

DESTINATION DEVELOPMENT PLAN

Prepared for Tourism
Greater Geelong and
The Bellarine



ACKNOWLEDGMENT OF COUNTRY

Urbis Acknowledges the Wadawurrung people, the Traditional Owners and Custodians of the Greater Geelong & The Bellarine Region. We Acknowledge their continuing connection to the land through Culture and community and we pay our respects to Elders past, present and future.

**Wadawurrung Country*

CONTENTS

Executive Summary	8
Greater Geelong and The Bellarine Strategic Review	16
Strategic Directions	33
01 Liveability	34
02 Ignite Sport, Recreation and Wellness	38
03 Transform Access and Network Connections	42
04 Unlock Nature Based Tourism	46
05 Sustainability through Innovation and Design	50
Implementation	54

This report was issued in December 2022, with updates made in October 2023.

SUSTAINABLE DESTINATION MASTER PLAN

The **Sustainable Destination Master Plan** has been informed through a comprehensive approach which draws together findings across three reports (outlined overleaf), addressing a number of challenges that have been identified across Greater Geelong and The Bellarine (the region). The region is made up of six sub regions, all part of Wadawurrung Country, identified below.

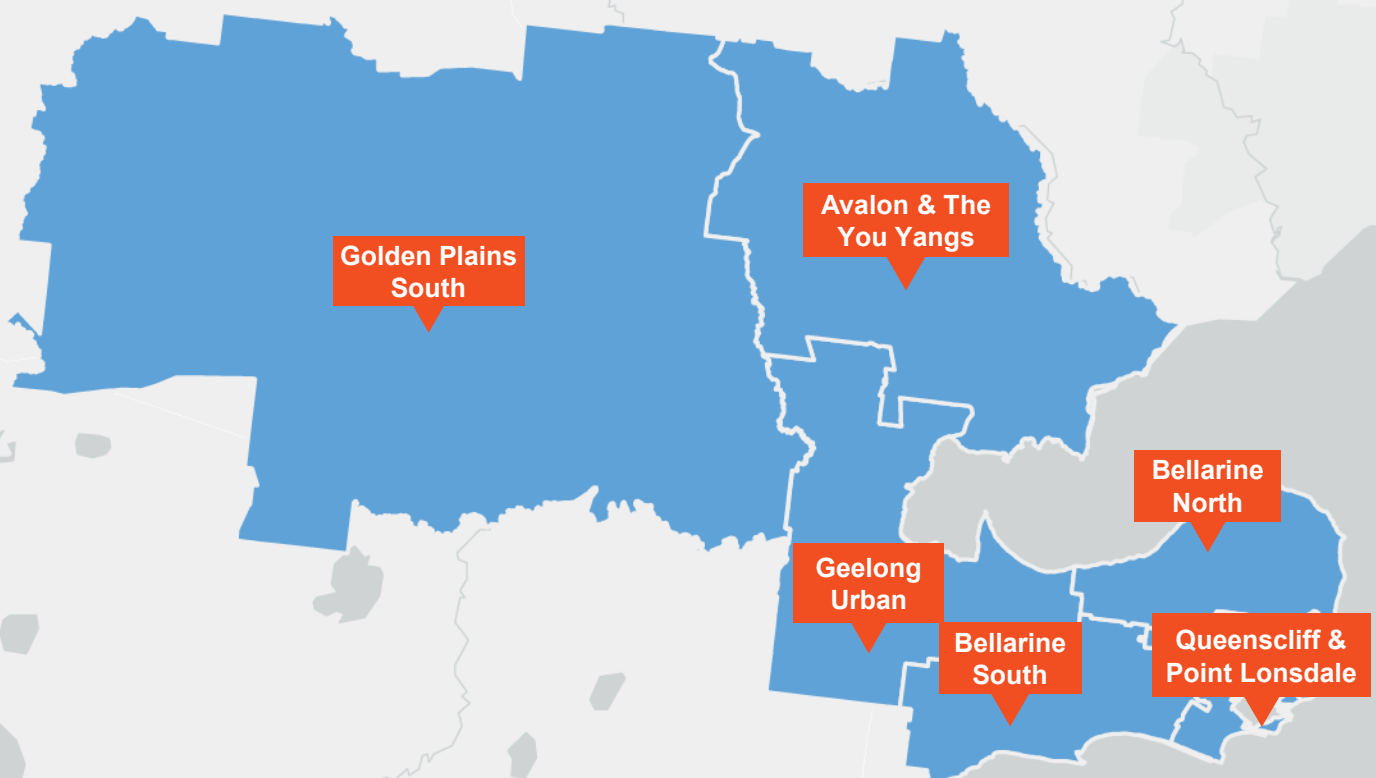
The Purpose of the Sustainable Destination Master Plan is to deliver a stronger, more resilient visitor economy for the future through identifying key Strategic Directions and Priority Projects. Key actions have been detailed as to whether they are short, medium or long term and Tourism Greater Geelong and The Bellarine's involvement; to deliver, partner or advocate for the outcomes.

Each report seeks to address sustainability, with a different focus and purpose. The outcomes of these reports also align with the United Nations Sustainable Development Goals, which provides a call to action across 17 key goals encouraging peace and prosperity for people and the planet. These reports specifically address eight of these goals as noted overleaf.

A critical component of this study was engaging with stakeholders from the region to understand the current issues and importantly the future directions and aspirations. The outcomes of the stakeholder discussions alongside detailed research have formed the basis of each report, insights from which form the Sustainable Destination Master Plan (SDMP).

Our Vision:

'Geelong and The Bellarine is a place to do, not simply see.'



Sustainable
Destination
Master Plan



Advocacy
Plan

You are
here



Priority Visitor Market Guide

Purpose: To create a sustainable year-round visitor market by focusing on key target markets.

This Guide draws together findings through engagement, as well as a review of current visitors drawn to the region, to identify the markets seen as key opportunities for the future.



Destination Development Plan

Purpose: To deliver key strategic actions that will drive sustainable change and create a year-round visitor market.

This Plan considers the key aspirational markets for the future, identified through the Priority Visitor Market Guide, as well as looks at key catalytic investment that is proposed or should be targeted to enhance Geelong and The Bellarine as a diverse tourism region in the future.

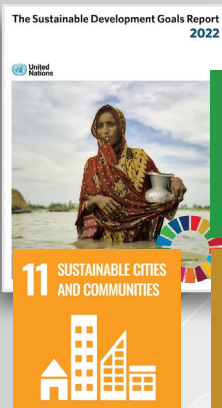


Workforce Development Plan

Purpose: To create a workforce that is largely localised and energised by a career in the tourism sector.

This Plan addresses the workforce challenges currently impacting the ability to support the required tourism jobs across the region. This Plan identifies key actions that the region can take forward to create a more sustainable and local workforce to support a growing sector in the future.

United Nations Sustainable Destination Goals Addressed



A SUSTAINABLE DESTINATION DEVELOPMENT PLAN

The Destination Development Plan plays an important role in producing sustainable outcomes that meet the ambitions of the UN Sustainable Development Goals. The plan seeks to guide Tourism Greater Geelong and The Bellarine and the broader region in developing a functional region that not only delivers great outcomes for the tourism industry, but also for the community, environment and Wadawurrung Traditional Owners. It does so through targeting key outcomes that will benefit broad sections of the community either through policy, advocacy or infrastructure delivery. Specifically, the Destination Development Plan is anticipated to achieve outcomes related to four Sustainable Development Goals.

11 SUSTAINABLE CITIES AND COMMUNITIES



TARGETS ADVANCED

- Provide safe, affordable and accessible housing to all
- Provide safe, affordable and accessible transport for all
- Enhance inclusive and sustainable urbanization
- Protect and safeguard cultural and natural heritage
- Support positive economic, social and environmental links between regions.

12 RESPONSIBLE CONSUMPTION AND PRODUCTION



TARGETS ADVANCED

- Sustainable management and efficient use of natural resources
- Substantially reduce waste generation
- Encourage and integrate sustainable practices
- Move towards more sustainable patterns of consumption and production
- Monitor and improve sustainable tourism practices.

13 CLIMATE ACTION



TARGETS ADVANCED

- Integrate climate change considerations into strategies and policies
- Promote and improve mechanisms for raising capacity for effective climate change-related planning and management.

15 LIFE ON LAND



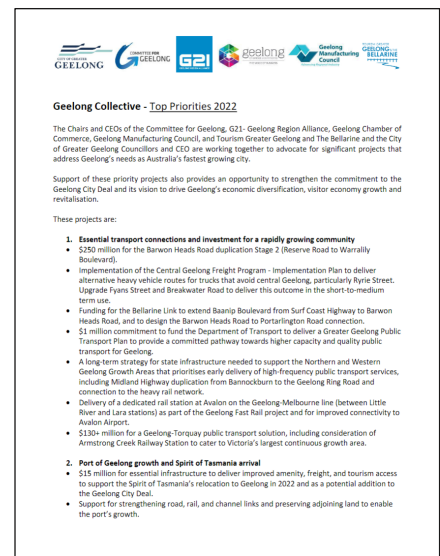
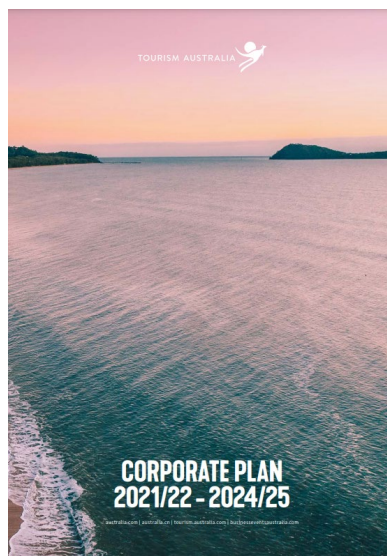
TARGETS ADVANCED

- Protect biodiversity and natural habitats
- Conserve and restore terrestrial and freshwater ecosystems

REFERENCE MATERIAL

In undertaking the preparation of the Destination Development Plan, we have had regard to a range of reference documents, including:

- Central Geelong Framework Plan (Draft), 2021
- Central Geelong Revitalisation Action Plan, 2016
- Port of Geelong, Port Development strategy 2018
- You Yangs Precinct Master Plan, June 2021
- Tourism Australia Corporate Plan, 2021-2022
- CGG Council Plan, 2018-2022
- TGGB Action Plan, 2021-2022
- TGGB Corporate Plan, 2021-2025
- Combined Qualitative Report *'Understanding the Spirit of Tasmania Traveller'*, 2021
- Barwon South West Regional Climate Adaptation Strategy, 2020-2025
- Victoria's Visitor Economy Master Plan Presentation Slides
- Geelong Low Cost Camping Review, 2022
- Geelong Collective Top Priorities, 2022
- TGGB Tourism Development Plan Summary, 2019
- Domestic Travel to Geelong and The Bellarine, 2021
- TGGB Tourism & Development Plan, 2019-2022
- Geelong Education & Workforce Profile, 2011-2021
- Brand Atlas (Geelong; Moorabool Valley; North Bellarine; Queenscliff & Pt Lonsdale; South Bellarine and You Yangs)
- How the visitor economy of the Geelong and The Bellarine region is expected to recover from the COVID recession, 2021
- Impact of Snap Lockdowns
- Impacts of the COVID recession presentation, 2021
- Pandemic impact on travel to Geelong and The Bellarine, 2021
- Visitors to Geelong and The Bellarine 2021
- Urban Insights report *'Wanderlust or wanderbust? Travel marketing in a new Australia'*, 2021
- Visitor Economy Workforce Planning & Skills Review, 2021
- Tourism Sentiment Index (TSI)



EXECUTIVE SUMMARY

Greater Geelong and The Bellarine already has a strong position in the marketplace. It is an active outdoor region, providing variety across sport and recreation pursuits, a diverse range of appealing food, beverage and producer experiences, and offers a growing range of quality Cultural experiences.

Its sub regions have distinctive differences with high appeal and provide significant draw across multiple visitor markets.

It's not a 'seen it once' trip but is always changing and repeat visitation is very high as a result. Major events act as drawcards which help to facilitate this repeat visitation.

It's the place to escape to:



Get active



Take a break and rebuild your own personal mental and physical strength and happiness



Pursue your passions, grow your skills or just explore and relax

WHERE WILL THE REGION BE BY 2032?

Innovation and design permeates every part of the tourism industry, in every sub region, with sustainability at its core. This delivers a stronger point of difference that sparks the imagination, stretches our thinking and makes every visitor more positive about our future.

Critically it is a place of high inclusivity and diversity, across all people at different ages, abilities and interests and excites and engages locals as well as visitors.

The Plan extends this solid reputation and looks to capitalise on the significant investments either planned or underway.

Through the Revitalising Central Geelong Action Plan, this push will improve the public realm and face of Geelong. The Art Centre and Gallery along with the new Convention Centre will expand the breadth and depth of visitor markets.

Key Strategic Directions (detailed overpage) have been identified to drive substantive change in the future across all target markets, with a wide variety of activities available mid-week and year-round.

Importantly, the region will experience strong growth to be driven through the Priority Projects identified for the region, which align with the developed assessment framework.

From visitor growth to workforce demand, resultant accommodation needs and new markets to emerge in the future, the region has challenges that once met will result in significant opportunity for the future growth of the region.

12.8M – 14.0M

Annual visit days in 2032 when combining Daytrips and Visitor Nights.

\$1,895M - \$2,070M

Estimated Range of Scenarios for the Tourist Spending Market in 2032.

2,065

Commercial accommodation room demand increase between 2022 – 2032 in medium scenario.






6

New Target Markets; Cultural Enthusiasts, Conference, Learners, Wellness, Gourmet Travellers, and Active Enthusiasts.

THE STRATEGIC DIRECTIONS

At its core, the Destination Development Plan considers the strategic directions necessary for the region’s tourism industry to thrive in a sustainable, community-inclusive and high-value way.

Using analysis drawn from the Priority Visitor Market Guide, which identified gaps and opportunities through the stakeholder feedback, global, interstate and intrastate trends, competitive positioning and review of the key investment areas in the pipeline, the Destination Development Plan focuses on **Five Strategic Directions** and some **Priority Actions** under each, expected to maximise the visitor outcomes for the region.

Strategic Direction	Priority Actions
 <p>Advance Liveability Improve amenity and liveability across Greater Geelong and The Bellarine through revitalising urban Geelong.</p>	<ul style="list-style-type: none"> ▪ Public realm and connectivity - Leverage investment in major projects to ensure effective precinct wayfinding, improved public realm, streetscapes and strong sense of arrival
 <p>Ignite Sport, Recreation and Wellness Develop a sophisticated and accessible network of sports, health and wellness offerings to leverage a history of, and future with sports and health in the region.</p>	<ul style="list-style-type: none"> ▪ Mineral springs - Investigate the potential of geothermal water. ▪ Health and wellness - Create a cluster of products and packages ▪ Iconic sporting events - Build on existing calendar and link with art/culture events ▪ Accessibility – ensure new and existing facilities incorporate accessible options
 <p>Transform Access and Network Connections Deliver transformational infrastructure and wayfinding initiatives to let people see more of the region.</p>	<ul style="list-style-type: none"> ▪ Avalon – Provide high frequency transit connections ▪ Spirit of Tasmania - Activate precinct and promote connectivity into Central Geelong (vehicle and non-vehicle) ▪ Sub region connection - Promote easy and accessible travel options from transport hubs to sub regions
 <p>Unlock Outdoor & Nature Based Activation Leverage and improve the open and natural environments of Greater Geelong and The Bellarine and acknowledge Wadawurrung Country, to allow more tourists and locals to engage with its natural beauty.</p>	<ul style="list-style-type: none"> ▪ Wadawurrung Traditional Owners- Celebrate and share knowledge and stories ▪ Experiential accommodation - Promote development and leverage the landscape
 <p>Excel In Innovation & Design Focused On Sustainability Incorporate a long and celebrated history of great design and innovation to make Geelong a vibrant, accessible, forward-looking and sustainable destination of choice.</p>	<ul style="list-style-type: none"> ▪ Review existing programs – better engage tourism operators and visitors to support re-use and recycling. ▪ Smart cities – showcase innovation and smart wayfinding through digitisation

WHAT DOES SUCCESS LOOK LIKE?

The Destination Development Plan sets out a number of actions that seek to shift the dial on:

- Smoothing out the peak periods by diversifying the offer; and
- Encouraging visitors to spend more by broadening the range of commercial opportunities.

There are a number of state and national based metrics that measure performance, including spend data, visitor numbers, average length of stay and level of occupancy. In addition, feedback can also be sought through sentiment-based surveys.

With reference to this Plan, some specific performance measures have been identified for each of the Strategic Directions as follows:

Performance Measure

- Cost of living improvements
- Workforce growth and diversity
- Improved nighttime economy strength - activity levels, trading hours and understanding of operator performance
- Peaks and troughs flattened (seasonality and weekday activity addressed)
- New city-based investments meeting targets

- Event calendar growth
- New sporting/activity-based products and businesses
- New health and wellness products and businesses
- Peaks and troughs flattened (seasonality and weekday activity addressed)
- Facilities new and old provide accessibility options

- Activity patterns reflect strong sub regional dispersal
- Community sentiment of transport ease
- Growth in transport associated ancillary services

- Tourism opportunities for engagement across sector and major events and positive feedback from Wadawurrung Traditional Owners
- Growth of commercial nature-based tourism products and businesses

- Greater engagement by tourism operators in increasing sustainability, measuring (scorecards/certification)
- Growth in visitor and industry engagement in environmental and social 'giving back' actions



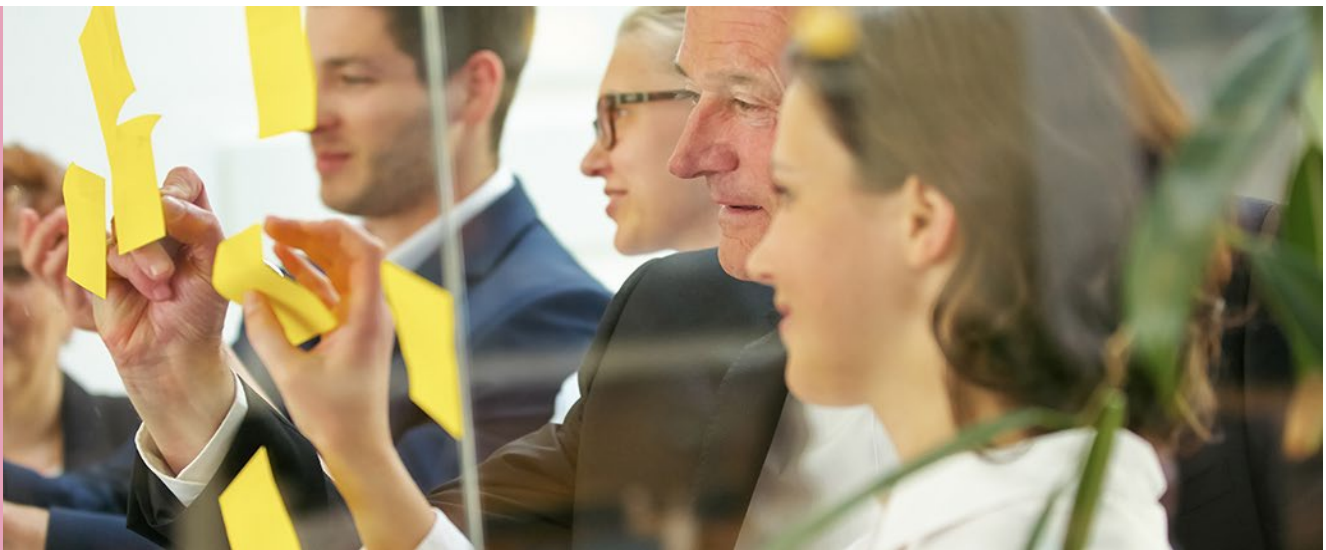
WHO WE ENGAGED WITH

Urbis have engaged in a number of one-on-one discussions with key members of Tourism Greater Geelong and The Bellarine. In addition, an online survey was also put to all members from 16th to the 25th of May.

The intention of the engagement process was to ensure targeted and strategic participation to bring to light the key issues and opportunities facing the region across the sector.

The outcomes of this process have been used to inform the strategic directions for the region. Stakeholders directly consulted included:





THERE ARE A NUMBER OF AREAS LIMITING THE BREADTH AND DEPTH OF THE VISITOR MARKET FOR GEELONG AND THE BELLARINE.



Quality and type of accommodation limiting market draw



Limited facilities to capture business market



Majority of accommodation in Central Geelong, gap on The Bellarine



Cultural precinct needs to be finished



Insufficient commercial nature-based options that appeal to current markets



Day trippers go to The Bellarine or GOR and fewer to Geelong



Lack of connectivity between the experiences in the region – need itineraries for each cohort



Developing precincts around key investment (i.e., hospitality & entertainment around The Spirit)



Workforce shortage from external market reliance



Strong seasonality and weekend/weekday troughs



Tourism is more than just hospitality, as such broader consideration is needed



Worker housing not affordable

THE CHALLENGES

The Challenges

Description

Seasonality

Positioning as a year-round option



- Seasonal nature of tourism undermines the ongoing financial sustainability of businesses
- The need to diversify the product for visitors with new experiences that are not season and weather dependent
- The importance of visitor dispersal to the sub regions

Workforce

Critical component is getting access to a local workforce



- Local residents look for better paying jobs outside the industry to deal with the cost of living, results in the loss of skills from the sector
- Broad trend of declining interest in tourism industry jobs as opportunities are seen as interim options and not career building or seen as a highly skilled profession
- Reliance on external markets (i.e. international students, backpackers etc) to fill jobs
- Inability to operate at capacity (opening for reduced hours/days) due to staff shortages

Costs

Cost pressures have been mounting



- High wage costs for businesses and worker availability has led to reduced capacity in the sector
- Cumulative losses and protracted lockdowns has created difficult business conditions
- Funding the high cost of preserving the natural environment for low value visitors

Sustainability

Pressures on the workforce and environment is pronounced during peak periods (requires levelling)



- Visitation is not all year round, which puts a strain on the industry during peak periods and limits activity during non-peak periods
- Limited public transport options for workers, visitors and residents, such as transport between Avalon Airport and Geelong
- The importance of managing visitation so it doesn't negatively impact the environment but importantly also contributes to improvements
- Gaining greater benefits from high volume, low value visitors, such as those from west Melbourne and likely visitor growth around transit transport hubs

Accommodation

Shortage of accommodation for visitors and residents impacts the regions capacity



- Lack of quality 4-5 star accommodation including near the airport and The Bellarine
- High accommodation costs makes it difficult to attract and retain workers in the tourism sector
- Lack of residential supply, which is important for supporting tourism employment
- Lack of experiential accommodation that acts as a drawcard
- Conversion of long term accommodation to short term rentals via Airbnb and other platforms reduces the supply of residential accommodation

Marketing

The regions stories and experiences are not well known



- The region lacks a unique selling proposition and it is not clear what makes it special and different
- The region's natural resources and Cultural assets are not being leveraged for commercial benefits
- There is a need for visitor experience propositions to target a high value visitor and activity packaging
- The Cultural heritage and unique stories of the Wadawurrung Traditional Owners have an opportunity to be communicated further.



GREATER GEELONG AND THE BELLARINE STRATEGIC REVIEW

This section looks at the differences between the sub regions in terms of:

- Visitation drivers
- Typology of visitation
- Origin and purpose of visitors
- Challenges and opportunities

WHAT'S DRIVING VISITATION?

The region is already diverse, how can this be enhanced towards a more sustainable tourism sector for the future?



Sub Regional Overview

GEELONG URBAN

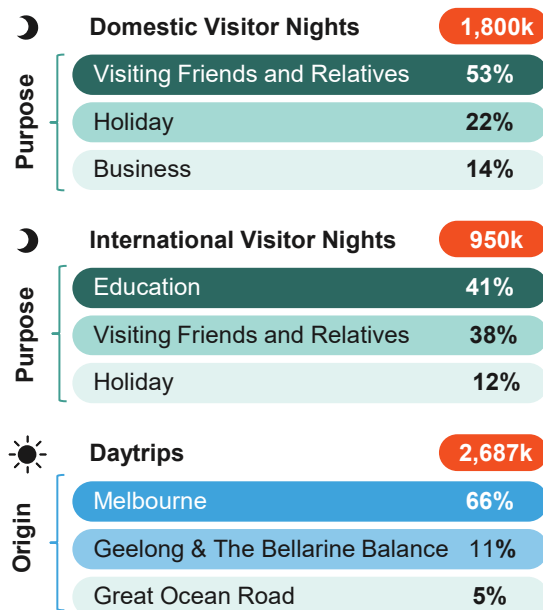
Geelong urban has the largest daytrip and visitor nights count of all sub regions. It also has a unique draw with high education visitors, due to the presence of tertiary institutions, as well as high business and VFR travel, pointing to the large employment hubs and growing residential areas. It has the least orientation with holiday visits of all sub regions.



Visitor Challenges

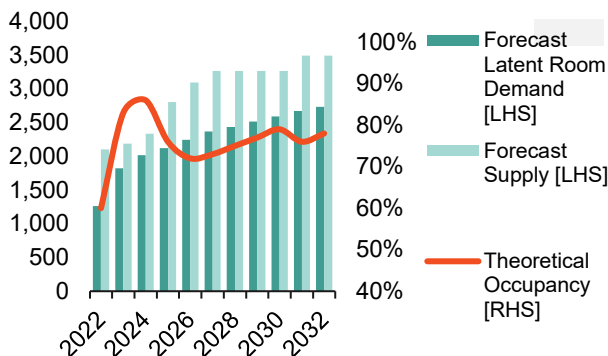
Geelong Urban is expected to have sufficient supply of commercial accommodation to hold the growth in its visitor base out to 2032. This is a combination of having less reliance on holiday travellers, one of the key groups requiring commercial accommodation, and the significant pipeline of projects. The challenge for Geelong Urban will be to improve the attractiveness for holiday goers as well as business travellers whilst maintaining a healthy occupancy level that provides spill-over accommodation for other sub regions and spikes due to major events.

Type of Visitation (2017-19 Average)



Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR; Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.

Workforce Challenges

Geelong Urban has a significant investment pipeline that will grow workforce demands to 2032. In particular there will be challenges related to increased patronage in food services, accommodation and arts and cultural events. The current baseline growth in the workforce for these sectors will not be sufficient to meet the needs of industry, and hence drawing in additional staff and training will be of high importance. Geelong Urban will be a base from which travellers connect to other regions, seeing a need to grow transport operators.



Geelong Urban is the dominant place of employment across all industry types, however, has a proportionally larger share of the following:

- Arts and museum services
- Education and training
- Sports and other events

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- Quality 4-5 star accommodation in central location
- Broader dining options, events and visitor focused activities along the Waterfront
- Annual events calendar using existing infrastructure
- Conferencing/business events/exhibitions
- Gateway, connectivity and precinct around the new Spirit of Tasmania



Sub Regional Overview

AVALON & THE YOU YANGS

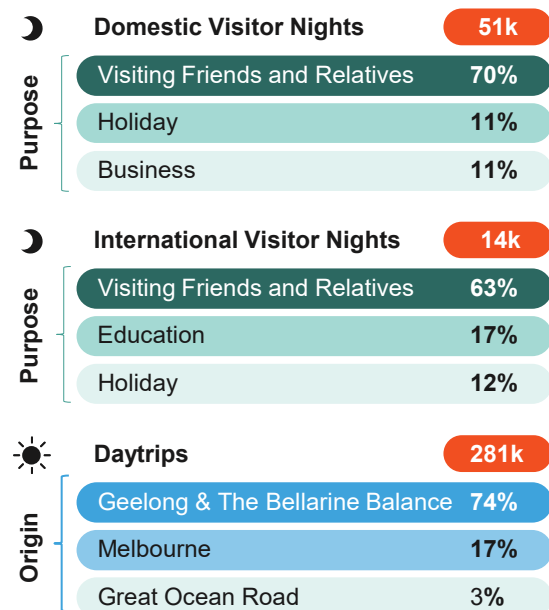
The Airport is clearly the greatest attractor, followed by the You Yangs Regional Park. It thus picks up a lot of holiday, overnight trips and sizeable daytrips to and from the airport by locals as well as those from Melbourne's West.

Visitor Challenges

Many are visiting the Avalon & The You Yangs for a daytrip to the You Yangs Regional Park and Serendip Sanctuary. With very few accommodation options this limits the ability to turn these daytrips to overnight stays. The presence of Avalon Airport and its potential to drive visitation to the broader region should not be understated.

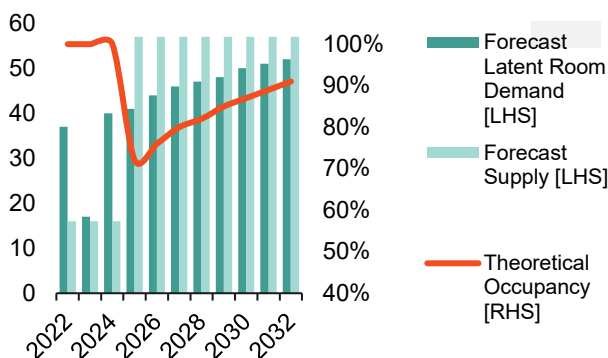
Promoting growth in domestic and international flights will need support from a transport connectivity perspective as well.

Type of Visitation (2017-19 Average)



Source: TRA

Forecast Supply & Demand for Accommodation*



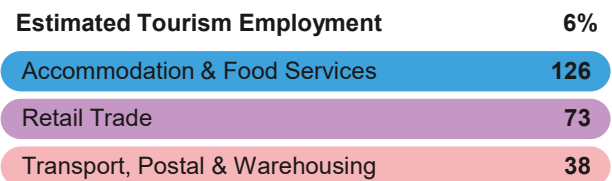
2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR; Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.

Workforce Challenges

With Avalon Airport and significant nature-based offers, Avalon & The You Yangs has distinct workforce challenges over the next year. Skills will be required in areas of transportation and logistics above baseline growth in the sector. Further to this, sports and recreation activity guides and staff will be needed given expected growth in nature-based tourism. While no developments are in the pipeline, it is also anticipated that staffing additional accommodation offers will be difficult given historically low supply in the region.



With the unique role and offerings of Avalon & The You Yangs, the region has a proportionally larger share of the following areas:

- Transport and logistics
- Wholesale trading services
- Outdoors recreation activities

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- Arrival experience, amenities (retail), accommodation and transport links to and from Avalon Airport
- Quality eco tourism offers leveraging local environment

Sub Regional Overview

GOLDEN PLAINS SOUTH

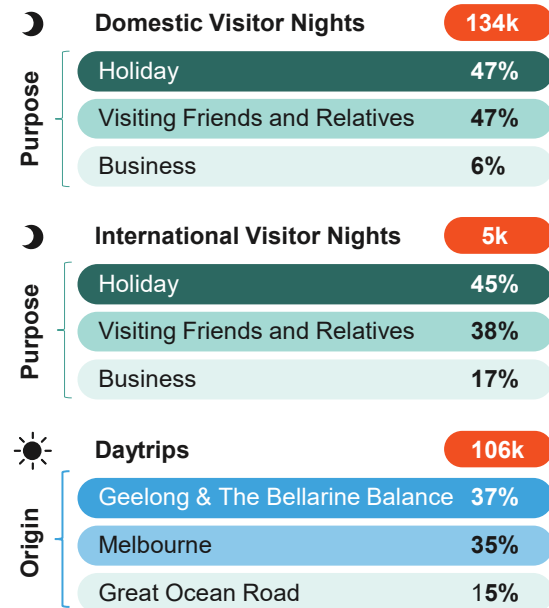
Key destinations from Human Movement Data show Meredith Amphitheatre (from the two festivals), the Moorabool Valley Taste Trail and trips through the Brisbane Ranges National Park, contribute to the dominance of holiday trips.



Visitor Challenges

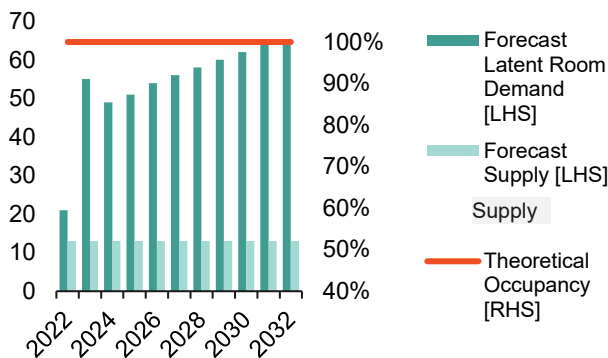
Golden Plains experiences relatively low visitation compared to the other sub regions. The area is predominantly rural, with its main visitor drawcards, for reasons other than visiting friends and relatives, being festivals and wineries. Accommodation options are also minimal, meaning most visitors are usually camping at the festival or travelling for daytrips from other locations. The primary challenge is therefore attracting greater visitation that would then warrant investment into an additional commercial accommodation facility.

Type of Visitation (2017-19 Average)



Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR; Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.

Workforce Challenges

Golden Plains South does not have a significant tourism visitation workforce and is therefore unlikely to experience as acute a challenge in these traditional areas. With expected growth in the agri-tourism opportunity in the region, workforce challenges are likely to arise in logistics, farm-gate tourism operators and in attracting the unique skillsets required to operate immersive experiential offers. Further to this, during festival events, a surge in capacity requirements may see challenges in the short to medium term.



As part of the agri-tourism offer in the region, and with little high-volume accommodation, Golden Plains South has a proportionally larger share of workers in the following areas:

- Agriculture and farming services
- Wholesale trading services
- Outdoors recreation activities

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- Short term accommodation (e.g., caravan park, cabins)
- Transport links
- Nature-based tourism
- Larger events calendar

Sub Regional Overview

BELLARINE NORTH

The foreshores and commercial cores of each of the towns along The Bellarine North coastline drive the majority of visitation to the sub region. Holiday overnight trips and local resident daytrips are the most commonly seen trip types.



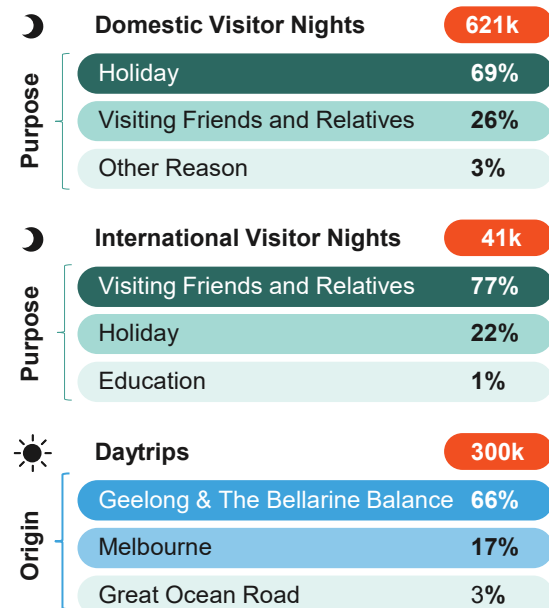
Visitor Challenges

Bellarine North facilitates a wide variety of activities for its visitors. However, the issue of seasonality in beachside towns affect year-long use. Bellarine North also only hosts 107, 3-star and 4-star hotel rooms, despite the popularity amongst visitors indicating the sub region is an ideal holiday destination. Transport is also an issue, with only two bus lines serving the sub region at limited times.

Workforce Challenges

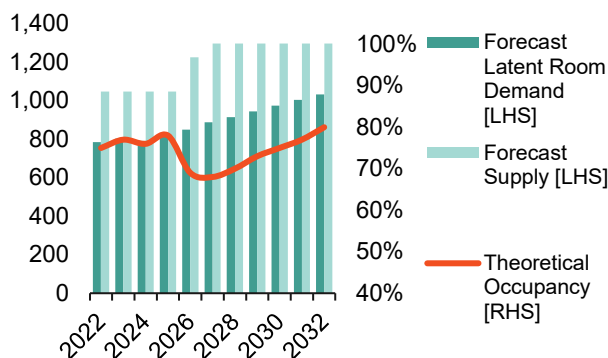
Bellarine North has a holistic tourism offer, requiring the full suite of skills and workforce needs in the area. As a result, there will be challenges in fulfilling accommodation, food and retail workers, as the region competes with Geelong Urban and Bellarine South for both talent and convenience for workers. Beyond this, the retail core in the area will require some specialist operators along with logistics for agri-businesses.

Type of Visitation (2017-19 Average)



Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR, Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.



With a strong accommodation and recreation base, Bellarine North has a proportionally larger share of the following:

- Retail managers and operators
- Accommodation and food service workers
- Procurement and logistics specialists

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- Diversity of accommodation (i.e., hard accommodation, beach pods, cabins, experiential)
- Health and wellness
- Touring opportunities
- Transport links to Central Geelong/other sub regions
- Active transport networks
- Dining options

Sub Regional Overview

QUEENSCLIFF & POINT LONSDALE

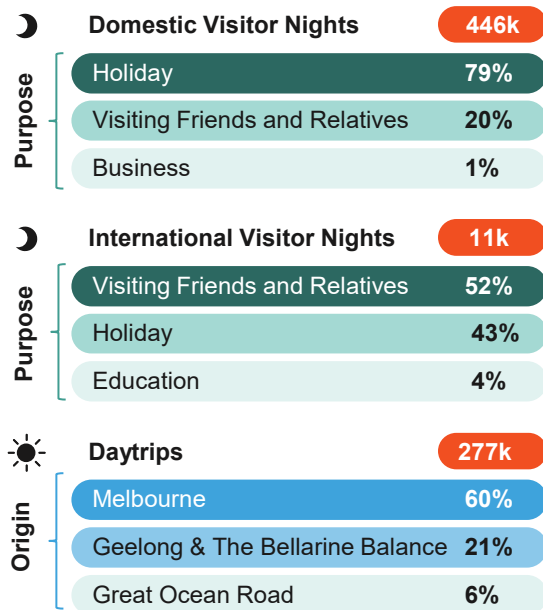
Queenscliff Harbour and Ferry, the Shortland Bluff area and Point Lonsdale foreshore are popular destinations for those in transit, taking summer holidays and daytrips across the Bay or on the Drysdale to Queenscliff rail.



Visitor Challenges

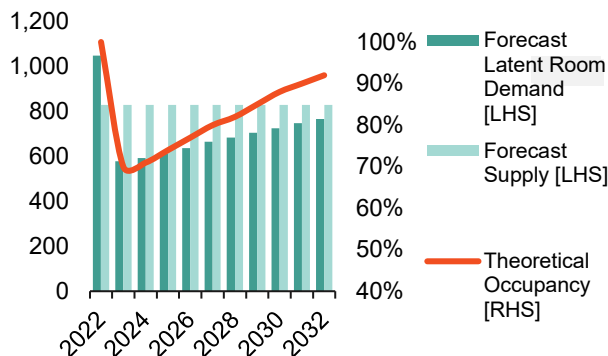
As with all sub regions within The Bellarine, transport, seasonality and accommodation are all key challenges for visitation. These sentiments were also highlighted by key business stakeholders in the sub region through various forms of engagement. Limited space alongside a high concentration of demand has led to a forecast shortage of accommodation options within the sub region itself. Visitors are likely looking to Barwon Heads and Ocean Grove as spill-over locations for accommodation.

Type of Visitation (2017-19 Average)



Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR; Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.

Workforce Challenges

Queenscliff and Point Lonsdale offer unique services and experiences to tourists in the area. Of particular note are the ferry services, as well as a series of historical sites and cultural activities. As a result, there will be workforce challenges in ensuring the right skills are available for operators in the area, including in the passenger transportation space and in heritage tourism operations. Furthermore, a lack of additional accommodation supply will keep issues of supply in this space minimal in the area.



With unique services and offers in the region, Queenscliff and Point Lonsdale have a proportionally larger workforce relating to:

- Passenger transportation operators
- Supply chain and logistics workers
- Cultural and other arts tourism operators

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- Affordable 3–4-star accommodation (modernising/diversifying of existing offer)
- Sense of arrival from Ferry Terminal
- Health and wellness offer (e.g., salt baths utilisation)
- Transport links to Central Geelong/other sub regions
- Main Street sense of arrival

Sub Regional Overview

BELLARINE SOUTH

From the Human Movement Data (HMD), visitors tend to visit Ocean Grove and Barwon Heads as well as further south at Thirteenth Beach including the golf course, and up north at Adventure Park Geelong. Holiday trips are subsequently high, particularly from Melbourne into the many holiday homes.



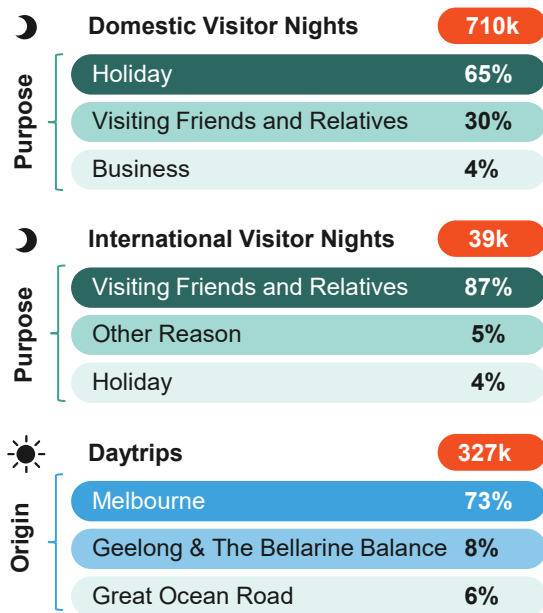
Visitor Challenges

A major challenge for visitation in Bellarine South is seasonality. The HMD indicates that visitation is highest during the summer, while tapering during the colder months. Transport is also an issue in this sub region, with limited public transport offerings making it difficult to travel around without a car. Whilst there is plenty of supply in the sub region, it is predominantly Caravan Parks and Airbnb's, which mainly service holiday visitors.

Workforce Challenges

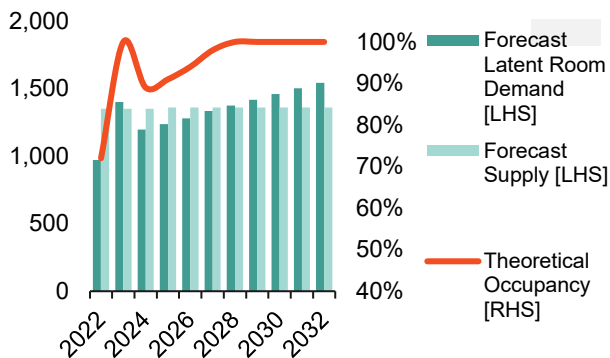
Bellarine South has a holistic tourism offer with a particular focus on the beaches and natural seaside environments that continue to draw tourists to the area. As a result, there will be challenges in fulfilling accommodation, food and retail workers as well as a need for specialist recreation, retail and accommodation operators. A core challenge in the area will be its connectivity and access to labour markets in Geelong Urban, as well as ensuring workers can live, work and operate their businesses in an increasingly expensive area.

Type of Visitation (2017-19 Average)



Source: TRA

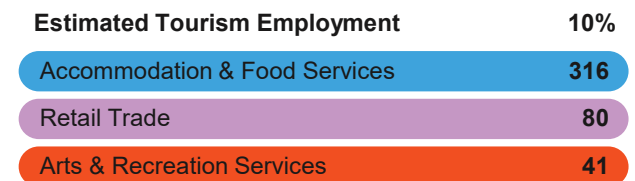
Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.

Source: TRA, STR; Urbis

*An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.



With a strong accommodation and recreation base, Bellarine South has a proportionally larger share of the following:

- Accommodation and food service workers
- Arts and recreation operators
- Hiring and other wraparound services

Experience Gaps (Identified through engagement)

Current gaps in experience include:

- 3-4 star accommodation (e.g., farm stays, boutique, cabins etc)
- Range of visitor experiences and products
- Transport links to Central Geelong/other sub regions
- Gaps in existing and planned active transport networks
- Enough critical mass to support more trading hours of businesses (e.g., wineries)

FUTURE OUTLOOK

This section takes a forward look at the outlook for the region.

The region is in a strong position with a number of investment projects recently completing, underway or set to happen over the next 10 years. This will drive the ability to draw aspirational markets and grow visitor levels and spending into the region. Of course, with more visitors, gives rise to the need to provide an aligned workforce to support the tourism industry.

To understand the opportunity for the region to 2032, this section looks into:

- Development activity (significant projects)
- Resultant visitor and spending growth
- Future workforce growth and shortages
- The specific skills needed in each of the sub regions.



DEVELOPMENT ACTIVITY

There is a considerable amount of development activity recently completed or proposed across the region around transport, infrastructure, culture and arts, sports, entertainment and convention. These projects will better cater to existing, as well as attract new markets, driving up growth in visitors and spending within the region.



Aug 2022

Wurriki Nyal | \$220M

This civic precinct is newly completed and will include 2,600 sqm of new community spaces, a city office and customer service centre.



Oct 2022

Spirit of Tasmania | \$135M

Recently opening its new home at Corio Quay, the Spirit of Tasmania is set to benefit the region, delivering more visitors on the doorstep of Central Geelong.



Apr 2023

Queenscliff Ferry Terminal - City Deal | \$16M

This newly completed ferry terminal includes a café and bar, ticketing and retail area, toilets, kitchens and a passenger lounge. External improvements consist of a new boardwalk and redesigned carpark, as well as upgraded pedestrian and disability access.



2024

South Geelong - Waurn Ponds Rail Duplication | \$1B

Currently underway to accommodate strong population growth, stages 2 and 3 will see the duplication of 8 km of the Geelong rail line, upgrades to South Geelong and Waurn Ponds stations along with also improving the 400m South Geelong tunnel bottleneck.



2025-2027

You Yangs Masterplan | \$11M

In alignment with the aspirations of Wadawurrung Traditional Owners, the masterplan includes options to upgrade the visitor information centre, car parks, picnic and BBQ areas along with the existing tracks and trails to support greater visitation by 2025.



Jul 2026

Convention & Exhibition Centre | \$294M

The new Geelong Convention and Exhibition Centre is anticipated to include a 200-room luxury hotel and commercial spaces, 1,000 seat plenary venue and 3,700 sq.m of multi purpose space when completed in July 2026.



Aug 2023

Geelong Arts Centre – Redevelopment | \$140M

Funded by the Victorian Government, the upgraded centre features three performance spaces: a 500-seat theatre which can expand to accommodate up to 800 patrons, a 250-seat theatre and a black box theatre. Additional amenities include dining spaces, an improved box office, new administration facilities and an outdoor atrium. Completed in August 2023.



Late 2023 – Early 2024

GMHBA Stadium Redevelopment | \$142M

The stage five redevelopment of GMHBA stadium will significantly increase capacity to host over 40,000 people on completion in 2023. The stadium will also gain an indoor cricket club, a new entry plaza and change rooms, and a sports museum.



2023

CBD Revitalisation Project – City Deal | \$38M

Funded by the Victorian Government, the revitalisation of Central Geelong will be an ongoing set of initiatives to attract jobs and growth. Initiatives include the Green Spine through the city connecting Geelong Station and Eastern Park, further upgrades to the waterfront, as well as public realm upgrades to Johnstone Park, anticipated all to be completed by 2023. The Geelong Train Station upgrade is expected to occur beyond this time.



2027-2032

Geelong Gallery Upgrade | \$114M

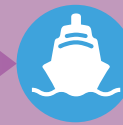
A **business case** is being prepared to facilitate the expansion of the Geelong Gallery to facilitate additional exhibition and programming space.



2023*

Geelong Rail Corridor Upgrades

Ongoing upgrades to the Melbourne-Geelong rail corridor including rail duplication, station upgrades and level crossing removals from South Geelong to Waurn Ponds and ongoing network planning of Geelong Fast Rail.



2032

Portarlington Safe Harbour Master Plan | \$58M

Early planning underway for new facilities for boating related activities including 145 commercial and recreational berths, capacity to accommodate a future ferry service and tall ships. Landside developments include the construction of a town square, playground, foreshore landscaping and a commercial development. There is potential for this project to be staged over a 10 year period.



Ongoing

Avalon Airport | Unknown

Avalon Airport continues to recognise the rapidly growing tourism market through continually reviewing the airlines servicing the region and future opportunities in this space. Passenger loads are expected to continue to grow with a focus on drawing in more international carriers in the future.

- Arts & Recreation
- Commercial Precinct
- Transport
- Park Redevelopment
- Entertainment Venue

DEVELOPMENT ACTIVITY DRIVING VISITOR GROWTH

Tourism plays a major role in the regions economic landscape. In 2019, tourism accounted for over \$1b in direct and indirect spending in the local economy and supported over 5% of the total labour force directly.

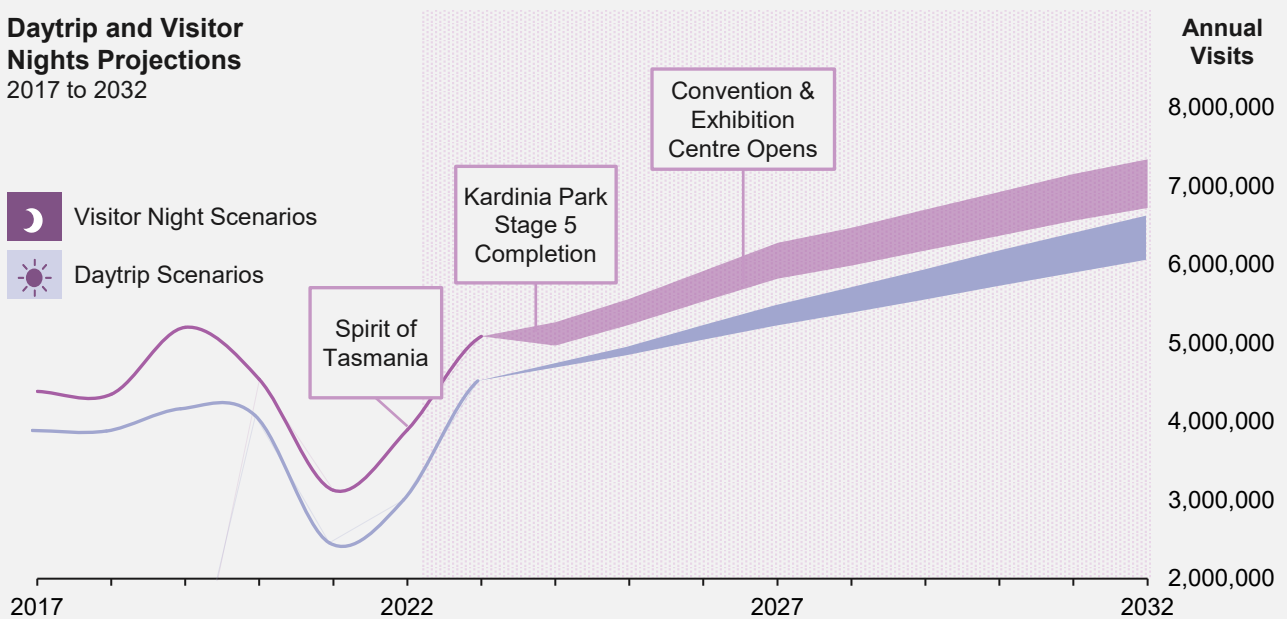
With significant investment in projects such as the Spirit of Tasmania, the Geelong Convention and Exhibition Centre and a bolstered cultural precinct, the region will see higher levels of visitation across the next ten years and beyond. Furthermore, the proximity to Melbourne, the supply of additional accommodation and improved transport connections, will make this a regional Hub destination for international visitors.

The graph below identifies the influence of key investment on visitor levels under three scenarios over the 10-year horizon.

- **Under a baseline scenario**, compared to 2019, visitor nights are expected to increase by around 40% and daytrips by 20%.
- **The high growth scenario** assumes the region can harness the catalytic impacts of the significant investment by increasing its functionality and attractiveness, resulting in an increase by 40% in daytrips and 50% in visitor nights.

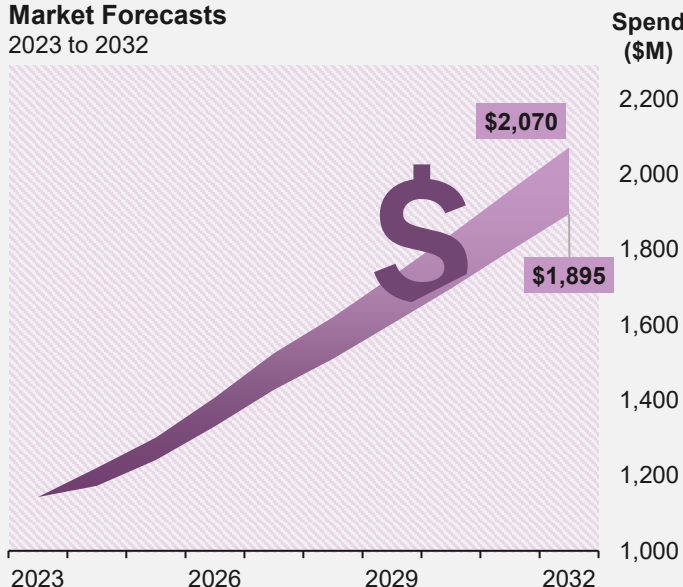
Tourism will re-emerge as a dominant contributor to the economy over the next 10 years, spurred on by known investment and further enhancement of the regions offers.

Daytrip and Visitor Nights Projections
2017 to 2032



Source: ABS, TRA, State Budget 2021-22, Cordell, City of Greater Geelong; Urbis

Visitor Spending Market Forecasts
2023 to 2032



Source: ABS, TRA, State Budget 2021-22, Cordell, City of Greater Geelong; Urbis

Growth in visitation will see spending across the region increase year on year through to 2032. It is anticipated that an increase of an additional ~\$1.1 billion above the previous 2019 high, will be seen under the high growth scenario.

Tourism spending growth will be underpinned by new offers across the region. It is expected to outstrip growth in other areas of the economy, given unprecedented investment in the capacity for tourism delivery.

Spending patterns have also changed markedly since 2019. The average spend has increased post-COVID, with an increased proportion of it realised in services accommodation and retail.

ACCOMMODATION NEED AT MEDIUM SCENARIO

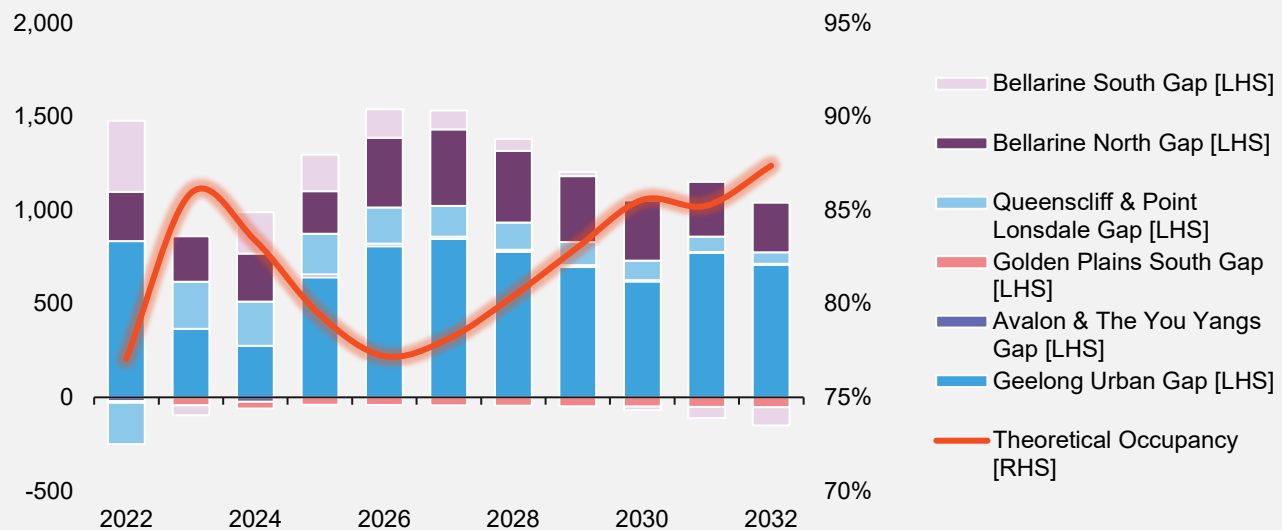
Visitor night projections have been here transformed into accommodation demand. This was done by using an average persons per space ratio and removing the proportion who utilise private accommodation. To the right we have shown the annual additional demand for accommodation at the medium scenario. See the bottom legend for sub regional splits.

Annual growth looks to average around 180 to 220 new commercial accommodation rooms per annum (or 2,065 rooms by 2032), predominantly in Geelong Urban and also in the three Bellarine sub regions.

Supply additions are mostly within Geelong Urban despite the demand being spread around the tourism region. This stock is largely hotels and serviced apartments around the Geelong CBD. Centralisation of accommodation options may push overnight trips to the CBD from which they will take daytrips to the regions on the side. This will reduce the average visitor spend for the sub regions as overnight trips spend around \$140 per day compared to \$90 for day-trippers.

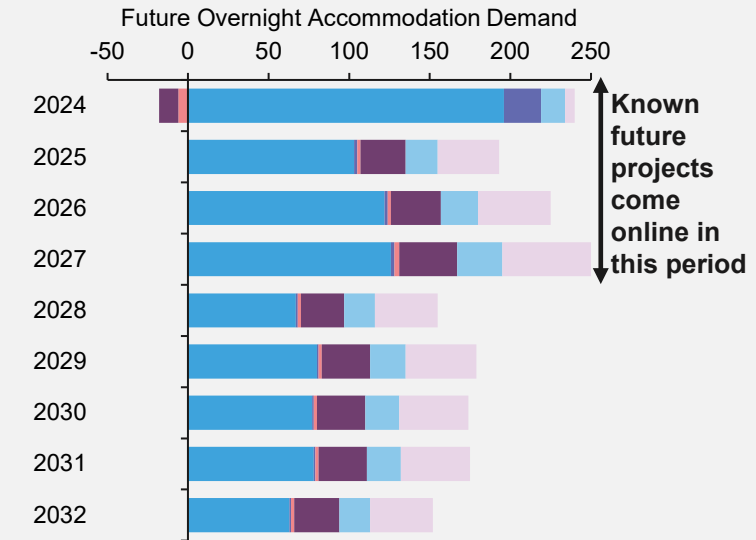
Below we have shown the gap that emerges between demand and supply when comparing the prior two analyses. Theoretical occupancy in 2022 is around 77%, that is, demand amounts to approximately 77% of supply. This figure will push towards 90% by 2032 if there are no supply additions beyond 2027. An occupancy level this high will put strain on any short term events or bursts of visitation in the region, given just under 75% is the typical occupancy level of the region (see page 38).

Net Room Capacity (LHS) of Local Commercial Accommodation vs. Implied Occupancy (RHS) Medium Scenario FY2022 to FY2032



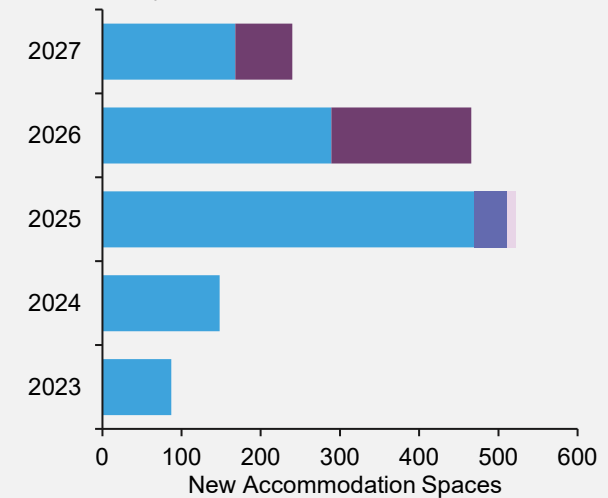
Source: ABS, TRA, State Budget 2021-22, Cordell, City of Greater Geelong; Urbis

Future Annual Demand Growth by Sub Region Medium Scenario FY2024 to FY2032



Source: Cordell, City of Greater Geelong, REMPLAN; Urbis

Future Annual Supply Additions by Sub Region Known Supply FY2023 to FY2027



Source: Cordell, Urbis

VISITOR GROWTH MEANS A LARGER WORKFORCE IS NEEDED

DEMAND FOR WORKERS

Workforce demand has been calculated to understand workforce needs by 2032. This has been done using input-output modelling and data on proportional tourist spending.

For each dollar predicted to be spent, the industry that this spending will flow to, and therefore the employment inferred by that spending, has been calculated.

COVID-19 has seen a shift in the spending profile for the region, shifting away from education toward accommodation, food, retail and arts and culture. It is expected that this spending will normalise with the return of pre-COVID tourism activity by 2026.

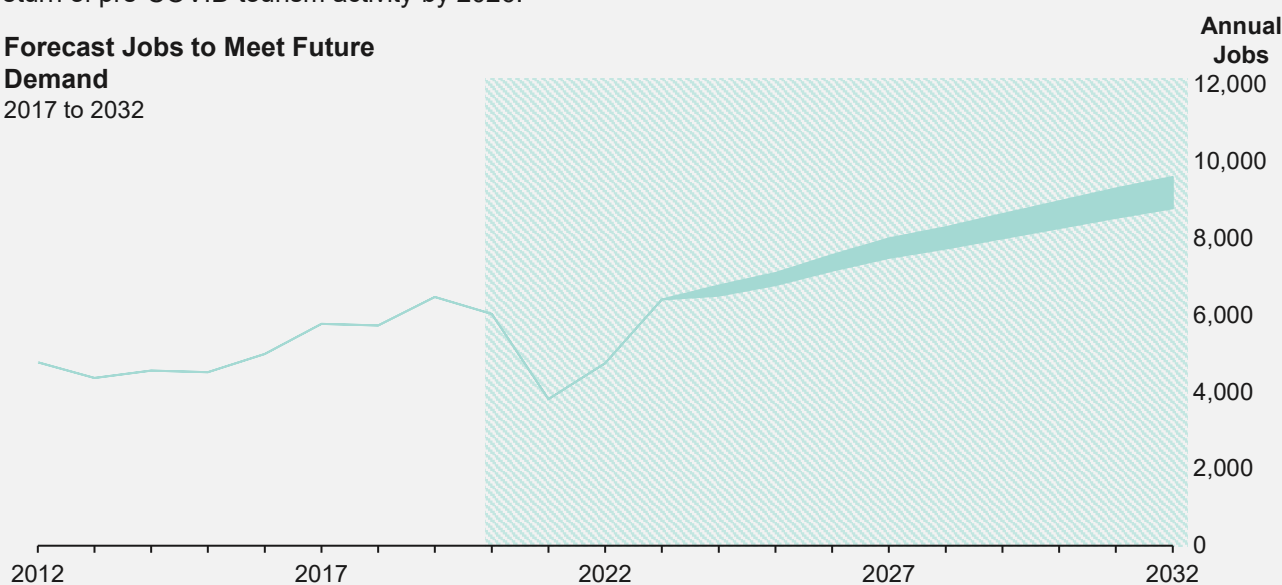
Future demand for jobs has therefore been forecast to grow:

- From 6,400 in 2023 to 8,780 under a baseline scenario.
- To 9,600 under a high growth scenario in 2032.
- This represents a growth of between 36% and 48%, respectively, from the previous 2019 high.

The strategic investment planned for the region is expected to see spending, and hence jobs demanded, dominated by accommodation, food services, retail and arts and recreation through to 2032.

Forecast Jobs to Meet Future Demand

2017 to 2032



Source: REMPLAN, ABS, TRA, Urbis.

SUPPLY OF WORKERS

Greater Geelong is expected to experience significant population growth over the short, medium and long-term as the region becomes a popular place for young professionals and families to live and work. This means there is significant growth in the workforce expected through to 2032 across all sectors, and therefore a natural growth in the tourism workforce.

combined with REMPLAN benchmarks, the total local tourism workforce supply in the region has been estimated. The total workforce will grow from an estimated 5,890 in 2023 to 8,190 in 2032, an average growth rate of 4% per annum.

Note: Growth will not be consistent across sectors and does not consider changes in unemployment or underemployment that may take place.

Using population and workforce growth estimates,

Estimated Tourism Allocation – 2032

Allocation using modified 2019, 2021 and 2023 REMPLAN benchmarks

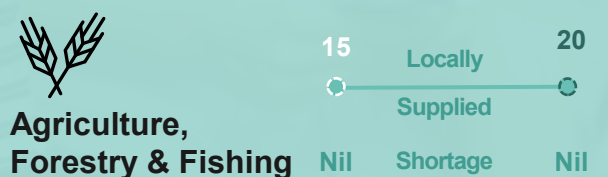
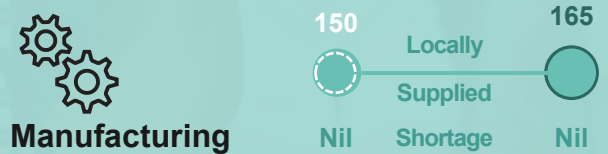
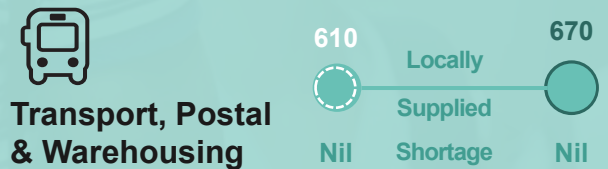
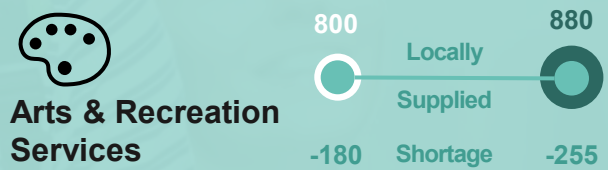
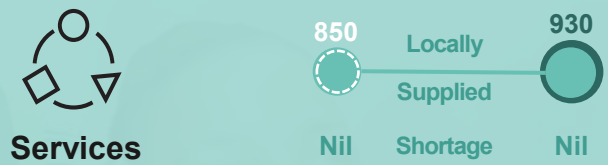
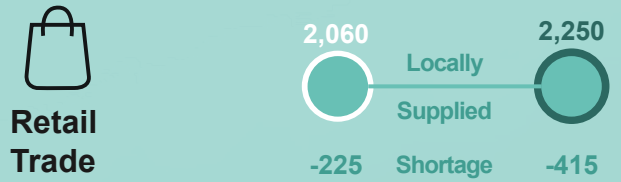
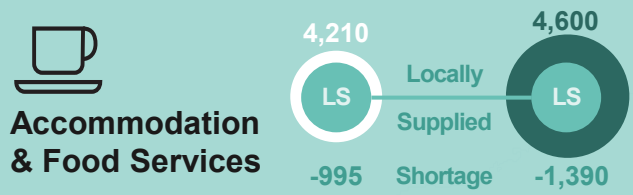
Accommodation & Food Services 3,200	Retail Trade 1,830	Services 980
Arts & Recreation Services 630	Transport, Postal & Warehousing 1,080	Manufacturing 190
Wholesale Trade 130	Agriculture, Forestry & Fishing 150	Σ Total 8,190

Source: REMPLAN, ABS, Victorian Government, TRA, Urbis. Rounded to nearest 25



Demand and supply in 2032

Legend ● Baseline ● High tourism



Source: REMPLAN, ABS, Victorian Government, TRA, Urbis.

DESTINATION DEVELOPMENT PLAN – STRATEGIC DIRECTIONS

The reason for visiting the region is diverse and shaped by a range of smaller and larger destinations. The Five Strategic Directions adjacent, developed for this Plan have been selected to drive fundamental improvements, expanding the reason for visiting, creating more reasons to stay longer and enhancing the visitor experience.

Improvement within the tourism sector, including through infrastructure and services upgrades, will allow the region to build and strengthen its competitive positioning, capitalise on major post COVID trends and diversify and grow its target markets. The Strategic Directions start to address and capture the target markets that have been identified in the **Priority Visitor Market Guide**, through key investment. The focus of these Strategic Directions also supports the ability to minimise past issues, including those around seasonal and mid-week peaks and troughs and areas of profitless volume.

Each Strategic Direction supports the following elements:

Moveability	Improved accessibility and ease to a connected travel network
Utilise Outdoor Space	Where people come to ‘recharge their batteries’ (mental wellness)
Active Options	Active, engaging, immersive and accessible options helping people explore, learn and challenge themselves in sport, recreation, hobbies, arts and Culture and environment on a year-round basis (stretching mentally and physically)
Forward Looking	Featuring positive approaches and solutions, showcasing leadership
Stronger Market Capture	Appeal to multiple identified domestic priority target markets and attract the type of international visitation desired (longer stay, higher spend).
Wadawurrung History	Identify aspirations in the Wadawurrung Country Plan 2020-2030 and grow the appeal of all operators in the region. Paleet Tjarra Dja – Lets make Country good together!
Embeds Sustainability	Every element of tourism management, products and experiences are aligned

These five major region-shaping Strategic Directions, will drive changes in tourism for Geelong and The Bellarine across the next 10 years and beyond. While much is already underway, this Plan focuses on the actions needed to improve the capacity of tourism to both drive and leverage these changes to create better outcomes within the tourism sector.

Importantly, the actions also influence wider regional development work helping ensure the tourism sector clearly delivers and maximises the desired community and regional improvements via tourism growth – creating sustainable outcomes for visitors and the community. This in turn, significantly improves liveability, and local resilience and flexibility, that flows to support workforce development initiatives.

Notably, these five Strategic Directions are not stand-alone, and the actions leverage each other, helping outcomes to be achieved.



01

ADVANCE LIVEABILITY

Objective:
Improve amenity and liveability across Greater Geelong and The Bellarine through revitalising urban Geelong.



02

IGNITE SPORT, RECREATION AND WELLNESS

Objective:
Develop a sophisticated network of accessible sports, recreation, health and wellness offerings to leverage a history of, and a future with sports, recreation and health in the region.



STRATEGIC DIRECTIONS

03

TRANSFORM ACCESS AND NETWORK CONNECTIONS

Objective:
Deliver transformational infrastructure and wayfinding initiatives to let people see more of the region.



04

UNLOCK OUTDOOR AND NATURE-BASED ACTIVATION

Objective:
Leverage and improve the open and natural environments of Greater Geelong and The Bellarine and acknowledge Wadawurrung Country to allow more tourists and locals to engage with its natural beauty.



05

EXCEL IN INNOVATION AND DESIGN FOCUSED ON SUSTAINABILITY

Objective:
Incorporate a long and celebrated history of great design and innovation to make Geelong a vibrant, accessible, forward-looking and sustainable destination of choice.



> 01 ADVANCE LIVEABILITY

OBJECTIVE

Geelong is a civic and travel powerhouse. By continually improving the liveability of Central Geelong, there is a great opportunity for improved draw to the city from both leisure and business travellers.

About this Strategic Direction

Liveability is core to the attractiveness of any city, both to the people who live there and those who travel there. It encompasses:

- The ability for people to move freely and safely around the area
- Ease of access to services such as housing, shopping and medical services
- Maintaining a sense of vibrancy and diversity within the region.

As the central core of the region and the major transport hub, Central Geelong will provide a highly appealing point of difference to Melbourne and create its own drawcard.

Its capacity to create a contemporary, highly accessible and well-connected region, through strong sub region linking, will be essential to encourage visitation and grow spending. An improved central city will support a significant volume of businesses across hospitality, creative arts, retail and support services.

As a strategic direction, liveability focuses on further developing the enablers, both tangible and intangible, to foster a year-round, active feel to the city. In turn, this year-round activation will allow businesses to flourish and better support the events, festival offerings and nighttime economy.

Liveability is also a major drawcard for

interstate and international visitors. There is opportunity to leverage the region's increased connectivity to interstate locations, through the Spirit of Tasmania, growth in Avalon Airport and major investment in landmark developments in the Geelong CBD which can further establish Geelong as an entry point for interstate and international visitors with the ability to drive further activity into the sub regions.

Capitalising on the UNSECO City of Design status will be key. This can be done through the city's expanding arts and Cultural precinct centred on the Geelong Arts Centre, Geelong Gallery, Geelong Convention and Exhibition Centre developments and associated Cultural attractions. Sharing the Cultural significance of the region through stories of place from the Wadawurrung Traditional Owners should be seamless as part of the development of these public assets.

As an urban hub, Central Geelong will showcase the depth of diversity, Culture and ease of access, enabling visitors to explore and enjoy their passions. It can be the regional hub for Victoria.

With the Revitalising Central Geelong Action Plan underway, the priority actions following will build upon this and aspire to capture new visitor markets to support the ambitions of the city.

ACTIONS

The following actions will seek to leverage the existing development activity and planning underway as well as, identify other development and key infrastructure projects to enhance Central Geelong over the next ten years.

Alignment with strategic framework documents

1.1 Support the objectives of the Revitalising Central Geelong Plan, Central Geelong Action Plan and Central Geelong Framework Plan (Draft)

- Capitalise on proposed investment including Revitalising Central Geelong, Arts Centre, Gallery and Geelong Convention and Exhibition Centre (GCEC) and the weekday draw of these assets. Leverage the expected growth in visitation and diverse nature of these markets from this investment (e.g., arts and culture, conference/business market).

Enhance the specific objectives designed to:

- Encourage creativity and vibrancy across the city throughout the day and night.
- Improve public infrastructure, urban realm, streetscapes and key assets to improve visitor connection to place. Focus on the key connectivity spines such as Moorabool Street and sense of arrival from Geelong Station.

Greater activation

1.2 Enhance Geelong Waterfront

- Provide a broader range of locally sourced dining options, connecting Geelong to the regions, to create a true dining and meeting destination. Food options need to cater to the different visitor markets.
- Work with cafes/restaurants to deliver improved takeaway options to encourage picnicking across the green spaces.
- Connect the heritage of the waterfront to the stories of the Wadawurrung Traditional Owners through Cultural placemaking (e.g., informative signage, installations, sculptures, naming).
- Link the waterfront to the arts precinct through better wayfinding encouraging Cultural tourism.
- The masterplanning of Western Beach, including the urban landscape and infrastructure, to help in activating the beach.

1.3 Create a strong nighttime economy

- Actively create a more diverse nighttime economy through a series of outdoor events (e.g. outdoor theatre, flexible spaces for music events, art installations, leverage key buildings through light shows and accompanying music, family friendly events).
- Review restaurant trading hours to encourage dispersed usage, greater activity and to drive further spend.
- Create distinct and unique sub-precincts across the CBD for cafes and restaurants, guiding visitors more easily to key destinations.

1.4 Encourage and support outdoor activities

- Provide urban activities linked to sport and recreation options (e.g. swimming, walking/cycling, active transport).
- Provide the appropriate facilities to support growth, such as female-friendly, regional level sports and soccer facilities and major sporting precincts.
- Provide cross-generational options within the public realm and open space network (e.g. fun playgrounds, climb-able public art, skate parks, small BMX trails, bouldering and climbing walls).

1.5 Support new markets and greater spending opportunities through investment activity

- Encourage flexible work hubs promoted as part of the visitor experience encouraging 'bleisure' travel, including conference attendees, giving this group reasons to stay longer.
- Promote products, itineraries, Cultural tourism opportunities through targeted marketing directed at growth markets.
- Create a hub for administrative services (accountants, marketing, web design) that can provide a paid suite of services for the tourism sector.

1.6 Encourage greater flexible space options

- Create spaces for mini events and pop ups with the required infrastructure (power, flooring, seating) in place or easily transported.
- Ensure these spaces provide innovative sustainability including solar powered lighting, visible and unique waste/recycle options.

1.7 Investigate better connectivity between locals and visitors

- Local residents play an important part in the visitor experience. Review better ways to link these two through various programs such as:
 - ‘Live like a Local’ tours.
 - Engagement in citizen science
 - Volunteer activities
 - Create trained and supported volunteer groups for large scale event management to allow for peak period requirements.

Improved services and visitor experience

1.8 Create a walkable, highly connected central city

- Create inclusive/accessible, safe and well signed links providing walk and ride options through the central city.
- Provide links leading to and connecting with key areas including Arts and Cultural precinct, Kardinia Park, Geelong Waterfront, Deakin campus, retail core, Eastern Beach / Botanic Gardens and key transit hubs. Use wayfinding to link the key locations.

1.9 Encourage an improved range of accommodation options

- Lobby to grow the range, scale and quality of accommodation in Central Geelong, ensuring:
 - High visibility within the marketplace including ease of booking, allowances for group bookings and packaging with tickets and accommodation/attractions.
 - Fast-tracking and facilitation for the planning and construction of accommodation-based proposals.

- The location of accommodation to leverage investment activity around the Arts and Cultural precinct, Kardinia Park events, Geelong Convention and Exhibition Centre, Geelong Waterfront and in proximity to Avalon Airport.
- Availability, awareness and alignment of the product offering to extend the stay of conference/business and sporting visitors.
- A wider range of options such as experiential accommodation and overnight facilities for larger vehicles (RVs and caravans). This is part of the range of accommodation needed and critical to support the Spirit of Tasmania.

1.10 Support improved wayfinding across the city

- Provide innovative wayfinding support to link key precincts. This should include both digital (through QR codes) and signage, to better improve movement patterns.
- Consider fast and easy digital connections, utilising smart city technology as set out in the Smart City Strategic Framework, developed by Council.

1.11 Support the development of affordable housing

- Support workforce growth and retention by encouraging initiatives that deliver affordable housing outcomes.
- Review initiatives such as subsidised housing, re-purposing of existing accommodation including student accommodation to support a growing workforce.



WHY LIVEABILITY?

It is important to reflect on the benefits of the key actions detailed to understand how this will deliver a more revitalised and liveable Central Geelong area.

From a sustainability of tourism perspective, this Strategic Direction will deliver benefit:

- Through more sustainable levels of visitation that have access to diverse experiences including being active, enjoying locally produced food and wine, events, culture and heritage.
- With better signage and linkages making visitors more active and aware of their surrounds across Central Geelong.
- By creating flow on effects of dispersion into the regions by being better connected and understanding the draw of the region.
- By allowing the ability to build flexible campaigns around different visitor markets (solo traveller, VFR, conference/business travellers attached to the GCEC, extend the day-tripper to overnight as well as families and inclusive travel).
- Through year-round outcomes and across mid week and weekend.
- In building on the global trend around the 'bleisure' traveller and becomes the place for the digital remote workers to visit for inspiration and rejuvenation.

From a regional / community perspective, this will drive:

- Increased liveability and appeal of the city and surrounds, supporting residential amenity and workforce development initiatives.
- Greater awareness and management of impacts from tourism growth on the local community.

FUTURE MARKETS TARGETED?

The **Priority Visitor Market Guide** identified six aspirational personas, with this Strategic Direction expected to capture the following:



> 02 IGNITE SPORT, RECREATION & WELLNESS

OBJECTIVE

We value being active and healthy to balance our busy lifestyles. Geelong and the Bellarine will be seen as a destination to escape for outdoor endurance sports, recreation and health and wellness, leveraging the existing infrastructure and the strong natural environments of land, coast and bay.

About this Strategic Direction

The region is known for its diversity and range of sport and recreation pursuits exciting people to visit and participate. The area is already a major “outdoor playground” for metropolitan Melbourne as well as the wider regional Victorian market.

The region should be synonymous with a high level of open space, quality facilities accessible to all, a range of adventures (for beginners to high level and elite competitors) and a place to pursue and enjoy hobbies, sports and passions.

There’s a focus on marrying key sports with allied tourism products in a manner that drives spend, repeat visitation and mid-week and year-round visitation such as:

- One-week coaching clinics for popular sports (e.g., cycling, running, surfing, paddleboarding, ironman/ triathlon, rowing)
- Facilities that can be multipurpose (e.g., AFL, cricket, little athletics)
- Outdoor pursuits that enable people to trial and experiment with new challenges (e.g., climbing, mountain bike hubs)
- Activities needing dedicated locations (e.g., golf, sailing, and aero pursuits)

- Sports and activities that require hiring of equipment (e.g. bike riding, surfing and kayak/canoe).

The pandemic has emphasised the value and importance of physical and mental health and wellness. This Strategic Direction will see a contemporary and unique positioning around health and wellness resulting in the region being a key destination for such activities.

The region will support personal challenges, mental and physical, and people growing their abilities, but also build social cohesion, through sport and recreation, engaging youth and diverse communities.

Shift the dial on sport and recreation, extending this to include health and wellness, and delivering a commercial tourism outcome.

ACTIONS

The region is well-placed with a diverse natural environment and existing infrastructure. The following actions will help to promote the region as a hub for sports, recreation and health and wellness over the next 10 years and beyond.

Marrying key sports with allied tourism products

2.1 Grow the sphere of influence of sports pursuits

- Create more coaching and training opportunities. This could be through coaching clinics that provide training at all skill levels, coordinated school camps through to elite camps that leverage the existing infrastructure.
- Promote links to food and beverage to support spectator and participant needs. Include healthy options, cafes and flexible/pop ups to support overflow and key events requirements.
- Foster growth of allied services, such as sporting gear, hire services to further enhance the offer. Planning for these uses should be in key locations to leverage synergies.

Be known for icon events

2.2 Use icon events to build year-round visitation

- There are a number of sporting events that are key drawcards to the region and beyond including the Cadel Evans race, Festival of Sails and Head of the School Girls rowing. This visitation can be maximised by linking the annual sports calendar with the art/culture calendar.
- It will be critical to ensure that linking calendars avoids significant overlap, which can cause congestion and poor availability of accommodation and services, if not managed.

2.3 Enhance key sporting infrastructure

- Review options to grow the influence of the Kardinia Park Precinct:
 - Leverage GMHBA Stadium redevelopment to capture greater movement and activity to and from the stadium to key landmarks such as

dining options in Central Geelong.

- Better link the precinct to Central Geelong through improved wayfinding and upgrades to the streetscape and amenity of the Moorabool Street spine.
 - Support more attractive and frequent public transport options on game day and major events to create this improved linkage.
 - Leverage high visitation from events through partnering with other key stakeholders such as accommodation operators, to extend visitation to overnight and drive greater spend and visitation opportunities through the region.
 - Reduce impact of events at stadium on the use of other facilities (netball, swimming) through more precinct-based communication between the key stakeholders.
 - Ensure that the future master plan seamlessly integrates all facilities, and balances competing needs from the different levels of sport and
- 2.4** maximises the potential of the precinct.

2.4 Grow the range of other sporting facilities

- Encourage broader participation by providing more inclusive facilities such as accessible change rooms and female-friendly facilities.
- Meet demand and growth by providing a regional indoor sports facility that can cater to growing sports including futsal, volleyball, gymnastics, badminton and table tennis.
- Support growth in soccer and provide regional facilities catering to both participants and spectators.

Health and wellness tourism

2.5 Grow the health and wellness (both physical and mental) appeal

- Identify key sites across the region that can be developed and have a wellness link, creating a destination and cluster of uses for both tourists and the community.
- Work with existing operators to create a range of product/packages.
- Promote links to healthy eating through locally produced food and beverage aspects.

2.6 Review the market capacity and opportunity for mineral bathing

- Undertake a hydrogeology review to identify the existence of any thermal water across The Bellarine. Such an offer would need to be well positioned in a unique location with an appealing outlook.
- Should a site be found, becoming part of the Great Victorian Bathing Trail, linking Geelong and Bellarine to the whole of the State, would further enhance exposure and visitation. The benefits are multi-pronged, from thermal bathing including:
 - Removes seasonality, creating year-round visitation.
 - Drives spending to other allied health and wellness uses as well as towards accommodation, food and beverage.
 - Once seasonality is taken out, this can support a local workforce, with initial skill requirements and frequent upskilling opportunities – thus making this a more attractive career option (e.g., recent Government Grant with Chisolm University to develop a Health, Wellness and Bathing Diploma, year 1 in 2024).

Accommodation needs

2.7 Ensure accommodation meets different requirements

- The range of accommodation needs to speak to the different groups targeted, including sporting groups, those running or participating in coaching clinics as well as through sporting camps.
- Wellness accommodation should appeal to this growing market and recognise the wide spectrum of target markets, not just high-quality accommodation.

2.8 Leverage the landscape further

- With diverse landscapes, this gives rise to vast opportunities. Encourage tracks, a shared network of trails throughout the region and options where visitors and community can participate together, enhancing outcomes for both groups.
- Provide a shared network of cycling trails that connects the different sub regions across The Bellarine and into Central Geelong.
- Leverage the value of road cycling in the region created from the Cadel Evans Race, by encouraging more opportunities for this sport.

2.9 Create allied health opportunities

- Cluster physio and other allied health uses around key precincts such as Kardinia Park and key sporting infrastructure.
- Connect students at Deakin University's School of Medicine directly into practical experience and future employment in the sports health field at completion of studies.
- Grow inclusive tourism such as short-term recuperation from surgery and 'recovery tourism' to be much better activated.



WHY SPORTS, HEALTH AND WELLNESS?

From a sustainability of tourism perspective, this Strategic Direction will deliver benefit:

- By creating year-round, high spending, repeat visitors.
- By providing beginners, older/less experienced participants more opportunities.
- To the passionate sporting enthusiast, already visible across areas such as cycling, triathlon, equestrian, sailing, running, rowing. These type of sports require dedicated space and facilities that cities can rarely provide.
- To recreational enthusiasts interested in golf, fishing, scuba diving, climbing, adventure activities and surfing (noting these can have competitive events also).
- Through high participation sports such as football, cricket and soccer
- By substantively growing repeat visitation and increase spend from traditional regular visitor markets (summer beach families, day visitors etc..) who may be less likely to participate in 'commercial tourism' but will engage in sport and recreation activities.

From a regional / community perspective, this will drive:

- Better sport and recreation facilities and activity opportunities for locals.
- Greater local access to medical support including extending physio and recovery support through to education and school links.
- Business growth through retail, hire, service support, for sports with specific needs.
- Greater preventative mental and physical health and wellness behaviours and facilities available to locals to improve community outcomes.

FUTURE MARKETS TARGETED?

The **Priority Visitor Market Guide** identified six aspirational personas, with this Strategic Direction expected to capture the following:

Wellness
Travellers

Lifelong
Learners

Active
Enthusiasts



For a full breakdown of the six aspirational personas, please refer to the **Priority Visitor Market Guide**.

> 03 TRANSFORM ACCESS & NETWORK CONNECTIONS

OBJECTIVE

Geelong and The Bellarine will be known for its seamless and inclusive transport connectivity and the ability to transfer between different modes to access the sub regions. The region will become a preferred alternative to Melbourne for certain target markets, and it is just as easy and practical to do Melbourne as a day trip from a base of Geelong by train or ferry.

About this Strategic Direction

The major access gateways of Avalon Airport and the Spirit of Tasmania port are leveraged to ensure transit and touring visitors stop and spend time dispersing into the sub regions creating local spend. An attractive sense of arrival around the Spirit of Tasmania exists with ease of connectivity into Central Geelong.

Ease of access and transfers between road, rail, boat, flights make planning, booking and undertaking travel easy. Links include parking hubs (for varying vehicle sizes), and a network of dedicated and shared paths around cycling/walking that have considered safety and ease for visitors and locals during day and night.

Inclusivity and safety is well developed across the entire network. Compared to many parts of Australia, where vehicles are essential, this region stands out as an easy travel location particularly around public transport and low carbon travel options.

As Melbourne grows and becomes busier, particularly in the western corridor, this area becomes a far more attractive option for those seeking to avoid major congestion.

The linkages include a range of travel options into each of the sub regions supporting the range of target markets.

This work also has sustainability clearly embedded in it, including the development of appropriate 'light touch' solutions for markets such as cruise ships. Instead of major dredging and port development, the use of swing mooring options in Corio Bay and tendering ashore meets market needs and preserves the amenity of the Geelong foreshore with much lower costs and environmental impact.

ACTIONS

The following actions will underpin greater visitation and visitor experience, as better movement and access will unlock the attractiveness of the region over the next ten years and beyond.

Enhance the major transport nodes

3.1 Build visitor precincts around Avalon Airport and Spirit of Tasmania to maximise spend and encourage overnight stays.

- For **Avalon Airport** this includes:
 - Providing suitable accommodation nearby, so that visitors can stay overnight. This type of development aligns with other airports of this scale and will be bolstered by expected business activity through the future business parks. This allows people to not just transit through the region to Melbourne or the Great Ocean Road, and rather encourages activity within Geelong and The Bellarine.
 - As an interim solution, connect the Airport to Lara Train station, through a regular scheduled shuttle service. Road upgrades are expected to facilitate this connection.
 - As a longer-term solution, provide a high frequency transit connection between Avalon and Central Geelong, in line with growth in passenger loads. This could be a station at Avalon Airport as part of the planning for Geelong Fast Rail.
 - As part of the international tourism recovery, advocate for direct flights to and from Avalon Airport that capture key growth markets.

For the new home of the **Spirit of Tasmania** at Corio Quay this means:

- Encourage through future revisions of the Port of Geelong, Port Development Strategy, greater focus on visitor amenity, including the streetscape and surrounding environment. This will ensure this location is not just seen as a vessel embark/disembark location.
- Create a positive sense of arrival with clear and safe connections into Central Geelong for vehicle and non-vehicle movement. Support improvements to road infrastructure as well as

better connections and wayfinding along the waterfront all the way into Central Geelong.

- Provide passive transport options such as e-bikes to encourage movement along the waterfront.
- Add support services for the range of vehicles embarking/disembarking. This can include RV/caravan services, retail, camping shops, repairs, tyre needs etc.
- Foster appealing food and beverage experiences in this location encouraging those embarking to visit prior to and while waiting for departure. Encourage concepts that drive visitors to arrive early, such as a micro-brewery, distillery.

3.2 Capture cruise ship visitors to the region

- Extend the current usage of swing mooring options for cruise ships and tendering ashore, to also capture cruise ships that are docked in Melbourne for shore-based excursion activity.
- Create new sub regional itineraries for shore-based excursions that support spending locally.
- For these day visitors, ensure links to transport are available to extend the sphere of influence beyond Geelong and into the other sub regions.
- Develop a strategy to target the luxury cruise ship market, including packages and an offer which showcases high-end experiences in the region.
- Work with cruise line operators to promote Geelong and the sub regions as a 'must visit' destination on Australia's east coast.
- Promote a better environmental and more cost-effective solution to capture the growing cruise ship market, while also not upsetting the views across the waterfront.
- Engage with Wadawurrung Traditional Owners for ceremonies to Welcome visitors to Country.

3.3 Create contemporary travel options

- Encourage the development and promote a low carbon footprint suite of travel options that are easy, attractive and fun such as train or walk/cycle legs.
- Prioritise and promote easy travel options from transport hubs to sub regions.
- Create shuttle “runs” to start and finish points of some walks/trails, including bike rides.
- Ensure disability access is well embedded in the range of options. Undertake an audit to ensure pathways and connections have accessibility options and work to ensure future design outcomes are all inclusive.
- Support current work creating a shared pathway linking all sub regions. These paths need to be well connected to key tourism locations with interruptions, such as road crossings, minimised where possible. Signage, wayfinding, QR Codes and information should be encouraged along these shared paths.
 - Create networks and options separating walkers and bike lanes where needed to increase safety and enjoyment.
- Ensure road safety is addressed in delivering the above outcomes.

3.4 Re-visit transport needs as tourism grows to ensure transport can service the region

- Tourism growth will be driven by a number of factors (detailed in the Priority Visitor Market Guide), and therefore the visitor economy should be a key consideration of any ongoing future planning for Geelong's integrated transport network.

3.5 Align transport outcomes with the G21 Transport Strategy

- Reduce car dependency through alternate transport options.
- Improve accessibility across all transport types.
- A climate-neutral transport system that champions active and public transport.

3.6 Marketing the connectivity

- Capture wider cross regional touring markets (e.g. GOR, Great Southern Touring Route) through the development of itineraries which leverage the regions transport links.



WHY A BETTER ACCESS AND TRANSPORT NETWORK?

From a sustainability of tourism perspective, this Strategic Direction will deliver benefit:

- By growing target visitor markets and length of stay in the region, particularly around low carbon travellers, touring markets through to promoting greater dispersal and spend.
- By creating wider appeal as a range of travel options suiting different target markets are delivering ease and practicality for travellers. Travel options are simple, bookable and flexible.
- By enhancing the strong access in the region to multiple modes of transport (air, rail, ferry and road), by providing better connections to move through the region.

From a regional / community perspective, this will drive:

- Improved liveability for residents and workers with ease of access and greater travel options – locally and more widely.
- Travel patterns of visitors enhance resident amenity and doesn't create frustration due to traffic/poorly thought through infrastructure considerations or road safety issues.
- A wide range of ancillary business is developed around transport growth – including diversity of hire car services, passive transport options, park'n'ride/short term storage options for Melbourne visits.

FUTURE MARKETS TARGETED?

The **Priority Visitor Market Guide** identified six aspirational personas with this Strategic Direction expected to capture the following:

Wellness Travellers

Gourmet Travellers

Active Enthusiasts

Cultural Enthusiasts

Conference Travellers

Lifelong Learners



For a full breakdown of the six aspirational personas, please refer to the **Priority Visitor Market Guide**.

> 04 UNLOCK NATURE BASED TOURISM

OBJECTIVE

Geelong and The Bellarine will be recognised through its innate beauty and the ability to see, hear, touch, feel, smell, walk, swim and experience it first-hand. Strong education and understanding of our natural environments, connection to the community and regenerative tourism will be at the forefront.

About this Strategic Direction

The great outdoors have always been the major driver of Australia's domestic traveller and a key reason international visitors come to Australia. This region is no different with a wide array of natural attractions, both terrestrial and marine, and significant parks and reserves. It is an easily accessible outdoor playground for Melbourne residents, particularly western Melbourne.

The attractions are well known including walking trails around bird areas and have a strong market positioning to other regions such as the beaches on the Great Ocean Road and bushwalking in the Grampians.

The region is different. It has nature and adventure-based strengths combined with strong commercial propositions addressing the target markets. With proximity to Melbourne, family friendly and immersive experiences including 'giving back' options create a strong point of difference expanding satisfaction, repeat visitation, length of stay and engagement of existing target markets.

The point of difference can be enhanced by clearly linking this with Strategic Direction 5. This engages visitors in a wide variety of

experiences that demonstrate aspects of sustainability and importantly add to the mental wellbeing of visitors and increases satisfaction.

The outdoor and nature element is a major domestic and international driver, so all businesses celebrate Geelong and The Bellarine's environment. It should be embedded as a feature in diverse ways via public art, providing bird baths at accommodation locations, featuring dusk nocturnal wildlife walks through to the use of technology such as webcams on bird nests.

Marine and aquatic options should be highlighted as market research shows these are a continuing high appeal market across Australia.

Working with the Wadawurrung Traditional Owners to support Cultural values of place and Language and embedding this through many types of businesses will significantly enhance this area.

This Strategic Direction is broad and should also be clearly linked to Strategic Direction 2 (outdoor sporting and recreation facilities).

ACTIONS

The following actions will underpin more diverse visitor activity and experiences through showcasing the strong natural environment and delivering new opportunities for the region over the next ten years and beyond.

Celebrate the Traditional stories

The Wadawurrung Country Plan 2020-2030 sets out that it:

“it is our collective dream and direction for the future of our people and Country. It tells the story of what is important to us, and what we need to do about it. It will be a guide for building upon our Cultural heritage management work and progressing our broader Caring for Country aspirations.”

Understanding the vision and the values of this Plan will be important for both the community and visitors to share in the learnings of the Traditional Owners. By 2023, the Wadawurrung Traditional Owners have established two additional partnerships for incorporating Cultural experiences into existing education or information centres (p.63, point 2 Country Plan).

4.1 Develop a Cultural tourism program with the Wadawurrung Traditional Owners that will:

- Share the stories of the key places in the region leading to increased awareness outcomes and linking to the Wadawurrung Healthy Country Plan.
- Educate through a range of platforms including signage, wayfinding, art-work and embrace digital platforms to appeal to diverse visitor markets.

4.2 Alignment with strategic documents

- Support activation of the You Yangs Masterplan and the key objectives, in particular:
 - Protect and enhance the inherent natural and Cultural values of the precinct

- Improve visitor experience and satisfaction
- Support the local and broader region visitor economy.

4.3 Feature the outdoor/natural environment in varying ways appealing to diverse target markets

- Create outdoor curated food and wine experiences in unique natural settings.
- Create safe, easy and diverse outdoor nature experiences catering for multi-cultural groups/international visitors/young families not seeking remote adventure.
- Using the unique environment, create inclusive and recovery-based health and wellness products.
- Create a training and educational base for coaches, outdoor education options etc.

4.4 Experiential accommodation

- Provide diverse experiential accommodation options drawing on nature such as glamping through to accommodation that celebrates outdoor eating and bathing options.
- Fast-tracking and facilitation for the planning and construction of accommodation-based proposals where necessary.

Engage and immerse in nature

4.5 Create more contemporary and appealing ways to engage and immerse in nature

(This includes links across sport and recreation for the commercialisation of activities to increase spend)

- Develop operator support programs for commercialising nature-based tourism across areas of passion (e.g., walking, cycling, sailing).
- Create immersive and engaging (not just passive viewing) nature-based tourism options such as rail trails, citizen science, kayak trails, outdoor swim and plunge areas, bird watching trails as an example.
- Create broader outdoor activities, celebrating the open space options of the region, such as a range of mini events and other activities that specifically address seasonality and mid-week aspects. This could include yoga/mediation, art classes, health and wellness and ensure flexible spaces can facilitate these.
- Encourage outdoor eating and experiential food and beverage options in nature, this includes bush tucker opportunities facilitated through the Wadawurrung Traditional Owners.
- Create more family friendly and inclusive parks, playgrounds and waterways that engage with the natural environment.

Habitat monitoring

Increasingly visitors want to not just have a rich and memorable holiday but also want to feel good about their impact and know their visit has helped the location. While this is true economically and socially, it is a particularly strong environmental-focussed trend.

Providing a diverse suite of ways to engage visitors in how to help the environment, minimising negative impacts and contributing to positive needs can better link locals and visitors and help add more contemporary and appealing elements to a wide range of existing products and experiences across all sub regions. Raising awareness and understanding is an initial step.

4.6 Giving back

Increase the ability of visitors to engage in flora and fauna monitoring. This also helps expand visitor and local appreciation of the multiple wetland reserves, including Ramsar sites through the region and broaden activities and visitation patterns from a beach and national park focus. Activities include:

- Link local programs with existing not-for-profit organisations and agencies including connection with the Atlas of Living Australia to ensure long term links between visitor inputs and scientists and decision makers. This also enables visitors to see the value of their inputs over time.
- Utilise similar groups to help train community volunteers to undertake habitat monitoring and provide local input into how visitor contributions can be best managed.
- Assist tourism operators to build citizen science options into their products (via local guides and visitors).
- Encourage visitor engagement post trip through providing digital options to stay engaged and continue to contribute and connect with the area.



WHY NATURE BASED TOURISM?

From a sustainability of tourism perspective, this Strategic Direction will deliver benefit:

- Through growth and diversification of target markets making the region's outdoors a major reason for visiting and building on a growing global and national trend.
- From leveraging other major projects such as growth in liveability outdoor space, walking and cycle pathways and sport and recreation links.
- By actively working to minimise negative environmental visitor impacts and maximise positive outcomes.
- By supporting and respecting the sharing of stories and knowledge from the Wadawurrung Traditional Owners to better engage understand their rich heritage and knowledge.
- By building a stronger family friendly focus, growing and extending spend and stay of an existing market.

From a regional / community perspective, this will drive:

- The 'giving back' concept and products enhancing positive outcomes for the environment and socially from tourism.
- Supporting Wadawurrung Traditional Owners to establish partnerships for incorporating Cultural experiences solely or in collaboration.

FUTURE MARKETS TARGETED?

The Priority Visitor Market Guide identified six aspirational personas; this Strategic Direction is expected to capture the following:

Wellness
Travellers

Gourmet
Travellers

Active
Enthusiasts

Cultural
Enthusiasts

Conference
Travellers

Lifelong
Learners



For a full breakdown of the six aspirational personas, please refer to the *Priority Visitor Market Guide*.

> 05 EXCEL IN INNOVATION AND DESIGN FOCUSED ON SUSTAINABILITY

OBJECTIVE

For the visitor, this region will become a place that helps create a positive view of the future, is creative, innovative, changing and stirs discussion and debates.

About this Strategic Direction

This Strategic Direction showcases the leadership the region takes around innovation and design and links it with sustainability. While leveraging the Revitalising Central Geelong project and bringing the stories of the past and the City of Design designation to the forefront for visitors, this Strategic Direction focusses on the future.

The UNESCO designation aims to make creativity an essential driver for sustainable urban renewal and development. Tourism more actively drives and supports this and partnering with the major local educational institutions and corporate businesses maximises this. The local tourism sector can spark thinking, imagination, and engage visitors and community in a changing suite of large and small sustainability projects in a very positive forward-facing way.

While this Strategic Direction addresses core community concerns around visitor impact from waste and recycling issues as an example, it should not be restricted to environmental sustainability. Rather it is also planned to link and showcase Cultural, heritage and the arts creating strong social outcomes.

Substantial progress is feasible in this region across raising awareness and respect, valuing Traditional Owners heritage and knowledge and growing the capacity of businesses in tourism. Caring for Country aspects in the Nature Based Strategic Direction will leverage this approach.

This is about embedding a theme across all parts of the region and all types of tourism and hospitality. All businesses and Government actions can link and activate this in quite different ways, resulting in Geelong and The Bellarine region being recognised for leadership and innovation.

Every visitor engages or has their imagination sparked in some way by this Strategic Direction, creating a lasting memorable positive association with the region.

ACTIONS

Recycling for local preservation

Australians use 130kg of plastic per person each year with less than 12% of this recycled, and furthermore, up to 130,000 tonnes of plastic finds its way into waterways and into the ocean (*source: WWF Australia*). Tourism and in particular peak summer periods can see an increase of 20-25% in the amount of plastic that makes its way to our waterways.

Geelong and The Bellarine is not immune to the issues arising from single use plastic consumption.

5.1 Encourage recycling for the region

- Collaborate with Wadawurrung Traditional Owners for Caring for Country messages and awareness.
- Create localised collection stations in key areas for both the community and visitors to use.
- Use citizen science and community interest in:
 - Designing initiatives and programs to identify opportunities for the repurposing of plastics. For example, create artwork, signage, uniforms, clothing as examples.
 - Create economic advantages from the innovations of recycling plastic into marketable products.

Contemporary sustainability

5.2 Work with the local industry to build the reputation and delivery of more contemporary sustainability through tourism

- Work with operators to see how the UNESCO City of Design designation can be leveraged by existing and new businesses as well as future

investment projects.

- Link culture and arts to design with rolling events.
- Encourage a social enterprise approach that creates local support for social issues including areas like homelessness, youth employment and support for the disadvantaged.
- Build the resilience and strength of the community through improved volunteer management that grows tourism (art, Cultural and sporting events benefit) but also wider areas like natural disaster and school support.
- Create focus areas aligned to the sub regions to feature – agricultural design (wool industry, farming practices), local food producers and cafes and restaurants featuring circular economy, wineries, sporting events, facilities, event management.
- Engage broad local partners to strengthen a “buy local”, and circular economy, particularly around food and wine. Engage visitors in solutions, such as buying plants that use restaurant’s compost, or art or outdoor seating from local plastic recycling. Showcase experiential options such as:

5.3 Build leading partnerships

- Link with educational institutions to trial, develop and showcase local solutions. Explore options where Deakin University has existing capabilities. Look to create competitions engaging locals and visitors to be able to vote. Key to this will be showcasing the connection to visitors. This could include:
 - IT (innovative use of fibres)
 - Architecture students designing public seating in line with the local brand
 - Sustainable solutions for local issues from engineering.
- Work to see children’s playgrounds, public space all incorporate sustainability in appealing, engaging ways. Include options that draw on all five senses increasing inclusivity and active involvement of visitors (such as marine debris pickup and deposit into public art).
- Work with Wadawurrung Traditional Owners to integrate and respect and highlight traditional skills and knowledge in sustainability solutions for the future.
- Look at existing environmental programs and social partnerships to better engage tourism operators and visitors to support re-use and recycling. Examples include Island Guardians, no plastic bag drives, marine clean-up programs, social enterprises around workforce and social partnerships such as Common Ground.
- Encourage multi partner collaborations including with existing not-for-profits to feature various ‘giving back’ options including citizen science.

5.4 Re-position the region to feature sustainability as a core element of all work to safeguard open spaces and natural resources

- Use the Tourism Australia Responsible Tourism survey and community inputs to determine local issues, meaningful indicators and priority areas.
- Ensure systems can be aggregated, be useful at sub regional and regional level. Ideally use globally accepted standards to certify/accredit to avoid greenwashing claims, use evidence and data to drive continuous improvement and better decision making.
- Develop a framework to ensure future planning of visitors facilities and activities safeguards open spaces and natural resources.
- Develop a program to help operators tell their story more authentically and appropriately to grow the appeal of their business and link to wider marketing needs.
- Collectively review opportunities around business and destination sustainable scorecards / certifications at various levels.
- Link with smart city technology and digitisation to showcase and feature innovation, including virtual reality interpretation, smart wayfinding, visitor information servicing that is practical and easy. These initiatives should leverage the actions outlined in the Smart City Strategic Framework document.



GREATER THAN BEING STUCK ON A ZOOM CALL



WHY SUSTAINABILITY THROUGH INNOVATION AND DESIGN?

From a sustainability of tourism perspective, this Strategic Direction will deliver benefit:

- By delivering product based on major trends globally and domestically.
- Creating a more distinctive point of difference that the region and each sub region can work with – around design, innovation, new technology, piloting new approaches.
- Through building a circular economy around food, beverage and hospitality.
- Creating greater diversity in visitor experiences, build an active nightlife growing overnight stays and year-round visitation particularly in winter.
- Leveraging low carbon options in transport and creates capacity to have strong market positioning with good train access, walking, cycling and overall creating a healthy environment.
- Through positioning better with trade and supply chain requirements for responsible travel.
- Strengthen the workforce base and also the volunteer base the tourism sector relies on.

From a regional / community perspective, this will drive:

- Community, industry and Government expectations around improved sustainability, including linking to larger scale outcomes like climate change and low carbon.
- Increases to liveability and indirect and direct outcomes for the local community.
- Social sustainability and can support a wide range of programs from youth employment, targeted charities and local issues through to supporting Reconciliation goals.

FUTURE MARKETS TARGETED?

The Priority Visitor Market Guide identified six aspirational personas; this Strategic Direction is expected to capture the following:

Wellness Travellers

Gourmet Travellers

Active Enthusiasts

Cultural Enthusiasts

Conference Travellers

Lifelong Learners



For a full breakdown of the six aspirational personas, please refer to the *Priority Visitor Market Guide*.

IMPLEMENTATION



IMPLEMENTING THE ACTIONS

The following tables indicate whether each of the actions identified across the Five Strategic Directions, will fall under a Deliver, Partner or Advocate platform, as explained below, and the indicative timing for each.

The outcomes of the implementation plan are an indication and are not based on financial analysis including feasibility testing which would be the next stage following the endorsement of the Sustainable Destination Master Plan.

Platform

Deliver



Projects that Tourism Greater Geelong and The Bellarine would manage and deliver directly.

Partner



Projects that Tourism Greater Geelong and The Bellarine will deliver in conjunction with local and state agencies, land-owners, community groups, Wadawurrung Traditional Owners and other relevant stakeholders

Advocate






Private land that can be optimised to deliver public benefit and further precinct activation.

Timeframe

Short term	0-3 years	
Medium term	3-5 years	
Long term	5-10 years	

ACTIONS AND IMPLEMENTATION

No.	Action	 Deliver	 Partner	 Advocate
1. Advance Liveability				
1.1	Support the objectives of Strategic Framework Plans		●	●
1.2	Enhance Geelong Waterfront			●
1.3	Create a strong nighttime economy			●
1.4	Encourage and support outdoor activities			●
1.5	Support new markets through investment activity	●		●
1.6	Encourage greater flexible space options		●	●
1.7	Investigate better connectivity between locals and visitors		●	●
1.8	Create a walkable, highly connected central city			●
1.9	Encourage an improved range of accommodation options			●
1.10	Support improved wayfinding across the city			●
1.11	Support affordable housing options			●

2. Ignite Sport, Recreation and Wellness				
2.1	Grow the sphere of influence of sports pursuits			●
2.2	Use icon events to build year-round visitation		●	
2.3	Enhance key sporting infrastructure			●
2.4	Grow the range of other sporting facilities			●
2.5	Grow the health and wellness (both physical and mental) appeal			●
2.6	Review the market capacity and opportunity for mineral bathing			●
2.7	Ensure accommodation meets different requirements			●
2.8	Leverage the landscape further			●
2.9	Create allied health opportunities		●	

Note: GCC refers to Geelong City Council

Timeframe

○ **Short term** 0-3 years

◐ **Medium term** 3-5 years

● **Long term** 5-10 years




Stakeholders¹

Timing

Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Precinct	Short Term
Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia	Short Term
Tourism Greater Geelong & The Bellarine, Geelong City Council, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, volunteer groups, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, developers	Medium/Long Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, affordable accommodation providers	Short Term/Long Term

Tourism Greater Geelong & The Bellarine, local event organisers, schools, local business	Short Term
Tourism Greater Geelong & The Bellarine, sub regional councils, sporting event organisers, arts/culture stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Trust	Short/Medium/Long Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Medium/Long Term
Tourism Greater Geelong & The Bellarine, key stakeholders, developers	Medium/Long Term
Tourism Greater Geelong & The Bellarine, hydrogeologist, sub regional councils	Short/Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils, key developers	Short/Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils	Short/Medium Term
Tourism Greater Geelong & The Bellarine, local businesses, universities, health providers	Short/Medium Term

ACTIONS AND IMPLEMENTATION

No.	Action	 Deliver	 Partner	 Advocate
3. Transform Access and Network Connections				
3.1	Build visitor precincts around Avalon and Spirit of Tasmania to maximise spend and encourage overnight stays			●
3.2	Capture cruise ship visitors to the region			●
3.3	Create contemporary travel options			●
3.4	Re-visit transport needs as tourism grows to make sure transport can service the region			●
3.5	Align transport outcomes with the G21 Transport Strategy			●
3.6	Marketing the connectivity	●		

4. Unlock Nature Based Tourism				
4.1	Develop a program with Wadawurrung Traditional Owners to grow engagement			●
4.2	Alignment with strategic documents			●
4.3	Feature the outdoor/ natural environment in many ways appealing to various target markets			●
4.4	Experiential accommodation			●
4.5	Engage and immerse in nature		●	●
4.6	Giving back through increasing the ability of visitors to engage in flora and fauna monitoring			●

5. Excel in Innovation & Design Focused on Sustainability				
5.1	Encourage recycling for the region		●	●
5.2	Work with the local industry to build the reputation and delivery of more contemporary sustainability through tourism		●	●
5.3	Build leading partnerships		●	●
5.4	Re-position the region to feature sustainable development principles as a core element of all work to safeguard open spaces and natural resources.	●	●	

Timeframe

🕒 **Short term** 0-3 years

🕒 **Medium term** 3-5 years

🕒 **Long term** 5-10 years

Stakeholders¹

Timing

Tourism Greater Geelong & The Bellarine, Avalon Airport, Geelong Port, Spirit of Tasmania, City of Greater Geelong, State Government, G21

Short to Long Term

Tourism Greater Geelong & The Bellarine, State Government authorities

Medium Term

Tourism Greater Geelong & The Bellarine, sub regional councils

Short Term

Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Department of Transport

Medium to Long Term

Tourism Greater Geelong & The Bellarine, G21

Medium to Long Term

Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia

Short Term

Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners

Short Term

Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional Councils

Medium Term

Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders

Short to Medium Term

Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders

Short to Medium Term

Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies,

Short Term

Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies, universities

Short Term

Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies

Short Term

Tourism Greater Geelong & The Bellarine, local businesses, sub regional councils

Short Term

Tourism Greater Geelong & The Bellarine, sub regional councils, key stakeholders, universities, TAFE, private colleges

Short to Medium Term

Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies, Visit Victoria, Tourism Australia

Short to Long Term

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

The data and information that informs and supports our opinions, estimates, surveys, forecasts, projections, conclusion, judgments, assumptions and recommendations contained in this report (Report Content) are predominantly generated over long periods, and is reflective of the circumstances applying in the past. Significant economic, health and other local and world events can, however, take a period of time for the market to absorb and to be reflected in such data and information. In many instances a change in market thinking and actual market conditions as at the date of this report may not be reflected in the data and information used to support the Report Content.

The recent international outbreak of the Novel Coronavirus (COVID-19), which the World Health Organisation declared a global health emergency in January 2020 and pandemic on 11 March 2020, has and continues to cause considerable business uncertainty which in turn materially impacts market conditions and the Australian and world economies more broadly.

The uncertainty has and is continuing to impact the Australian real estate market and business operations. The full extent of the impact on the real estate market and more broadly on the Australian economy and how long that impact will last is not known and it is not possible to accurately and definitively predict. Some business sectors, such as the retail, hotel and tourism sectors, have reported material impacts on trading performance. For example, Shopping Centre operators are reporting material reductions in foot traffic numbers, particularly in centres that ordinarily experience a high proportion of international visitors.

The data and information that informs and supports the Report Content is current as at the date of this report and (unless otherwise specifically stated in the Report) does not necessarily reflect the full impact of the COVID-19 Outbreak on the Australian economy, the asset(s) and any associated business operations to which the report relates. It is not possible to ascertain with certainty at this time how the market and the Australian economy more broadly will respond to this unprecedented event and the various programs and initiatives governments have adopted in attempting to address its impact. It is possible that the market conditions applying to the asset(s) and any associated business operations to which the report relates and the business sector to which they belong has been, and may be further, materially impacted by the COVID-19 Outbreak within a short space of time and that it will have a longer lasting impact than we have assumed. Clearly, the COVID-19 Outbreak is an important risk factor you must carefully consider when relying on the report and the Report Content.

Where we have sought to address the impact of the COVID-19 Outbreak in the Report, we have had to make estimates, assumptions, conclusions and judgements that (unless otherwise specifically stated in the Report) are not directly supported by available and reliable data and information. Any Report Content addressing the impact of the COVID-19 Outbreak on the asset(s) and any associated business operations to which the report relates or the Australian economy more broadly is (unless otherwise specifically stated in the Report) unsupported by specific and reliable data and information and must not be relied on.

To the maximum extent permitted by law, Urbis (its officers, employees and agents) expressly disclaim all liability and responsibility, whether direct or indirect, to any person (including the Instructing Party) in respect of any loss suffered or incurred as a result of the COVID-19 Outbreak materially impacting the Report Content, but only to the extent that such impact is not reflected in the data and information used to support the Report Content.



This report is dated **December 2022** (with updates made in October 2023) and incorporates information and events up to that date only and excludes any information arising, or event occurring, after that date which may affect the validity of Urbis Pty Ltd's (Urbis) opinion in this report. Urbis prepared this report on the instructions, and for the benefit only, of **Tourism Greater Geelong and The Bellarine** (Instructing Party) for the purpose of a Destination Development Plan (Purpose) and not for any other purpose or use. Urbis expressly disclaims any liability to the Instructing Party who relies or purports to rely on this report for any purpose other than the Purpose and to any party other than the Instructing Party who relies or purports to rely on this report for any purpose whatsoever (including the Purpose).

In preparing this report, Urbis was required to make judgements which may be affected by unforeseen future events including wars, civil unrest, economic disruption, financial market disruption, business cycles, industrial disputes, labour difficulties, political action and changes of government or law, the likelihood and effects of which are not capable of precise assessment.

All surveys, forecasts, projections and recommendations contained in or made in relation to or associated with this report are made in good faith and on the basis of information supplied to Urbis at the date of this report. Achievement of the projections and budgets set out in this report will depend, among other things, on the actions of others over which Urbis has no control.

Urbis has made all reasonable inquiries that it believes is necessary in preparing this report but it cannot be certain that all information material to the preparation of this report has been provided to it as there may be information that is not publicly available at the time of its inquiry.

In preparing this report, Urbis may rely on or refer to documents in a language other than English which Urbis will procure the translation of into English. Urbis is not responsible for the accuracy or completeness of such translations and to the extent that the inaccurate or incomplete translation of any document results in any statement or opinion made in this report being inaccurate or incomplete, Urbis expressly disclaims any liability for that inaccuracy or incompleteness.

This report has been prepared with due care and diligence by Urbis and the statements and opinions given by Urbis in this report are given in good faith and in the belief on reasonable grounds that such statements and opinions are correct and not misleading bearing in mind the necessary limitations noted in the previous paragraphs. Further, no responsibility is accepted by Urbis or any of its officers or employees for any errors, including errors in data which is either supplied by the Instructing Party, supplied by a third party to Urbis, or which Urbis is required to estimate, or omissions howsoever arising in the preparation of this report, provided that this will not absolve Urbis from liability arising from an opinion expressed recklessly or in bad faith.

The population forecasts and Residential Development Forecast (estate outlines) in this report have been sourced in their entirety or in part from .id (informed decisions) www.id.com.au. .id and its licensors are the sole and exclusive owners of all the rights, titles and interest subsisting in the part of the report where .id or other content providers are identified. Some of the .id sourced content is a derivative of ABS Data, which data can be accessed from the website of the Australian Bureau of Statistics at www.abs.gov.au and licensed on terms published on the ABS website.

Urbis staff responsible for this report were:

Director	Nisha Rawal, Claire Ellis, Nat Anson
Associate Director	Kylie Newcombe
Consultant	Sean Hennessy, Ryan Bondfield
Analyst	Viren Sood, Sabina Krslovic
Graphic Designer	Kelwin Wong
Project code	P0039327
Report number	Final

