gallery</b><br/>Revitalisation and expansion of Geelong Art Gallery.</p>   | Urban Geelong | Geelong Art Gallery is restricted by a lack of adequate space, limiting display and constraining storage of the magnificent collection owned by the people of Geelong. Expanded facilities will embed large scale, popular and drawcard exhibitions, providing significant tourism and economic outcomes for the region. | Public/Private  | \$70m State Government and Federal Government funding required to redevelop Geelong Gallery.  | Expanded gallery will attract 200,000+ visitors p/a  | Business case funded, but construction still outstanding. Investment will also be required by CoGG and Geelong Gallery. |
| <p><b>Geelong Performing Arts Centre (GPAC)</b><br/>Works on the Geelong Performing Arts Centre (GPAC) commenced in 2017.</p>                      |               | Refurbishment and expansion of GPAC will increase the number and scale of performances that can be attracted to the centre, and in turn increase visitation.   |                 | \$28m funding still required for Stage 3 GPAC construction.   | Add \$30m to GRP p/a<br><br>700 Victorian jobs during construction<br><br>390 ongoing jobs p/a |   |
| <b>GBHMA/KARDINIA PARK REDEVELOPMENT (HOTEL DEVELOPMENT)</b>   |               |  |                 |   |  |   |
| Redevelopment of Kardinia Park complex, which will add an extra 6000 seats to the stadium, amongst other infrastructure and facility improvements. | Urban Geelong | The increase in number of seats would bring increased economic investment into the area, including new jobs and economic activity.   | Public          | \$102m State Government commitment for 5 <sup>th</sup> /last stage of redevelopment.<br><br>\$3.9m State Government commitment for business case investigating Stage 5 stadium redevelopment. |  | Stage 5 to be completed after 2020 World Cup.   |

| DESCRIPTION   | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|-----------------|---|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF EASTERN BEACH SPA COMPLEX</b>   |                 |   |                 |                |                 |  |
| Development of a high-quality public baths and integrated commercial mineral spa complex located on the Geelong waterfront, making use of the natural mineral spring at Eastern Beach.  | Urban Geelong   | Geelong is one of the few areas in Australia that has natural mineral water springs. There is potential to leverage economic benefit from this natural resource.  | Public          |                |                 | Continue to promote investment opportunity.  |
| <b>SKYRIG ADVENTURE PARK</b>  |                 |   |                 |                |                 |  |
| Development of an aerial ropes facility along the Geelong foreshore.  | Urban Geelong   |   | Private         |                |                 | Currently looking at freehold land for a site. Following consultation with the State Government, it was agreed to suspend any further development of the Sky Rig proposal until the business case and master plan for the proposed Convention and Exhibition Centre are finalised. |
| <b>UNDERWATER DIVE GALLERY</b>  |                 |   |                 |                |                 |  |
| Development of an underwater gallery attraction in Portarlington, expanding the region's competitiveness as a water sport and diving destination.   | Bellarine North | This project provides potential for a year-round dive experience that will attract international visitors to the region.  | Public          |                |                 | Development of gallery underway, with first statues being erected summer 2018/19.  |
| <b>AQUACULTURE EXPERIENCES</b>  |                 |   |                 |                |                 |  |
| Establish the Bellarine North subregion as a tourism region for aquaculture, by the development of an aquaculture touring route throughout the Bellarine North subregion, and investment for local retail and hospitality businesses related to the local seafood industry. | Bellarine North | Aquaculture is a key agricultural sector in the northern Bellarine and there is significant opportunity to develop a touring route/taste trail, with events such as the Portarlington Mussel Festival already attracting large numbers of visitors. | Private         |                |                 | Work with the State Government to identify policy improvements that encourage sea to plate initiatives.  |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>THE BELLARINE RAILWAY MASTERPLAN</b>   |                                |   |                 |                |                 |   |
| Complete a masterplan and feasibility study for the development of an experience where you disembark a regular train service at Drysdale and connect to heritage rail   | Queenscliff and Point Lonsdale | The Bellarine railway runs between Queenscliff and Portarlington, with 2 daily services.  |                 |                |                 | Undertake a feasibility study and Masterplan for expansion of heritage train services.  |
| <b>DEVELOPMENT OF FORT QUEENSCLIFF</b>  |                                |   |                 |                |                 |   |
| The site upgrade and commercial development of the historic Fort Queenscliff attraction to provide an iconic tourism asset for the region. The site could hold a medium-capacity conference space, dining options, accommodation, a museum about the areas' military history, and other supporting visitor services such as tours, events and educational programs. | Queenscliff and Point Lonsdale | Fort Queenscliff is a unique heritage asset that has the potential to become a new destination for Queenscliff.                 |                 |                |                 | Business case is currently underway.<br>Next step is to obtain funding.<br>Need to continue to promote investment opportunity to private sector.                |
| <b>GROW THE MOORABOOL VALLEY TASTE TRAIL</b>  |                                |   |                 |                |                 |   |
| Development of the Taste Trail through investment in restaurants, cafes, cellar doors and associated infrastructure.  | Golden Plains South            | The taste trail needs continual investment in order to compete with the more well-developed and promoted Bellarine Taste Trail. | Private         |                |                 | Austin's has put in an application to Wine Growth Fund to develop a cellar door and café. Need to continue to promote investment opportunity to private sector. |

| DESCRIPTION   | SUB REGION          | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST   | ECONOMIC IMPACT                                     | PROJECT STATUS AND NEXT STEPS  |
|---|---------------------|---|-----------------|--|---|--|
| <b>BANNOCKBURN CIVIC HEART PROJECT</b>  |                     |   |                 |  |   |  |
| <p>A visionary project that will create a vibrant community space in the centre of Bannockburn</p> <ul style="list-style-type: none"> <li>• Water play splash pad and adventure play equipment</li> <li>• Upgraded site for the Golden Plains Farmers' Market</li> <li>• BBQ facilities and shade</li> <li>• Public toilets and seating areas</li> <li>• New car park</li> <li>• Active recreation equipment</li> <li>• Garden beds and planter boxes</li> <li>• Relocation of Playgroup building and Scouts shed to a new location onsite</li> <li>• Paved plaza for functions, events and gatherings</li> <li>• Improved lighting, safety and accessibility.</li> </ul> | Golden Plains South | The project is expected to inject an additional \$6 million per annum in retail spending in the Golden Plains Shire and will facilitate the potential expansion of the Golden Plains Farmers' Market. | Public          | <p>\$4.6m total estimated cost.</p> <p>\$2.6m State Government and Federal Government funding secured for Stage 1.</p> | \$6m p/a in retail spending in Golden Plains Shire. | <p>Stage 1 funding secured, need to secure stage 2 funding to re-locate the CFA/SES to a new site and to build a village green for events and the Golden Plains Farmers Market.</p> <p>Currently developing detailed designs, and next stage is construction of stage 1.</p> |
| <b>LIVING MOORABOOL TRAIL</b>   |                     |   |                 |  |   |  |
| Development of a walking trail along the Moorabool river to potentially link with the Barwon river.   | Golden Plains South | The Moorabool River trail will provide an important connection between Golden Plains South and Urban Geelong and will promote visitor dispersal throughout the region.                                | Public          |  |   | Currently in the concept phase, however, need funding for detailed concept plan, masterplan and business case. There is potential for a connection between Meredith and Batesford.   |

| DESCRIPTION   | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------|---|-----------------|----------------|-----------------|--|
| <b>YOU YANGS/SERENDIP MASTERPLAN</b>  |                    |   |                 |                |                 |  |
| Development of a masterplan and business case for the You Yangs Regional Park, Serendip Sanctuary and Trail Connections. Each initiative has site specific and regional outcomes, however all have the same broader aim to enhance broader bushwalking offering for Victoria to grow its reputation as the adventure capital. | Avalon & You Yangs | Each initiative aims to enhance its unique profile and offer as a diverse destination for a range of markets with improved connections to local communities and key attractions/sites.  | Public          |                |                 | Development of a master plan for each initiative and a business case for each initiative.                    |
| <b>OFF-PEAK EVENTS PROGRAM FOR BELLARINE SOUTH</b>  |                    |   |                 |                |                 |  |
| Development of a series of events throughout Autumn-Spring in order to attract off-peak visitation.   | Bellarine South    | Accommodation establishments are at capacity in Barwon Heads and Ocean Grove in summer but visitation is quite low in winter, therefore several significant events should be developed to attract visitation to the region in the off peak season and to develop a winter brand.  | Public/Private  |                |                 |  |
| <b>LAKE CONNEWARRE NATURE-BASED TOURISM MASTERPLAN</b>  |                    |   |                 |                |                 |  |
| Development of a masterplan which focuses on the activation of Lake Connewarre as a key nature-based tourism experience. Development of complementary activities and experiences such as water-based activities (canoeing, kayaking etc.) and enhancement of infrastructure (e.g. picnic grounds).                            | Bellarine South    | Lake Connewarre State Game Reserve already provides for a number of activities such as picnicking, fishing and duck hunting. It is also home to the Connewarre Wetland Centre, an important eco-tourism site providing wetland education. A masterplan is required to enhance existing facilities and experiences in order to increase visitation to Lake Connewarre. | Public/Private  |                |                 | Relevant peak body to obtain funding for a concept planning study, prior to the development of a masterplan. |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|----------------|-----------------|--|
| <b>TIER 2 PRIORITY PROJECTS</b>   |                                |   |                 |                |                 |  |
| <b>IMPROVEMENTS TO DINING EXPERIENCES IN QUEENSCLIFF</b>  |                                |   |                 |                |                 |  |
| Queenscliff village would be an ideal destination for quality dining experiences on the Bellarine Peninsula, providing a modern dining experience with a scenic heritage backdrop.  | Queenscliff and Point Lonsdale | Queenscliff is not currently providing a high quality nor variety of dining experiences for its largely Melbourne-based weekender and functions markets demand.<br>This would improve the reputation of Queenscliff as a high-quality seaside holiday village appealing to the regions discerning target markets who are interested in quality food and wine experiences whilst on holiday. | Private         | N/A            |                 |  |
| <b>DESTINATION QUEENSCLIFF</b>  |                                |   |                 |                |                 |  |
| <p>Destination Queenscliff will ensure that the precinct made up of Shortland's Bluff, Fort Queenscliff and Ocean View is recognised as one of the most magnificent coastal locations in Victoria. The key elements of the project include:</p> <ul style="list-style-type: none"> <li>• Construction of a new kiosk/café and public toilets;</li> <li>• Including 6 new cabins;</li> <li>• Cultural landscaping and paths in the Queenscliff Lighthouse Reserve;</li> <li>• Ship viewing platforms;</li> <li>• Upgrades to the car park and the southern end of Hesse Street;</li> <li>• Improvement of public open space areas; and</li> <li>• Lighting of the historic Fort Queenscliff wall.</li> </ul> | Queenscliff and Point Lonsdale | A key aspect of increasing visitation and visitor expenditure in the region is through the enhancement and protection of the significant military, maritime, indigenous and settlement heritage and the stunning beauty of the coastal vista, and rehabilitating vegetation in the area to create a focal point for residents and visitors alike.   | Public          |                |                 | <p>Funding has been received for landscaping and trail improvements at the Queenscliff Lighthouse Reserve.</p> <p>Funding required for further projects.</p> |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>IMPROVEMENT TO THE QUEENSCLIFF MARITIME MUSEUM</b>   |                                |   |                 |                |                 |   |
| Improvements to the experience could include interactive displays and technology-guided interpretive tours. An improvement to the attractions offering would also complement proposed destination development at the Fort Queenscliff site. | Queenscliff and Point Lonsdale | The Queenscliff Maritime Museum has the potential to be a leading tourism attraction for the region, particularly with strong visitor market using the Queenscliff – Sorrento ferry from the nearby ferry terminal. |                 |                |                 | Plans underway for Queenscliff Music Festival to co-home with Museum.<br>Undertake a business plan for the museum to determine how it can be improved from a governance and physical perspective. |
| <b>POINT LONSDALE LIGHTHOUSE RESERVE</b>  |                                |   |                 |                |                 |   |
| Landscape development of Point Lonsdale Lighthouse Reserve was the preferred revitalisation option from community, as opposed to any commercial development.  | Queenscliff and Point Lonsdale | The Point Lonsdale Lighthouse precinct is recognised by Heritage Victoria as being of architectural, historical and archaeological significance to the State of Victoria.   | Public          |                |                 | Landscape design to be completed early, with landscaping works to be completed by August.   |
| <b>PROVIDORE AND FARM GATE OPPORTUNITIES</b>  |                                |   |                 |                |                 |   |
| There exists the opportunity to develop Farm gate and Provideore retail and hospitality experiences.  | Golden Plains South            | There is a great supply of fresh local produce being grown in the Golden Plains South region (and nearby regions), and this needs to be showcased.  | Private         |                |                 | Work with producers to identify investment potential in farm gate activity.   |
| <b>GOLDEN PLAINS FARMERS MARKET</b>   |                                |   |                 |                |                 |   |
| Continue to grow the Golden Plains Farmers Market as a key tourism attraction and support/incubator for smaller farm gate and fresh produce makers and growers.   | Golden Plains South            |   |                 |                |                 | Develop a business plan for the sustained growth of the Golden Plains Farmers Market.   |
| <b>PROMOTION OF GOLDEN PLAINS TO THE VFR MARKET</b>   |                                |   |                 |                |                 |   |
| Encouraging local residents to become brand ambassadors.  | Golden Plains South            | It is imperative to golden plains to residents, as the VFR market is the biggest visitor market.  | Public          |                |                 |   |

| DESCRIPTION  | SUB REGION             | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|--|------------------------|--|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF HOSPITALITY PRODUCT NEAR YOU YANGS REGIONAL PARK</b>   |                        |  |                 |                |                 |  |
| The development of hospitality product such as cafes, Provedore and unique restaurant ventures would improve the destination image and experience of the You Yangs Regional Park.            | Avalon & the You Yangs | The You Yangs receives many mtn bike visitors, however there is very little local expenditure generated from these visitors.   |                 |                |                 | Work with local industry and Parks Victoria to establish an onsite food experience at the You Yangs. |
| <b>ACCOMMODATION AND EXPERIENCE PRODUCT PACKAGES</b>   |                        |  |                 |                |                 |  |
| Development of tourism packages that provide all-inclusive deals such as an accommodation and lunch/dinner at a winery (e.g. Jack Rabbit) package  | Bellarine North        | There is opportunity to strengthen Bellarine North as a destination both combining accommodation with experiences to grow the destination as a short break market.                       |                 |                |                 | Work with industry and identify businesses which would provide experiences to a package offer.       |
| <b>MARKETING AND BRANDING OF BARWON COAST</b>  |                        |  |                 |                |                 |  |
| Development and promotion of Bellarine South as a destination, with a key focus on the promotion of Barwon Heads and Ocean Grove and the significant tourism offerings of each coastal town. | Bellarine South        | Barwon Coast does not have the same brand recognition as Surf Coast, yet the offer is very similar. There is a need to explore the way in which the Barwon Coast is marketed and branded |                 |                |                 | Undertake a marketing plan and brand development exercise for Barwon Coast.                          |



## 13.4. ACCOMMODATION

| DESCRIPTION  | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS   |
|--|--------------------|---|-----------------|----------------|-----------------|--|
| <b>TIER 1 PRIORITY PROJECTS</b>  |                    |   |                 |                |                 |  |
| <b>DEVELOPMENT OF ACCOMMODATION AT AVALON AIRPORT</b>  |                    |   |                 |                |                 |  |
| There is opportunity for development of a 4-star branded hotel at Avalon Airport with an approximate capacity of 120 rooms. This development is prospective for the next 5 years and would be dependent on other commercial/retail developments in the area.   | Avalon & You Yangs | There are currently 1.1 M passengers annually with Air Asia flights running twice daily, however need 1.6 M annual visitors to support a hotel. | Public/Private  |                |                 | Continue to promote investment opportunity.  |
| <b>LARGE RESORT – AT CURLEWIS</b>  |                    |   |                 |                |                 |  |
| The development of a large resort with coastal views in proximity to Portarlington. This facility would be largely self-contained with a high level of facility provision including recreation facilities, food and beverage and also events facilities.   | Bellarine North    |   | Private         |                |                 |  |
| <b>DEVELOPMENT OF SELF-CONTAINED APARTMENT /HOTEL ACCOMMODATION AT PORTARLINGTON</b>   |                    |   |                 |                |                 |  |
| Development of self-contained and/or hotel accommodation to address the low supply of high-quality accommodation in the Bellarine North subregion.<br>Proposed development of a 68 room hotel, with 2 pools, spa, restaurant, 19 self-contained villas, function room, 20 private treatment rooms and geo-thermal access | Bellarine North    | Potential for new developments at the existing coastal reserves and coastal tourist parks. Improve the utilisation of waterfront spaces         | Private         |                |                 |  |
| <b>DEVELOPMENT OF BRANDED TOURIST PARKS</b>  |                    |   |                 |                |                 |  |
| Development of a branded tourist park in Bellarine North, of suitable scale and sensitivity to the local amenity.  | Bellarine North    |   | Private         |                |                 | Potential for development at Portarlington foreshore reserve. There are significant opportunities for fixed accommodation. |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS  |
|--|-----------------|---|-----------------|----------------|-----------------|---|
| <b>OCEAN GROVE CHALET</b>  |                 |   |                 |                |                 |   |
| 20 luxury suites to be developed as part of a high end accommodation project in Ocean Grove.   | Bellarine South | Meet demand for higher end visitors to the region   | Private         |                |                 |   |
| <b>NATURE-BASED RESORT</b>   |                 |   |                 |                |                 |   |
| Development of a nature-based resort (Loch Bellarine Resort) fronting onto a small lake in Wallington.<br>Loch Bellarine will feature a vast array of facilities to create a holistic resort experience and cater for a number of functions. | Bellarine South | There is significant opportunity to capitalise on the natural assets and rural landscape of the Bellarine Peninsula in the form of resort style accommodation.  | Private         |                |                 | Loch Bellarine Resort Feasibility Study and Concept Plans completed.  |
| <b>BARWON COAST GROUP ACCOMMODATION PROJECT</b>  |                 |   |                 |                |                 |   |
| Development of group accommodation to cater for eco-tourism and educational groups who want to experience the southern Bellarine region and its natural assets.  | Bellarine South | There is currently no large group style accommodation in the Bellarine South region and there are a number of eco-tourism groups visiting the region, therefore it is a necessary to diversify the accommodation stock. | Private         |                |                 | Develop a feasibility study and seek external funding support for the project.                              |
| <b>CONTEMPORARY EXPERIENTIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |   |
| Development of a unique and contemporary style of experiential accommodation in Geelong, for example, an art series hotel or a unique accommodation development in a repurposed building.  | Urban Geelong   | Modern, high-quality experiential accommodation is necessary to support the emerging arts and cultural scene in Urban Geelong.  | Private         |                |                 | Identify potential sites that may be explored for re-use.   |
| <b>4-5 STAR LARGE BRANDED HOTEL ACCOMMODATION</b>  |                 |   |                 |                |                 |   |
| Development of a branded four to five-star hotel in Urban Geelong, to complement a convention and exhibition centre and to address the regions need for greater supply of high-quality accommodation.  | Urban Geelong   |   | Private         |                |                 | Potential for accommodation at Geelong Exhibition and Convention Centre.<br>Potential expansion at Novotel. |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS   |
|--|-----------------|---|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF NEW EXPERIENTIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |  |
| Development of experiential accommodation such as glamping in Bellarine North along the foreshore or in areas with coastal views.  | Bellarine North | There are emerging visitor markets (Lifestyle Leaders, and high-flyers who are visiting for weddings and golf) that want to experience the natural assets of the coast in a modern luxurious accommodation setting. | Private         |                |                 |  |
| <b>WELLNESS CENTRE WITH ACCOMMODATION</b>  |                 |   |                 |                |                 |  |
| There is opportunity to develop a spa and wellness centre in Bellarine North.  | Bellarine North | Development will leverage from the emerging wellness product on the Bellarine Peninsula, in line with the range of fresh produce, farmgate developments and natural assets.   | Private         |                |                 |  |
| <b>TIER 2 PRIORITY PROJECTS</b>  |                 |   |                 |                |                 |  |
| <b>LONG STAY SELF-CONTAINED SERVICED APARTMENTS (APPROX. 150 ROOMS)</b>  |                 |   |                 |                |                 |  |
| There is a demand for long stay self-contained serviced apartments in Geelong which would serve the use of the hospital/business/public sector/education markets, as well as increase room capacity in Urban Geelong to support a growing events industry. | Urban Geelong   | The development of serviced apartments with approximately 150 room capacity would address this gap in accommodation product.  |                 |                |                 | Has come online: Deakin University student accommodation complex |
| <b>QUALITY BUDGET ACCOMMODATION, E.G. "FLASHPACKER" ACCOMMODATION</b>  |                 |   |                 |                |                 |  |
| Opportunity to invest in quality budget accommodation in this subregion, potentially a "flashpacker" accommodation establishment offering a quality budget accommodation experience, to fill the backpacker accommodation product gap.                     | Urban Geelong   | As there is a general lack of backpacker type accommodation across the region, therefore an establishment in Geelong would service travel of the budget/backpacker market to the entire region.                     |                 |                |                 | Some movement but still opportunities                            |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS                      |
|--|-----------------|---|-----------------|----------------|-----------------|---|
| <b>NATURE BASED ACCOMMODATION (E.G. CABINS) AT BARWON ESTUARY</b>  |                 |   |                 |                |                 |   |
| There are a number of nature-based assets throughout Bellarine South that can provide a potential setting for nature-based accommodation. This includes locations along the Barwon River, Barwon Estuary or overlooking the coast.   | Bellarine South |   |                 |                |                 |   |
| <b>REINVESTMENT INTO EXISTING COMMERCIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |   |
| There are a number of caravan parks and commercial establishments located throughout Barwon Heads and Ocean Grove. Many of these are in excellent locations, however many of the establishments are in need of reinvestment. Additional self-contained cabin development and improved facilities within caravan parks will meet market need. | Bellarine South |   |                 |                |                 | Underway                                |
| <b>DEVELOPMENT OF ACCOMMODATION AT WINERIES</b>  |                 |   |                 |                |                 |   |
| The Bellarine South subregion (and Bellarine Peninsula in general) has the potential to increase its wineries product offering by providing onsite accommodation, which would meet the demand of its high-income earning target markets interested in quality food and wine experiences and luxury (4 or 5 star) accommodation.              | Bellarine South | Development of experiential accommodation product linked to the wineries in the Bellarine South subregion would make the winery stays and functions market more competitive and encourage visitors to extend their stay on the Bellarine Peninsula. |                 |                |                 | Have been ecopod and glamping proposals |
| <b>DEVELOPMENT OF ACCOMMODATION AT WINERIES</b>  |                 |   |                 |                |                 |   |
| The Bellarine North subregion has the potential to increase its wineries product offering by offering onsite accommodation, which would meet the demand of its high-income earning target markets interested in quality food and wine experiences and luxury (4 or 5 star) accommodation.  | Bellarine North | Development of experiential accommodation product linked to the wineries in the Bellarine North subregion would make the winery and functions market more competitive and encourage visitors to extend their stay on the Bellarine Peninsula.       |                 |                |                 | Have been ecopod and glamping proposals |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS |
|---|--------------------------------|---|-----------------|----------------|-----------------|--------------------|
| <b>DEVELOPMENT OF ACCOMMODATION IN ANAKIE</b>   |                                |   |                 |                |                 |                    |
| There exists an opportunity to develop small-scale accommodation in Anakie, either in the form of farm stay, bed and breakfast, cabins, or onsite winery accommodation.   | Avalon & the You Yangs         | This would particularly meet the demand of visitors to the Brisbane Ranges National Park and the You Yangs Regional Park, encourage longer stays in the region and experiences of more local tourism products on offer. |                 |                |                 |                    |
| <b>DEVELOPMENT OF NATURE-BASED AND GROUP ACCOMMODATION FOR YOU YANGS AREA</b>   |                                |   |                 |                |                 |                    |
| Development of self-contained group accommodation in proximity to the You Yangs Regional Park would cater to users of the Park such as mountain bike riding and hiking groups, providing an alternative to camping. | Avalon & the You Yangs         | The development could encourage longer stays in the area and potentially lead to further local business opportunities.  |                 |                |                 |                    |
| <b>DIVERSIFICATION AND INVESTMENT INTO PRIVATE AND COUNCIL MANAGED ACCOMMODATION</b>  |                                |   |                 |                |                 |                    |
| Development of a range of accommodation types, and promotion of investment in viable accommodation types to the private sector.   | Queenscliff and Point Lonsdale | Queenscliff has a large proportion of holiday homes and historic hotels however needs a greater diversity in accommodation stock.   |                 |                |                 |                    |

# APPENDICES

## APPENDIX A PAVE MODELLING

The number of visitors to Indigo Shire has been calculated using Urban Enterprise's PAVE model. The model uses a number of algorithms which draw on local level accommodation data (number of establishments and guest rooms), ABS Survey of Tourist Accommodation data (occupancy rates) and National Visitor Survey Data (visitor proportions).

PAVE modelling has been used for the preparation of visitation figures for this report to present a more holistic representation of visitation to the Shire. Relying on Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) data in isolation does not provide an accurate account of total visitation to Indigo Shire for the following reasons:

- IVS and NVS data does not capture visitation for persons 14 years and under;
- Sampling methods for the NVS do not effectively capture holiday home visitors, due to the biased nature of holiday home ownership. This results in underestimating the number of visitors staying in holiday homes and for Indigo Shire, which has many non-permanent rate payers, underestimates total overnight visitation to the Shire;
- The IVS does not provide estimates of international day-trippers to Indigo Shire.

In response to the underestimation of visitation to Indigo Shire, Urban Enterprise provides new estimates on visitation to Indigo Shire, accounting wholly for the holiday home sector, visitors aged under 14 and international visitation.

In addition, NVS/IVS data is not accurate below the LGA level for Indigo Shire due to the low sample size. Urban Enterprises PAVE model has been developed to provide visitor estimates for small areas.

Urban Enterprise has applied this model to a number of areas in the past including Greater Shepparton, Strathbogie Shire, Murrindindi Shire, Mansfield Shire, Mitchell Shire, Surf Coast Shire, Mornington Peninsula Shire and City of Frankston. This work has been used for understanding visitation at the small area level for those areas and also for economic impact modelling.

## APPENDIX B ECONOMIC TERMS AND DEFINITIONS

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Employment data represents the number of people employed by businesses / organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy.

Impacts used in this assessment include the following terms:

- Direct effects – Direct output or value of development or construction activity.
- Indirect effects:
  - Supply-Chain effects – The increased output generated by servicing industry sectors in response to the direct change in output and demand; and
  - Consumption effects – As output increases, so too does employment and wages and salaries paid to local employees. Part of this additional income to households is used for consumption in the local economy which leads to further increases in demand and output region.



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