

2021-22 SUMMER SNAPSHOT RESULTS

SUMMARY

In February we surveyed you, our members, to understand the current climate for our industry along with future challenges and opportunities - with 105 of you taking part.

The survey showed that you overwhelmingly felt supported by us during the pandemic, and that there were mixed experiences when it came to consumer habits and trade over summer.

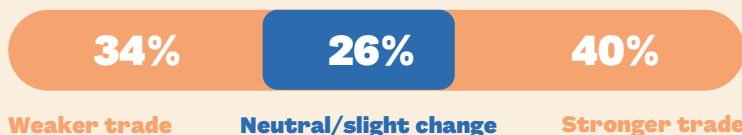
You indicated challenges into the future will likely stem from ongoing staff shortages; implications of any further lockdowns; and the slow return of international travellers and group bookings.

Understandably there was apprehension from you all for what's ahead, with only some slight confidence for the next quarter. Opportunities identified included more advanced training options; continuing to advocate for improved public transport in the region; and government support for the industry and various marketing initiatives.

Our 3 most useful services for your business

1. COVID Updates - 69%
2. TWIT - 50%
3. Regional Marketing and Promo Opportunities - 46%

Business trade in comparison to summer 2019



91%

**felt supported
by us through
the pandemic**

WHAT YOU SAID ABOUT OUR SUPPORT:

"Outstanding support."

"I always feel I can pick up the phone to you all."

"When we needed clarification on some points you were very quick at responding and checking with the relevant bodies."

"Like just about everyone else, I'd say we were all clambering for information and if I was being picky, I'd say yours came out slightly later than would have been ideal. Having said that, the premium was on accuracy, not a rush like some others."

How you ordered our strategic priorities by importance (to you)

1 - Marketing

2 - Collaboration

3 - Industry Capability

4 - Sustainable Destination Development

WHAT YOU SAID ON OUR PRIORITIES:

"Because In the short term brand is powerful and driving visitation."

"Brand Geelong is really important to drive demand into the area, which can then be enhanced and protected with sustainability."

"I believe we really just need to get the people here first. Without a strong, recognisable brand we will be overlooked for more popular regions."

"When our region prospers, so do we."

Your confidence for Easter trade and the next quarter

19%

41%

40%

Extreme to modest concern

Mostly neutral

Extreme to modest confidence

69%

had no change to 2019 consumer demographic

WHAT YOU SAID ON CONSUMER HABITS:

"Spending more, but less customers."

"People are more organised with bookings. Much easier in 2022."

"Consumers haven't really changed their interests and habits but we have impacted on their level of patronage by not extending our summer trading hours for the first time since we opened...due to the inability to staff the extra hours."

"Lead times for bookings are shorter and are more sensitive to changes."

"More interest in intimate cellar door experiences, average purchases of wine have increased and greater interest by locals exploring the areas around Geelong."

86%

preferred communications via email

"Not really... The only noticeable change is that visitors are short tempered, unfriendly and have little patience."

CHALLENGES FOR 2022

"Exposure. First cutting through the Covid fears. Then getting the message across that we're different - and well worth the effort to visit and experience."

"Keeping talented team members."

"Customers aren't willing to pay extra, but the staff shortage has seen our costs go up immeasurably."

"Domestic visitors departing O/S whilst International numbers slowly coming but not compensating for domestic losses."

"COVID, staffing, the legacy of people encouraged by the government to stay at home and work from home..."

"The only challenge is not really a challenge but an issue with scheduling. All the events in Geelong always seem to be scheduled on the same weekend..."

"Planning red tape."

OPPORTUNITIES FOR 2022

"Facilitating greater collaboration between the region's businesses."

"Continuing to build awareness of Geelong and the Bellarine as an exciting destination with emphasis on all that there is to offer. Our proximity to Melbourne, the new ferry terminal, expansion of air service into Avalon is a great opportunity..."

"Working with the wine industry here to influence broader thinking and grow this region into more of a wine tourism destination for the national market."

"Leverage the Bellarine being the 25th most loved destination. To help protect what makes it special while welcoming visitors to our special part of the world."

"Lobbying for enhanced infrastructure to support the employment of seasonal workers in seasonally extra busy destinations."

"More advanced training for industry professionals, most often training revolves around new participants."