

CORPORATE PLAN

2021-25

ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Geelong and The Bellarine is Wadawurrung country.

We welcome visitors to our region, a place we acknowledge has been cared for by the Wadawurrung people of the Kulin Nation for thousands of years.

The environment is a key reason visitors choose this destination. Traditional Owners sharing the beauty and joy of these lands and waterways is a privilege, one we repay with respect for their country, Elders and people.

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THE FUTURE LOOKS BRIGHT

WE'VE MADE SIGNIFICANT STRIDES TOWARDS OUR GOALS – BUT WE'RE NOT DONE YET.

IF THE LAST THREE YEARS HAVE TAUGHT US ANYTHING, IT'S THIS: WE ARE RESILIENT, WE ARE INNOVATIVE, AND WE ARE ADAPTABLE.

We are in awe of how the industry has tackled the challenges of the pandemic, and we are confident that with renewed focus and a solid plan, visitation to our region will not only recover ... it will thrive.

Already we have seen local visitor economy spend surpass its pre-COVID figure (from \$1.1bn to \$1.3bn) a full year earlier than predicted.

Visitation is up 47% (to \$5.2 million), and nights have also increased 41% (to 4.2 million) which is a positive step forward. However, with visitor demand returning stronger and faster our industry must now rise to face the challenges of a limited workforce and sustainable servicing.

How will we combat this, we hear you ask? By being deliberate in all that we do. This Strategic Plan will act as our guide as we navigate the challenges ahead. Clear and comprehensive, it outlines our goals, initiatives, and priorities to drive growth in visitor yield and the value of our visitor economy.

Our commitment to the development and growth of our industry remains steadfast.

You'll find the objectives set within the pages of this Strategic Plan will position us to provide the support and leadership required to future-proof our local tourism industry, making it more robust than ever before.

At the heart of our plans will always be our people. Our industry has been dealt a blow the last few years, and to truly flourish we must continue to take care of the people that make this industry great. Luckily, our spirit of collaboration is renowned, and our strategy outlines exactly how we plan on working with our members, industry stakeholders and partners to deliver benefits to our region.

It's true that the road ahead is long, but we don't plan on walking it alone.

Our vision is to position Geelong and The Bellarine as a world-class destination that leaves an impression on all those who visit, inspiring them to return again and again. Thank you for the trust you've placed in our team to achieve this.



TRACY CARTER
Executive Director



BILL MITHEN
Chairperson

2025

OUR VISION, MISSION AND PURPOSE

WHO WE ARE

Tourism Greater Geelong & The Bellarine is the regional tourism organisation spanning from Werribee to Armstrong Creek including Geelong, The Bellarine, Queenscliff and the Moorabool Valley.

PURPOSE

To build a resilient, sustainable & valued visitor economy that celebrates the character and identity of the region.

VISION

For Geelong and The Bellarine to be a world-class inclusive destination that inspires visitors to create memories and depart with a desire to return.

MISSION

To provide exceptional service to our visitors, members, industry and community so they have the knowledge, tools and capability to rebuild and enjoy a resilient visitor economy.

IN 2025 GEELONG AND THE BELLARINE IS A WORLD-CLASS, INCLUSIVE DESTINATION THAT INSPIRES VISITORS TO CREATE MEMORIES AND DEPART WITH A DESIRE TO RETURN.

There is harmony between destination development, visitor attraction and community values.

We service a resilient \$1.2B visitor economy that provides exceptional benefit to our visitors, industry, community and destination.

HOW WE DEFINE SUCCESS:

GREATER GEELONG AND THE BELLARINE HAS A \$1.2B VISITOR ECONOMY

A HEALTHY BALANCE OF VISITOR PROFILES IS MAINTAINED

MID-WEEK AND SEASONALITY IS A STRENGTH

VISITORS

LOVE AND APPRECIATE WHAT OUR REGION HAS TO OFFER.

MEASURE:

We will track visitor sentiment and the strength of positive word-of-mouth.

TARGET:

Tourism Sentiment Index rating: >55

COMMUNITY

VALUE THE IMPORTANCE OF TOURISM DEVELOPMENT IN PROVIDING GREATER QUALITY OF LIFE.

MEASURE:

We will track our performance against the annual Local Government Satisfaction survey to ensure we continue to outperform the rest of the State.

TARGET:

> State average for Performance and Importance

INDUSTRY

THE PEOPLE IN OUR INDUSTRY ENJOY PROSPERITY AND GROWTH OPPORTUNITIES.

MEASURE:

We will track the recovery of the local visitor economy to ensure we are on target to meet 2025 targets.

TARGET:

- Expenditure \$1.2b
- Nights >5.7m
- Visitors >6.4m

DESTINATION

HAS A FUTURE THAT GENERATIONS WILL BE ABLE TO ENJOY.

MEASURE:

We will develop and implement a 10 year Destination Masterplan for Greater Geelong and The Bellarine that ensures a sustainable path forward.

TARGET:

2022-2032 Destination Masterplan

OUR STRATEGIC PRIORITIES

1. DESTINATION MARKETING

Strengthen the brand and people’s connection to the region to inspire a greater journey.

2. SUSTAINABLE DEVELOPMENT

Plan for growth that delivers equitable economic, social and environmental benefit for future generations to enjoy.

3. STRATEGIC ENGAGEMENT

Working together with good governance to deliver exceptional value and benefit to our members, visitors, community and destination.

4. INDUSTRY CAPABILITY

Strengthen the capability of our region to flourish through a ‘new normal’ and support our people through recovery.

OUR VALUES

WE LIVE AND BREATHE

TEAMWORK

Everyone contributes individual strengths and effort to achieve shared goals

CREATIVITY

A dynamic environment that embraces innovation and encourages bravery

LEADERSHIP

Having the passion, knowledge and conviction to set a clear path forward with positivity and energy

ZEST

Approaching our work and our future with infectious optimism, eager energy and unbridled enjoyment

JUDGEMENT

Challenging ourselves to consider all resources so we’re responsible for good decisions



VISITORS

2021
4.1M

2019
6.4M

▼ **36%**



NIGHTS

2021
3.7M

2019
5.7M

▼ **34%**



EXPENDITURE

2021
\$763M

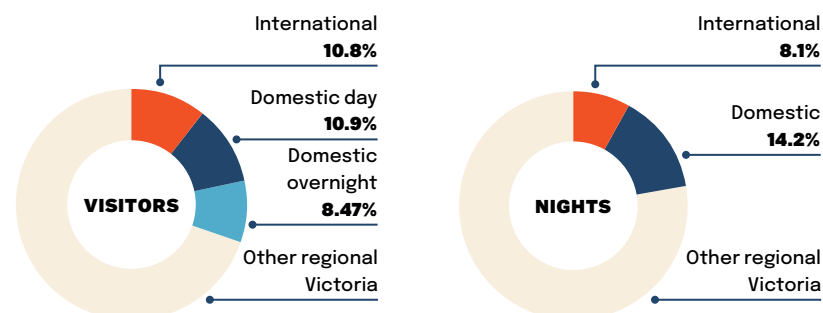
2019
\$1.1B

▼ **31%**

DOMESTIC OVERNIGHT VISITORS			INTERNATIONAL OVERNIGHT VISITORS			DOMESTIC DAYTRIP VISITORS		
2021	2019	CHANGE	2021	2019	CHANGE	2021	2019	CHANGE
1.1M visitors	1.8M visitors	▼ 40%	31K visitors	67K visitors	▼ 54%	3M visitors	4.6M visitors	▼ 34%
3.3M nights	4.2M nights	▼ 21%	402K nights	1.5M nights	▼ 73%	-	-	-
\$444M expenditure	\$584M expenditure	▼ 24%	\$32M expenditure	\$97M expenditure	▼ 67%	\$287M expenditure	\$426M expenditure	▼ 33%

GREATER GEELONG AND THE BELLARINE HAS ALWAYS BEEN A FAVOURITE FOR THE DOMESTIC SHORT-BREAK MARKET.

OUR SHARE OF REGIONAL VICTORIA VISITATION



WHERE DID THEY STAY

- Friend's or relative's property: 49%
- Caravan park: 12%
- Rental: 9%
- Personal holiday house: 8%

WHAT DID THEY DO

- Eat out: 59%
- Visit a friend or relative: 52%
- Go to the beach: 38%
- Go sightseeing: 24%
- Go shopping: 19%

VALUE

- The region's visitor economy directly employed 7,551 people and an additional 3,713 indirectly, supporting 2,635 businesses.
- According to the local government survey the community perceived tourism as one of the three highest performing services the City of Greater Geelong provides.

WHERE ARE VISITORS COMING FROM

Over 83% of travellers are from within Victoria, half of which are coming from as close as the western and central suburbs of Melbourne.

IMPACT OF COVID-19 AND THE NEW NORMAL

THE ONCE \$1.1 BILLION LOCAL VISITOR ECONOMY IS EXPECTED TO RETURN IN FULL BY 2024

COVID-19 has directly impacted the visitor economy through restrictions on travel and social distancing and an indirect impact due to a deep, but brief, Australian economic recession.

It is expected that the indirect aspects of the recession with less spending on discretionary items such as travel will continue for far longer than the travel restrictions.

During 2020 we saw visitation, nights and travel confidence significantly impacted:

- Three of the top five industry sectors impacted by COVID-19 in Greater Geelong made up 26 per cent of the area's \$1.1 billion visitor economy.
 - Accommodation and food services are by far the hardest hit in 2020, resulting in a combined loss of \$127 million for the June quarter alone.
 - Other sectors with a significant impact on the tourism industry include retail and the arts, recording losses of \$87 million and \$67 million respectively across wider Geelong for the quarter.

THE NEW NORMAL

- A visitor economy that is largely driven by domestic day trips and intrastate visiting friends and relatives
- Busier weekends and slower weekdays
- Slower recovery in domestic holiday travel
- Slow recovery in business travel
- Drive market to become even more significant
- Change in international markets

VISITOR SPENDING

PREDICTION YEAR	2020/21		2021/22		2022/23	
ALTERNATIVE SCENARIO FOR RECOVERY	FAST	SLOW	FAST	SLOW	FAST	SLOW

Change in Greater Geelong region visitor economy direct tourism spending (after inflation) and visitor economy average total jobs due to visitor spending compared to 2018/19.

▼ 27% ▼ 37% ▼ 13% ▼ 23% ▼ 4% ▼ 10%



CHALLENGES AND OPPORTUNITIES

OUR BIGGEST CHALLENGES

- 1.** A reduced mid-week market and over-demand for weekend travel resulting in profitless volume.
- 2.** Visitor demand returning stronger and faster than the industry is capable of servicing sustainably and to standard.
- 3.** Poor transport connectivity within the Greater Geelong and The Bellarine region.
- 4.** A limited workforce with both availability and capability.
- 5.** A strong infrastructure pipeline combined with major activations on the horizon including the 2026 Commonwealth Games will require the ongoing capability building of industry.

OUR GREATEST OPPORTUNITIES

- 1.** Grow the value of the strong visiting friends and relatives' market with a focus on yield.
- 2.** The proximity and connectivity of the region to key visitor markets.
- 3.** Educate and work with the community to strengthen the perception on the value of local tourism.
- 4.** Prepare the industry for and leverage significant opportunities which include the Geelong Convention & Exhibition Centre, Commonwealth Games and Cultural Precinct.
- 5.** Addressing seasonality and reduction in mid-week visitation through regional business events, creating year-round commerce.

OUR PARTNERS FOR SUCCESS

THOSE WE WORK WITH

- Local tourism industry
- Municipal Partners
- Geelong Major Events
- Residents
- Wadawurrung Traditional Owners Aboriginal Corporation
- Investors
- Visit Victoria
- Tourism Australia
- Regional Development Victoria
- Neighbouring Regional Tourism Boards
- Victoria Tourism Industry Council
- Business events, Incentives and Travel Trade
- Media
- Local education institutions

THOSE WE STRIVE TO INFLUENCE

- Leisure travellers
- Business events and incentive markets
- Visiting Friends and Relatives and their local hosts
- Developers and investors
- International students, locally and in Melbourne

OUR MEASURES OF SUCCESS

REGION'S PERFORMANCE

1. Tourism is valued as a significant contributor to a strong, vibrant and diverse economy within Greater Geelong and The Bellarine.
2. Growth and breadth of exceptional product and experiences to support visitor demand and market trends.
3. A reputation as a distinctive and desirable destination.
4. Growth in the market share of Victoria's visitor economy.
5. A healthy pipeline of business, leisure and sporting events.

TOURISM GREATER GEELONG & THE BELLARINE'S PERFORMANCE

1. Strong member sentiment and perception of value towards Tourism Greater Geelong & The Bellarine.
2. A strong membership profile that is a true representation of the Greater Geelong and The Bellarine tourism industry.
3. Providing visitor information services to more visitors, when and where they need it.
4. Providing meaningful and valued member engagement.
5. Greater engagement and enhanced value perception with the broader community.



STRATEGIC PRIORITY #1

DESTINATION MARKETING: STRENGTHEN THE BRAND AND PEOPLE'S CONNECTION TO THE REGION TO INSPIRE A GREATER JOURNEY.

WE WILL

Develop our reputation as a distinctive and desirable destination that inspires the world to visit.

Capitalise on the region's strong visiting friends and relatives' market to drive greater yield.

Grow the mid-week and shoulder seasons to reduce the impacts of seasonality.

Engage with the region's strong domestic and seasoned visitor markets to stay longer and experience more.

BY

Leveraging our regions distinctiveness to drive interest and greater visitor yield. *Including* our major event calendar, cultural and First Nations connections.

Driving local awareness of the exceptional product and experiences unique to Geelong and The Bellarine.

Attracting and leveraging the region's strong and emerging business, leisure and sporting events as facilitators to regional exploration.

Provide visitors with the inspiration and information they need to explore the region, when and how they want it.

MEASURES OF SUCCESS

- A diversified visitor profile
- Recovery of mid-week travel
- Growth in market share
- Capture of visitor escape spend
- Destination promoters
- Repeat visitation
- Local pride



STRATEGIC PRIORITY #2

SUSTAINABLE DEVELOPMENT: PLAN FOR GROWTH THAT DELIVERS EQUITABLE ECONOMIC, SOCIAL AND ENVIRONMENTAL BENEFIT FOR FUTURE GENERATIONS TO ENJOY.

WE WILL

Ensure the region's visitor economy supports the collective interests of the community.

Strengthen the connection to the history and culture of the region's traditional owners with visitors and industry alike.

Enable businesses to succeed and grow, which benefits locals through stable, year-round employment.

Ensure tourism continues to be a significant contributor to the local economy that celebrates the unique social and environmental fabric of the region.

BY

Engaging with our Partners for Success through strategic and long-term planning.

Working with Wadawurrung Traditional Owners Aboriginal Corporation in the development of localised, authentic Aboriginal tourism product and experiences.

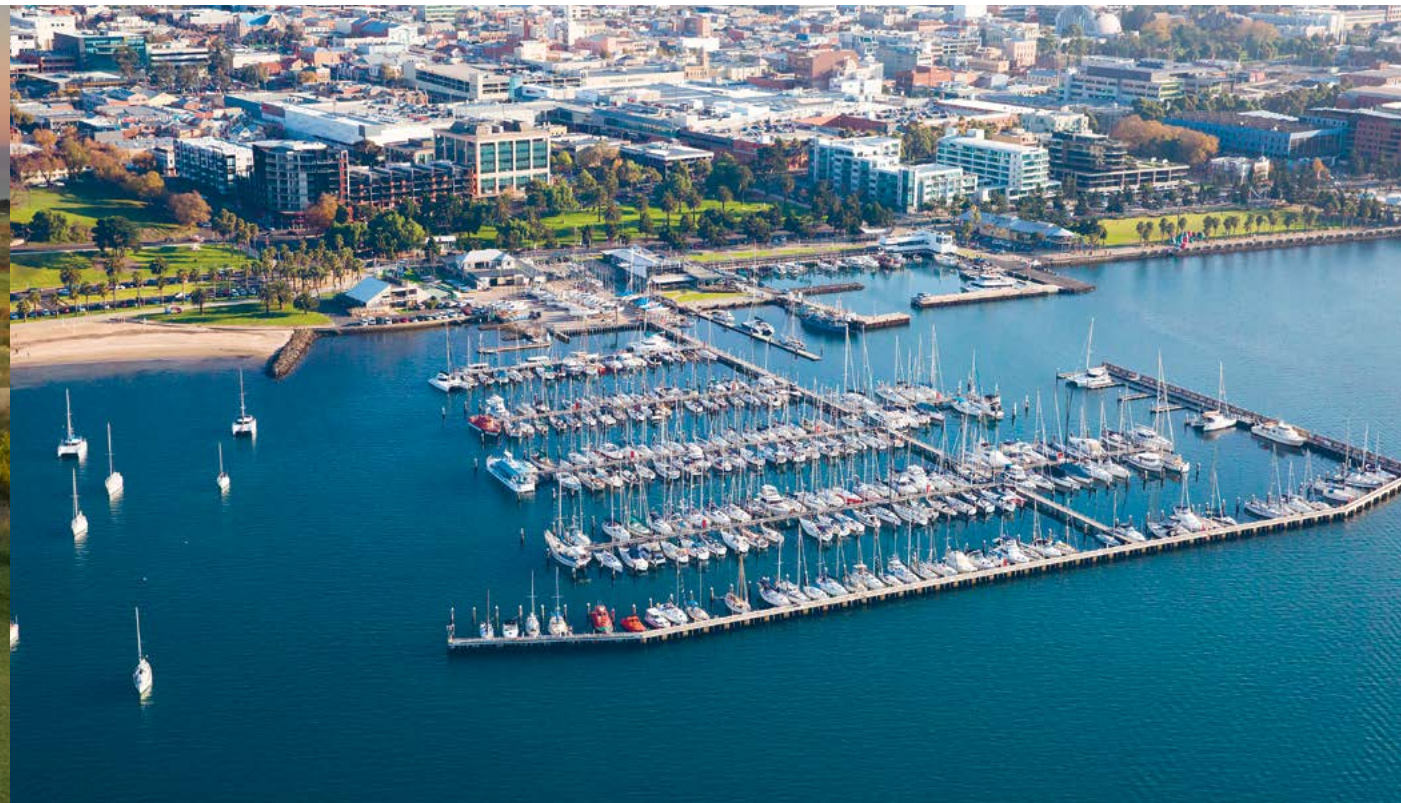
Support ongoing workforce development and capability strengthening that meets the current and future business needs and visitor demand.

Providing leadership, guidance and advocacy through long-term planning and destination management, always acting in the best interests of Geelong and The Bellarine.

MEASURES OF SUCCESS

- A strengthened workforce that is meeting business needs and visitor demands
- A diverse and suitable accommodation pool that supports the region's growing and changing visitor profile
- Progression of the investment pipeline with completion of major projects and developments as scheduled
- Tourism is valued as a significant contributor to a strong, vibrant and diverse economy within Greater Geelong and The Bellarine





STRATEGIC PRIORITY #3

STRATEGIC ENGAGEMENT: WORKING TOGETHER, DELIVER EXCEPTIONAL VALUE AND BENEFIT TO OUR MEMBERS, VISITORS, COMMUNITY AND DESTINATION.

WE WILL

Operate as the peak tourism organisation for Geelong and The Bellarine.

Maximise opportunities through strategic partnerships that provide value for industry and support the growth of the local visitor economy.

BY

Building a strong membership profile and supporting governance structure that offers a true representation of the Greater Geelong and The Bellarine tourism industry.

Collaborating with our 'Partners for Success' to leverage resources.

MEASURES OF SUCCESS

- Visitor engagement
- Recovery of the international student population physically studying in and experiencing the region
- Membership profile
- Providing meaningful and valued member engagement
- Greater engagement and enhanced value perception with the broader community (value vs importance)

STRATEGIC PRIORITY #4

INDUSTRY CAPABILITY: STRENGTHEN THE CAPABILITY OF OUR REGION TO FLOURISH.

WE WILL

Support the growth and breadth of exceptional product and experiences to realise the opportunity for our region.

Ensure businesses have the knowledge and resources they need to meet the opportunities of tomorrow.

BY

Empowering our industry with insights, guidance and advocacy to collectively, and successively deliver on our regions Sustainable Destination Development Plan.

Facilitating the ongoing improvement of business capability through training and development opportunities.

MEASURES OF SUCCESS

- Visitor sentiment
- Visitor yield
- New developments
- Member engagement through training and development programs



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