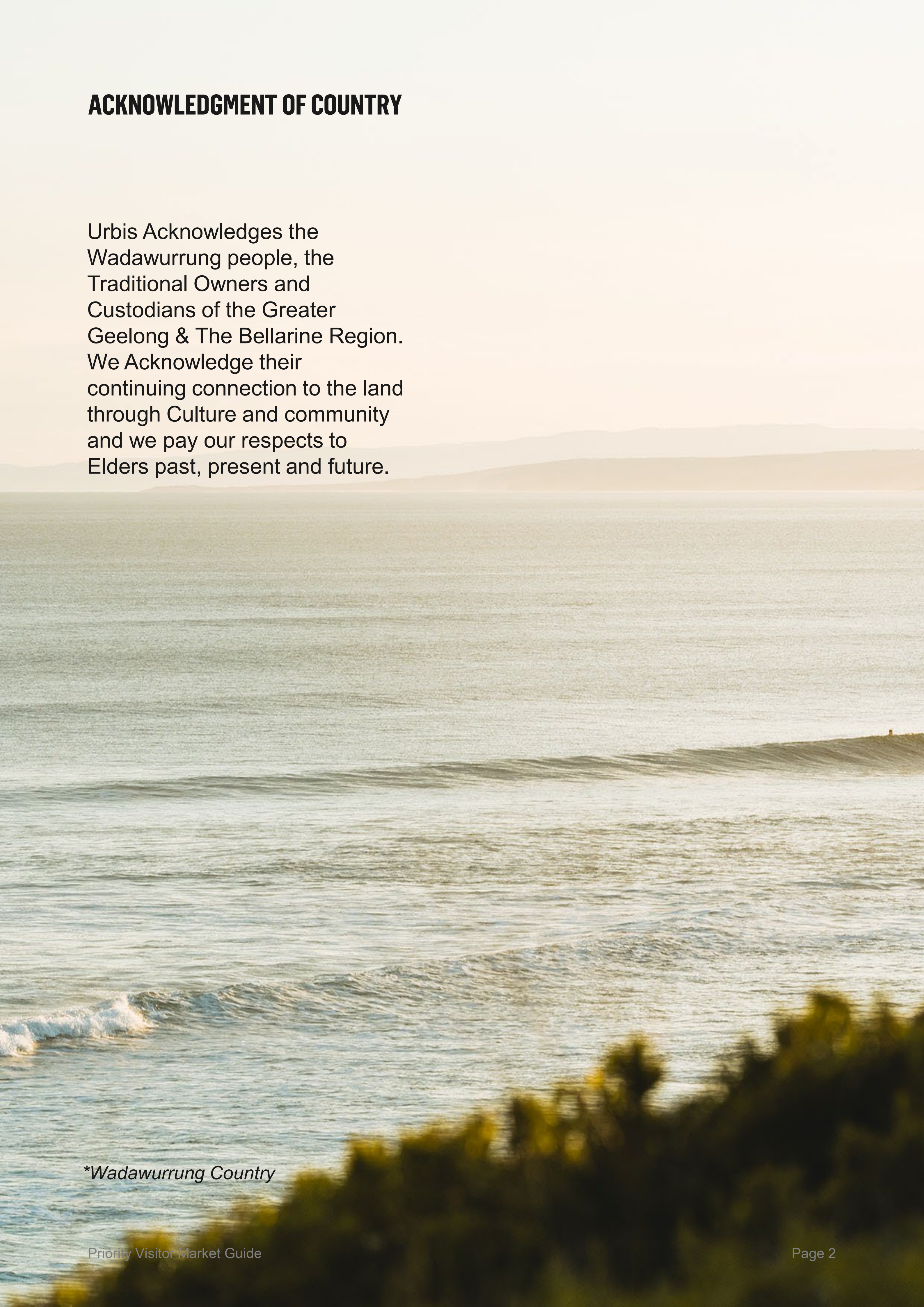
PRIORITY VISITOR MARKET GUIDE

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

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

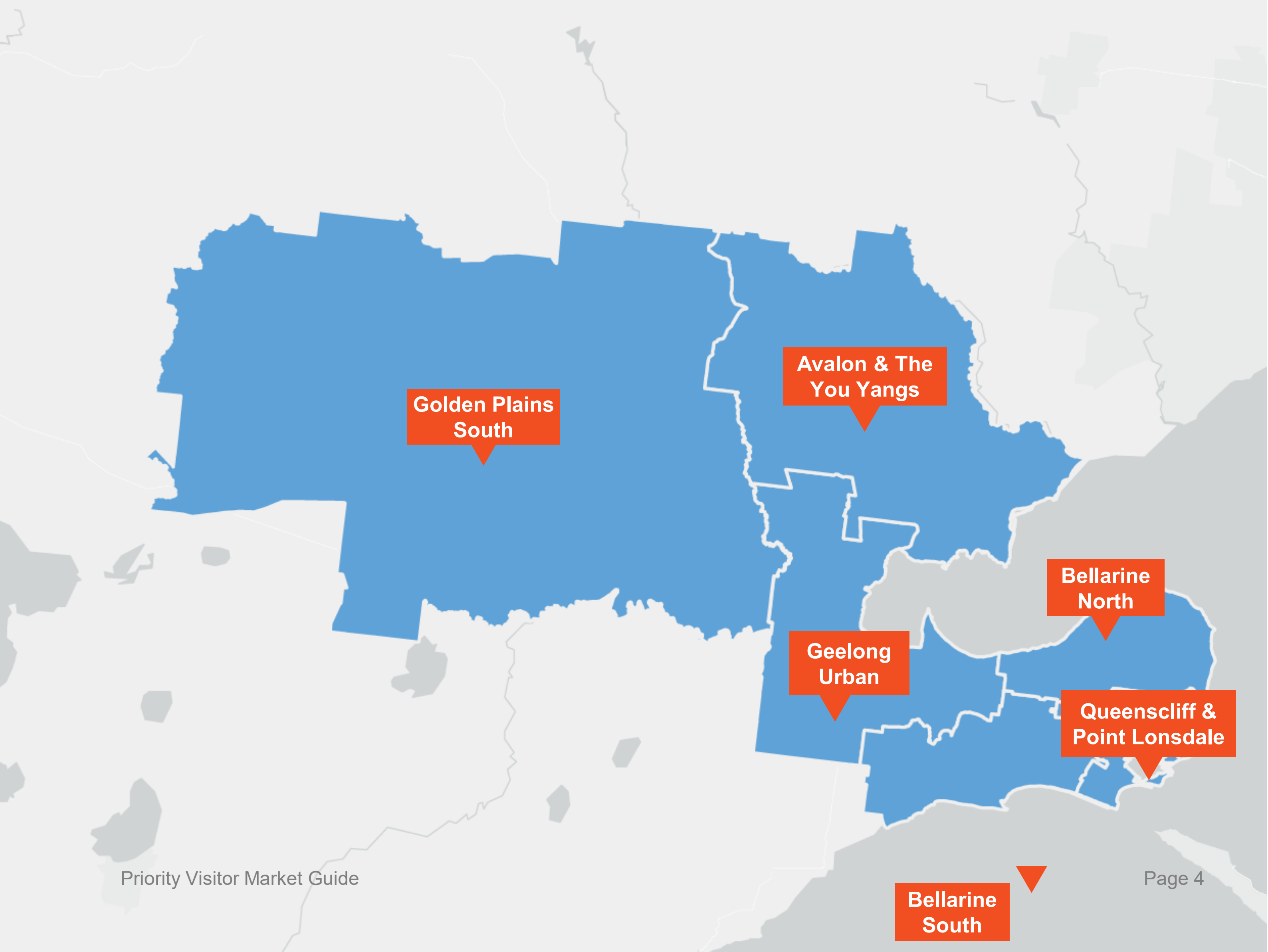
THE SUSTAINABLE DESTINATION MASTER PLAN

The **Sustainable Destination Master Plan** has been informed through a comprehensive approach which draws together findings across three reports, 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.

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).



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 VISITOR MARKET

The Priority Visitor Market Guide 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 delivering a more diverse visitor market that sees mid-week, year-round visitation and mitigates the impacts of seasonality. Ultimately, the region will need to deliver the right experiences and products and engage with businesses and the community to support the growth of both the existing key visitor markets, while capturing new and emerging markets that represent opportunities for the region. While the broader Sustainable Destination Master Plan will address a number of these Sustainable Development Goals, the Priority Visitor Market Guide will seek to ensure Good Health and Well-Being, Responsible Consumption and Production, and Climate Action are addressed across the region and in visitor activity.

3 GOOD HEALTH AND WELL-BEING

TARGETS ADVANCED

- Promote programs and products that positively impact the health and wellbeing of citizens
- Reduction in preventative deaths from road traffic
- Strengthen the capacity of all countries for risk reduction and management of national and global health risks, including mental health

11 SUSTAINABLE CITIES AND COMMUNITIES

TARGETS ADVANCED

- Enhance inclusive and sustainable urbanisation and capacity for participation
- Strengthen efforts to protect and safeguard cultural and natural heritage
- Reduce the per capita environmental impact of cities
- Accessibility to open, green and public spaces
- Support positive economic, social and environmental links between urban, peri-urban and rural areas by strengthening national and regional development planning

12 RESPONSIBLE CONSUMPTION AND PRODUCTION

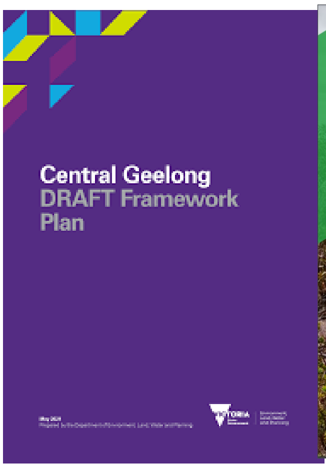
TARGETS ADVANCED

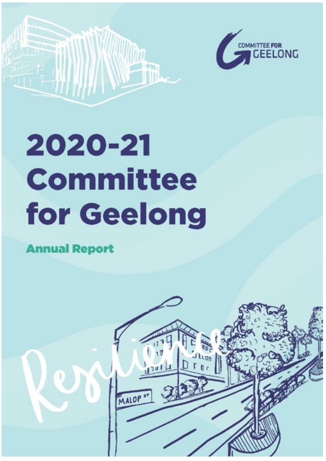
- Monitor and improve sustainable tourism practices
- Promote the creation of tourism products that have no or minimal impacts on local environments and cultures
- Sustainable management and efficient use of natural resources
- Move towards more sustainable patterns of consumption and production

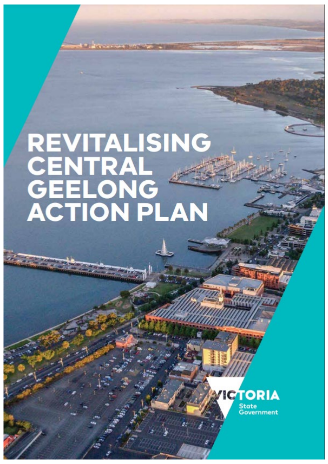
REFERENCE MATERIAL

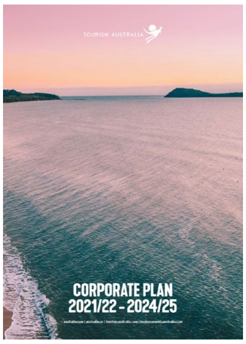
\In preparing the Priority Visitor Market Guide, we have had regard to a range of reference documents, including:

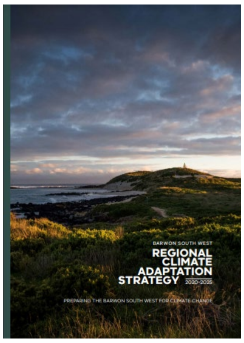
- Central Geelong Framework Plan (Draft) 2021
- Central Geelong Revitalisation Action Plan 2016/17
- Port of Geelong, Port Development strategy 2018
- You Yangs Precinct Master Plan, June 2021
- Tourism Australia Corporate Plan 2021/22 – 2024/25
- CGG Council Plan 2018-22
- TGGB Action Plan 2022-2023
- 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

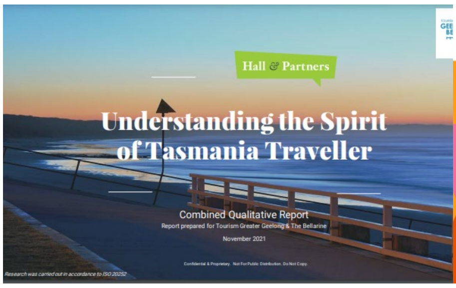












EXECUTIVE SUMMARY

PRIORITY VISITOR MARKET GUIDE

Successful tourism regions are sustained by drawing a diverse range of visitors throughout the year.

Greater Geelong and The Bellarine Peninsula –the environments, Culture and identity –already possess the building blocks for a sustainable, resilient and valued visitor economy. It is a matter of cultivating these destination assets and creating an ecosystem for their long-term growth and success where the greatest opportunity lies for future visitation. By getting the best from these destination assets, in turn means the region can draw greater diversity in its visitor market.

Tourism has an important role to play in the recovery of national economies post-COVID. For Geelong and The Bellarine, the tourism industry delivered 5.3% of gross regional product and 7.2% of employment in the 2019-20 financial year. Promoting the growth of this industry post-COVID will therefore have a far-reaching impact.

The purpose of the Priority Visitor Market Guide seeks to set out a future direction for key visitor markets that the region should be capturing based on the current and emerging destination assets and infrastructure in the region. In this report we review the types of visitors already active in the region, and those "aspirational" visitors the region should seek to capture in the future. This report sits alongside the **Destination Development Plan**, as it speaks to the strategic pillars that can be enacted to ensure the aspirational visitor groups are captured in the future, and result in growth in visitor activity in the region.

There should be no "off season" when it comes to visitor flows.

6.4M
visitors in CY 2019

60%
Of TGGB HMD[1] Visits were in Geelong Urban

87%
Of HMD[1] Visits from Intrastate Visitors

3%
Of HMD[1] Visits from International Visitors

19%
Of HMD[1] visits from Melbourne's West

10%
Of HMD[1] Visits from Interstate Visitors

Bellarine South receives
21%
Of TRA[2] Intrastate Visitor Nights

62%
Overnight domestic visitors that stay in private accommodation

Most day trips are to Geelong Urban at
68%

1. *Human Movement Data (mobile phone mobility data)*
2. *Tourism Research Australia data*

Source: Tourism Research Australia, Near (Human Movement Data)

WHERE WILL GEELONG AND THE BELLARINE BE IN TEN YEARS TIME?

Geelong and The Bellarine will aspire to be a destination for millions of additional visitors with spin-off benefits to all in the region.

The analysis of expected tourism flows alongside assumptions on the flow-on effects of targeted investment has projected that there will be 12.8 to 14.0 million visit days in the Tourism Region by 2032. These visitors are likely to spend between $1.9 and $2.1 billion in total, which will be a large addition to the local economy.

In order to ensure these benefits are felt in the local community, there will need to be a targeted investment in accommodation and other infrastructure to support growth. It is expected that growth in visitor demand will see a need for over 2,000 additional **commercial accommodation room**s by 2032. Whilst some of this will be met by the existing pipeline of supply, certain regions and typology of supply will need to be bolstered.

Equally there must be ample supply to withstand the peaks created by major events. Growth in visitor numbers also requires being able to attract new or emerging markets are becoming more prevalent inside and outside of the region.

Personas such as cultural enthusiasts, conference travellers, lifelong learners, wellness travellers, gourmet travellers and active enthusiasts are not currently being well-serviced by the tourism offers of the region.

Strategies and actions that both nurture the positive, existing personas whilst expanding the reach to the targeted personas will go a long way to establishing Geelong and The Bellarine as a destination.

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.

TOURISM GLOBAL TRENDS AND IMPLICATIONS FOR GEELONG AND THE BELLARINE

The tourism opportunities for Geelong and The Bellarine will be shaped by global trends as well as local and national dynamics.

Global tourism trends that have relevance to how future visitors, products and experiences in the region should be considered are outlined.

Sustainably minded travellers are consciously weighing up destination options

Sustainability is a growing concern for travellers, 63% of travellers surveyed by Booking.com indicated they would avoid popular tourist destinations to ensure they are not contributing to overcrowding and redirect travel to less frequently visited destinations.

The United Nations World Tourism Organisation (UNWTO) advises that sustainable tourism should make optimal use of environmental resources that are key in tourism development, respect socio-cultural authenticity of host communities while conserving their built and living Cultural heritage and values.

Implications and Opportunity

Celebrate the natural assets and demonstrate sustainable growth management policies. Leverage the congestion free nature of the region in comparison to competitors.

Travellers are craving more local and authentic experiences

In a 2017 Airbnb survey, unique accommodation interiors and atmosphere, interactions with hosts, and interactions with local Culture were seen as important to Airbnb users (Paulauskaite, et al, 2017).

In Australia 65% of Australians were searching for authentic Cultural experiences when holidaying within the country (Booking.com 2021).

This sentiment was echoed in early engagement surveys with local tourism operators in Geelong and The Bellarine, with suggestions to offer unique packaged experiences.

Implications and Opportunity

Bespoke accommodation and experiences that capture the unique place attributes.

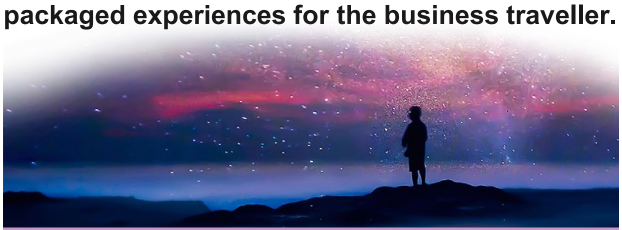
Changing work patterns are driving changes when and where work is done

The COVID-19 pandemic disrupted off site business related travel. While it is recovering, there are long term changes on where business is done.

The rise of the 'digital nomad' who could work from anywhere with Wi-Fi access gave rise to a new trend – 'bleisure'. Workers could combine business and leisure while basing themselves at a location for an extended stay. The other aspect of the 'bleisure' trend is the business traveller who extends their stay in a location to explore once finished with work commitments.

Implications and Opportunity

Create suitable long stay accommodation and packaged experiences for the business traveller.



First Nations experiences are increasingly sought out

Travellers in Australia are continuing to actively seek out First Nations tourism experiences, with Asian tourists driving the segment's popularity. Between 2013 and 2019, the number of Indigenous seeking tourism visitors increased by an average of 9% per annum, with the associated spend increasing by 8% per annum (Department of Foreign Affairs and Trade, 2019).

Effectively integrating First Nations tourism into an overall offering has proven highly effective globally, with New Zealand reporting over 50% of its 3.7 million overseas tourists visiting a Māori tourism experience in 2017, up from 361,000 visitors in 2008 (New Zealand Government).

Implications and Opportunity

The stories and Culture of the First Nations people is a significant tourism asset.

There is growing demand for personal development and wellness retreats

Wellness tourism has grown considerably in recent years. According to the Wellness Tourism Industry Statistics 2021, the global wellness tourism market is predicted to reach $919 billion by 2027.

The industry is considered highly lucrative in Australia and continues to grow in demand.

The Global Wellness Institute defines wellness tourism as "travel associated with the pursuit of maintaining or enhancing one's personal wellbeing". The growth in demand for this offering is therefore motivated by a desire for personal development, touching on issues such as healthy living, lifestyle change and connecting with authentic experiences.

Implications and Opportunity

Consider wellness in a holistic way beyond spas and retreats. Wellness should be embedded in a range of experiences.

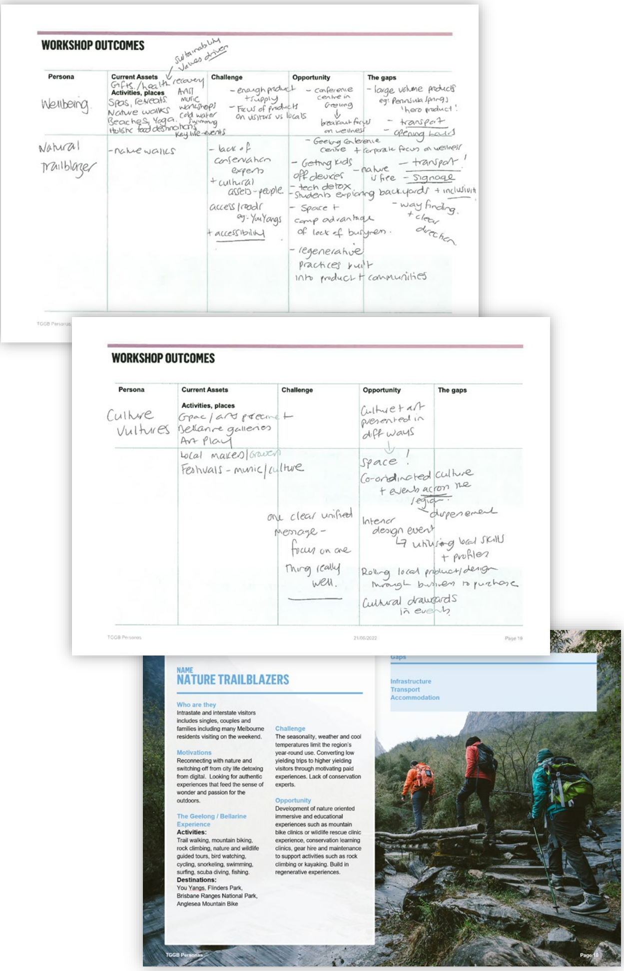
THE PERSONA WORKSHOP WITH INDUSTRY

Urbis facilitated a workshop with industry members for the purpose of testing the personas for credibility, relevance and legitimacy. This was a key touch point to ensure that the experience and aspirations from tourism's front-line businesses are captured, and the personas are grounded in reality.

An overview of the persona development process was followed by working group break out sessions, each tasked with identifying gaps and challenging our assumptions.

We also took the opportunity to introduce the Strategic Directions that are the foundation of the **Destination Development Plan**.

The workshop was held on Wednesday 22nd July 2022 at Deakin Waterfront Campus, with the adjacent attendees.



TOURISM GREATER GEELONG & THE BELLARINE

THE SHARP GROUP
WINE | CIDER | HOSPITALITY

CLYDE PARK
BANNOCKBURN

MUSTANG & Co

geelong arts centre

BIG4 HOLIDAY PARKS

KARDINIA PARK STADIUM TRUST

PORTARLINGTON GRAND HOTEL

Lon Retreat & Spa

SEA ALL DOLPHIN SWIMS QUEENSCLIFF

SEAROAD FERRIES
QUEENSCLIFF – SORRENTO

ANTHER

WHAT WE HEARD IN THE PERSONA WORKSHOP

For sport we need to become known not just for the event but building out to clinics, elite camps etc.

Develop parklands to create interesting spaces for wellness

Our main competitive advantage is space and lack of busy-ness

The bottom end of the accommodation market still represents the region

Increase the length of stay through education and infrastructure

We need collaboration with like minded operators across the region

Don't silo sport, create broader experiences from sports events

Through our focus on makers and growers we need to have a tangible connection to place and Indigenous plants

There could be conservation volunteers or citizen science opportunities

We need to have a very clear link around the Wadawurrung Traditional Owners

Merge the Geelong Convention and Exhibition Centre with the broader revitalisation and sports push

Eco tourism should be considered as conscious tourism

WHAT WE HEARD THROUGH THE ENGAGEMENT AND SURVEY

Our understanding of the challenges and equally the opportunities for tourism draw on the valuable inputs of the tourism industry gained through one-on-one tailored engagement discussions and an online survey.

Key themes from the conversations revealed:

- The region lacks an identity and unique proposition
- Market gaps with high value segments not represented
- Seasonal fluctuations undermine the sustainability of businesses
- Capacity constraints with current operations due to labour shortages
- Having natural asset drawcards and the costs associated with preserving them.

The ability to attract high value visitors is a shared industry aspiration. Investment in major projects including the Geelong Convention and Exhibition, Centre, Geelong Arts Centre and GMHBA Stadium / Kardinia Park upgrades will support this goal.

A survey provided industry with more opportunities for input and largely echoed the themes from the conversations. A total of 69 industry members across accommodation, food and beverage, Cultural venues, and tours participated in the survey. Survey participants identified festivals, events, recreation, sport, nature, art, Culture, business, food and dining as all being attractors.

The survey findings echo the challenges raised in the conversations. Key issues are:

- Attracting and retaining staff
- Fluctuations in visitors across the year
- Mounting cost pressures on businesses
- Shortage of accommodation for workers and visitors
- The regions offer and stories are now well known.

The survey identified the following as critical to future success. These initiatives would benefit the economy and their business including:

- Access to staff
- Developing a unique selling proposition
- A strategy to keep Spirit of Tasmania passengers in Geelong
- Selling the natural assets
- A cohesive approach to marketing food and wine.

GROWTH MARKET OPPORTUNITIES IDENTIFIED THROUGH ENGAGEMENT

The growth market opportunities have been identified as both existing markets that have growth potential such as recreation and sport, and segments where the associated infrastructure, product or marketing does not yet adequately support the potential. Art and Culture would be an example of the latter though not what the region is well known for.

Festivals and events
Industry would like to see more events co-ordinated across the sub regions.

Recreation and sport
Elevating and promoting activities and linking these with other services such as training clinics.

Business travel
Considered as important for attracting higher value visitors. Investment in event and accommodation will better support the opportunity in the future.

Art, culture and heritage
Already home to more facilities than most regional cities, new facilities will power its ability to attract events and visitors. Connect with Wadawurrung Traditional Owners for this important element of the positioning.

Health and wellness
Viewed as a global trend (is physical and mental) and has positive flow on benefits to other businesses.

Nature based travel
The natural beauty is viewed as an under-leveraged asset that could be better utilised to attract high value visitors.

Multi-mode access
New transport routes including the Spirit of Tasmania, future routes into Avalon Airport and potential new ferry services, create more access opportunities to the region.

High value
There is a broad aspiration to attract a higher yielding visitor to the region to counter the high numbers of low value visitors.

GEELONG & THE BELLARINE VISITOR PROFILE

The following section draws on Human Movement Data (i.e., mobile phone activity) and Tourism Research Australia data to profile the historical visitation to the Geelong and The Bellarine Tourism Region.

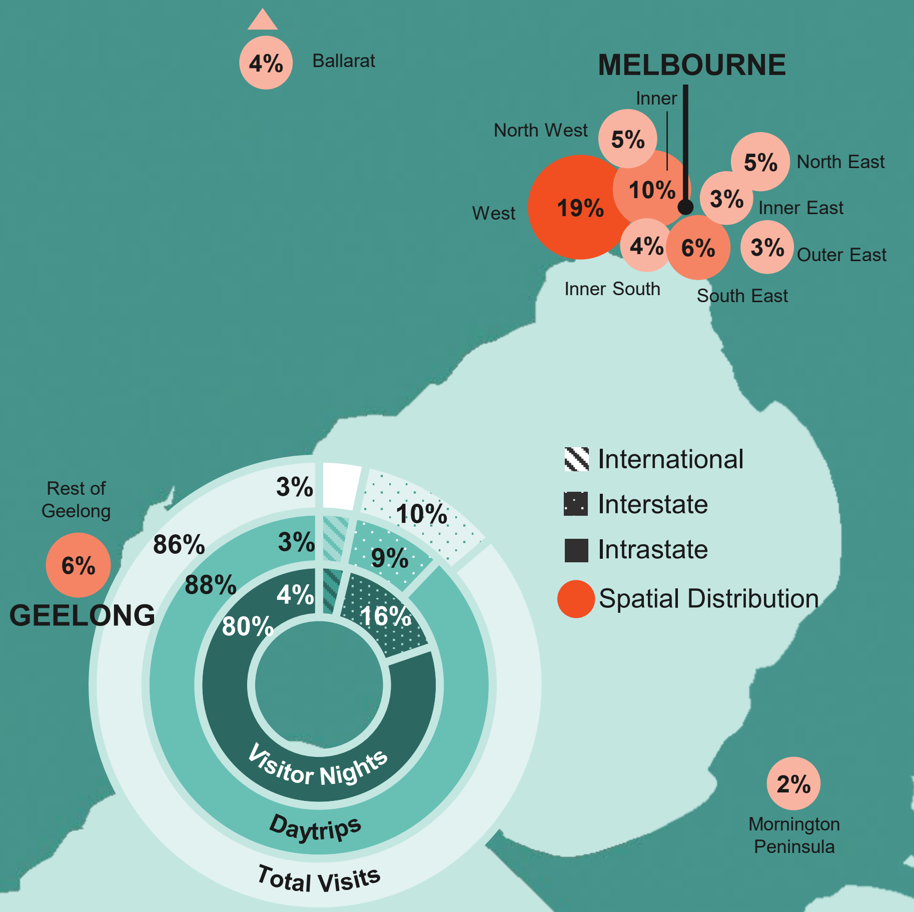
It will look towards the residential origin, headline purpose of visit, length of stay, intraregional movement and activities undertaken during their trip to infer an understanding on who is coming and why they have decided to come.

HUMAN MOVEMENT DATA

Human movement data (HMD) has been used to assess the movement patterns of different types of visitors across the region.

The sample has been split out to only include visitors, defined here as those who's common evening location is elsewhere in the state, the country or overseas. This is further filtered to exclude any devices that "ping" for longer than a month consecutively, to remove any devices that have recently moved into or out from the Geelong and The Bellarine.

Daytrips are defined by non-sequential visits to a sub region, whilst visitor nights are when devices are observed across sequential days.



Source: Near (2018 and 2019)

TOURISM RESEARCH AUSTRALIA DATA

Daytrips
3.98 Million
Ave. Daytrips
2017-19

Dom. Visitor Nights
3.76 Million
Ave. Visitor Nights
2017-19

Int. Visitor Nights
1.06 Million
Ave. Visitor Nights
2017-19

Source: Tourism Research Australia. Based on 3-year average 2017-19

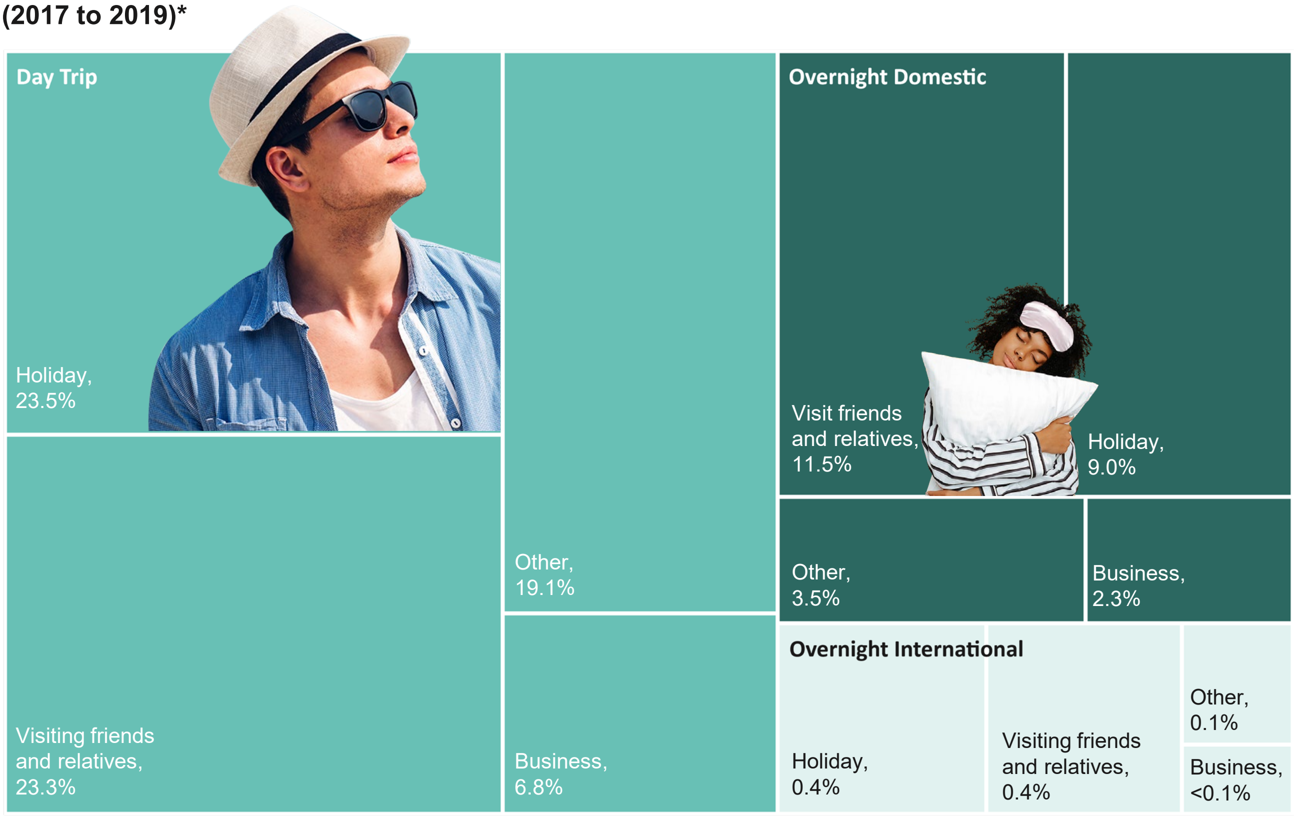
Tourism Research Australia data helps to understand the total visitor numbers by their origin, purpose of visit and the activities they undertake.

Visitation to Geelong and The Bellarine can be characterised as:

- Primarily of domestic origin - daytrips account for around 72% of all trips since 2016.
- Strong growth in visitor numbers was seen prior to COVID-19, averaging 10.6% per annum between 2016 and 2019.
- Visitor numbers decreased by nearly half of 2019's 6.4 million visitors in 2020, however 2021 saw a strong upturn in visitors, suggesting continued growth post-COVID.
- When considering the overnight visitor makeup by total visitor nights, travellers are primarily of domestic origin.
- In 2019, 74% of the 5.5 million visitor nights were by domestic overnight visitors. This suggests that domestic visitors are a core aspect of the region's market.
- Prior to COVID-19, around 60% of all visits were spent in Geelong Urban, this was particularly the case for international travellers, including international students.
- With significant population growth forecast for West Melbourne, the volume of daytrips is expected to continue to grow.

TOTAL REGION DEEP-DIVE - TRA

Average trip by type and reason (2017 to 2019)*



Source: Tourism Research Australia. Based on 3-year average 2017-19

Overall, the most popular reasons for travel amongst day-trippers, domestic overnight visitors and international visitors is for both a holiday and visiting friends and relatives. When considering travel from 2017 to 2019, these two reasons make up a considerable proportion of total visitors, with around 64% of day-trippers, 78% of domestic overnight visitors and 79% of international travellers visiting Geelong and The Bellarine for these reasons. While distinguished as two separate categories in the data, the attributes of those travelling for a holiday and to visit friends and relatives are consistent with one another. As survey respondents have listed visiting friends and relatives as an activity on their holiday to a significant degree, the make-up of both groups are similar.

Business trips are also a common reason for travel to Geelong and The Bellarine. 19% of TRA visits were daytrips for 'other' reasons which include shopping, medical and other personal appointments. For international trips, education and employment reasons were the most significant 'other' reasons.

For domestic travellers, short stays are the most frequent trips. Most visitors are only spending the day in Geelong and The Bellarine, while overnight trips are typically between 1 to 3 nights. The TRA data suggests that proportionally, Geelong's tourism makeup by time spent is stable. While COVID-19 did impact total visitor numbers, and the international visitor population, domestic tourist trends remained constant despite reduced numbers.

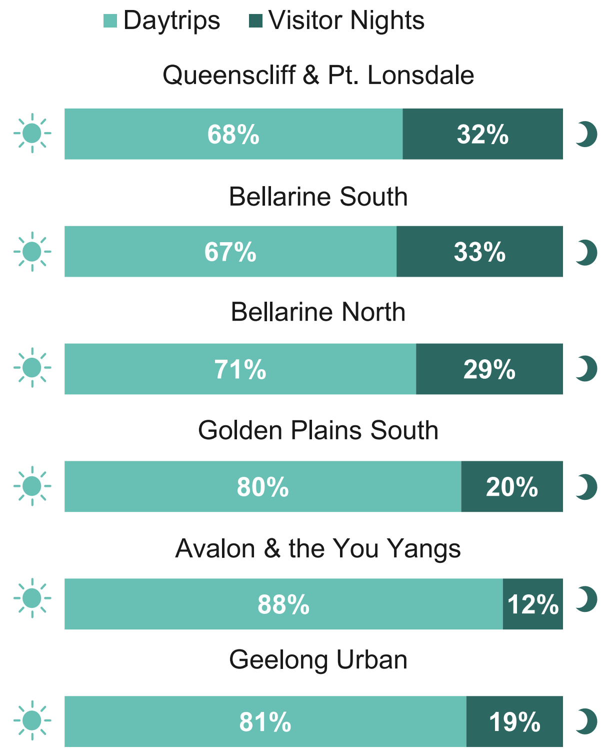
Time Spent by Domestic Visitors in Geelong and The Bellarine

	Day trip	1 night	2 nights	3 nights	4 nights+
Holiday	76%	7%	8%	4%	5%
Visiting Friends and Relatives	67%	14%	10%	5%	4%
Business	71%	15%	6%	1%	6%

Source: Tourism Research Australia. Based on 3-year average 2017-19

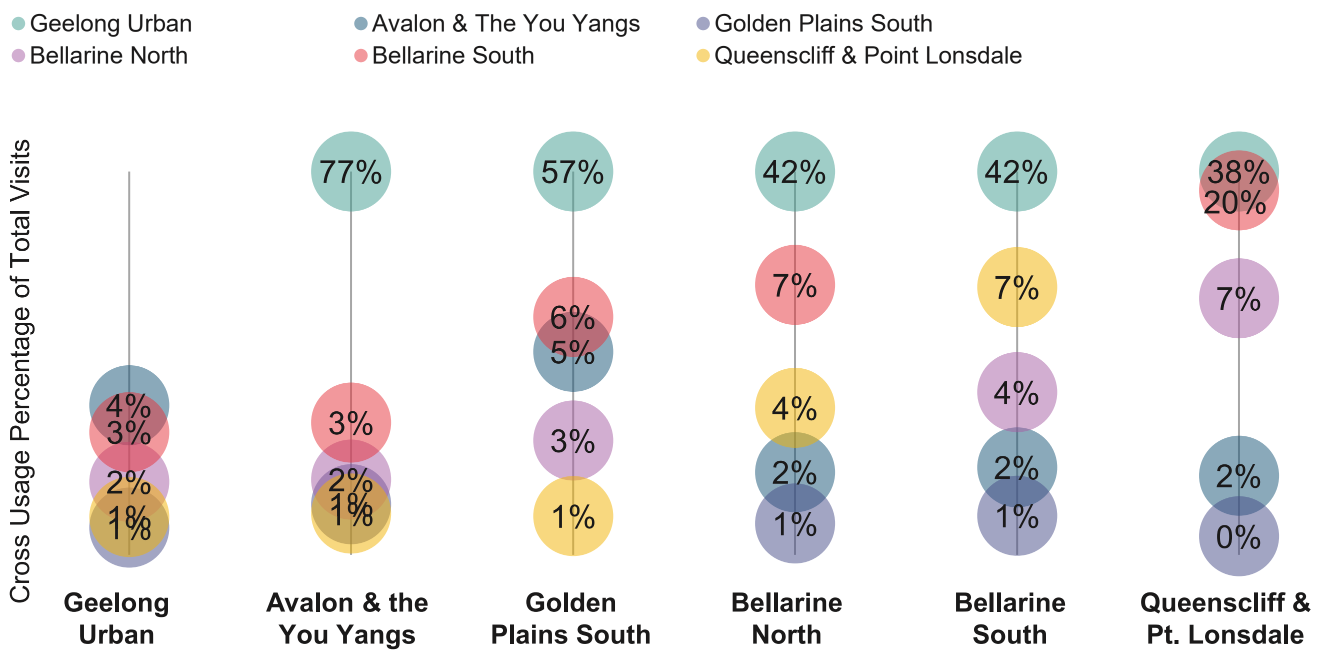
TOTAL REGION DEEP-DIVE - HMD

Split of Daytrips vs. Visitor Nights
2018 – 2019 Calendar Years



Source: Near (2018 and 2019)

Percent of Total Visits (x-axis) that Also Spent Time in Another Region (bubbles) on the Same Day
2018 – 2019 Calendar Years



Source: Near (2018 and 2019)

Within the Geelong and Bellarine Tourism Region there are spatial variations in trip typology and intraregional travel. Below highlights the proportion of daily visits by tourists that occurred across multiple sub regions relative to total daily visits to the sub region along the x-axis. For example, 77% of visits to the Avalon & The You Yangs also were observed in Geelong Urban on the same day.

Geelong Urban overall has the highest level of cross-usage with the other precincts, pointing to the importance of it as a central point of attraction, and as a first point of call transit hub. The three Bellarine Peninsula sub regions also have strong cross-usage between each other.

To the left we can see estimates of the spread of visitation by daytrips or overnight trips in each of the sub regions. The Bellarine Peninsula sub regions have a higher relative tendency for overnight trips. This points to the popularity of the regions for summer and weekend holidays due to proximity with the beach and other leisure activities such as golf courses and wineries. The balance are all greater than 80% daytrip visitation, a result of the activities typically undertaken in each with hikes and adjacent activities in Golden Plains South and the You Yangs, flights in and out from Avalon Airport, and arts, Cultural and nightlife activities, as well as Visiting Friends and Relatives, in Geelong Urban.

WHAT TYPES OF ACTIVITIES DO DIFFERENT

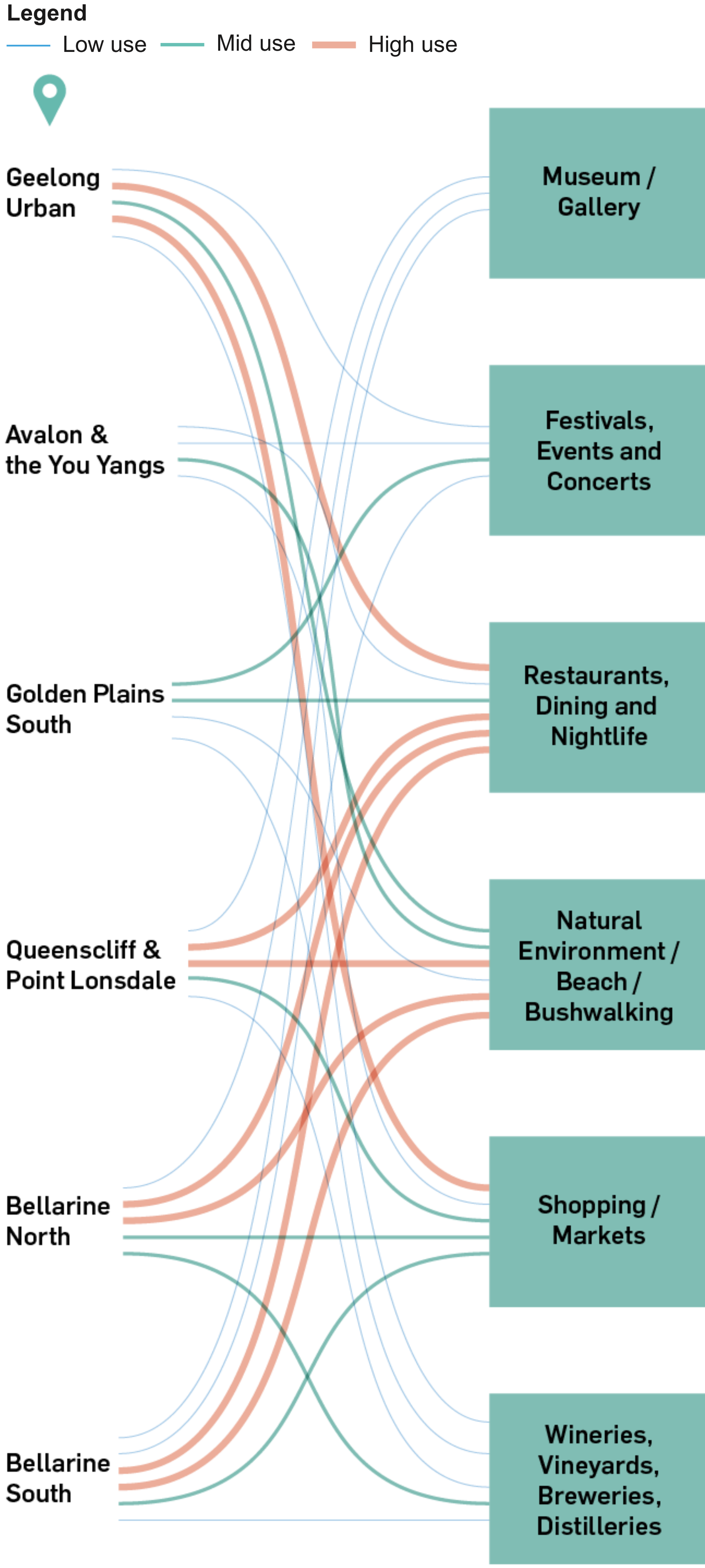
Leveraging the diversity of the sub regions' respective natural environments

Geelong and The Bellarine's sub regions are diverse in offerings, and with this comes diversity in popular activities categorised under the natural environment. Beaches are highly frequented in Queenscliff and Point Lonsdale, Bellarine North and Bellarine South, reflecting the regions' geography and location. On the other hand, as expected visitors to Avalon and the You Yangs favour visiting parks – driven by the You Yangs Regional Park. These differences in activities favoured across the sub regions are therefore reflective of the unique environment found in each of the regions.

Promoting what is already available within the region

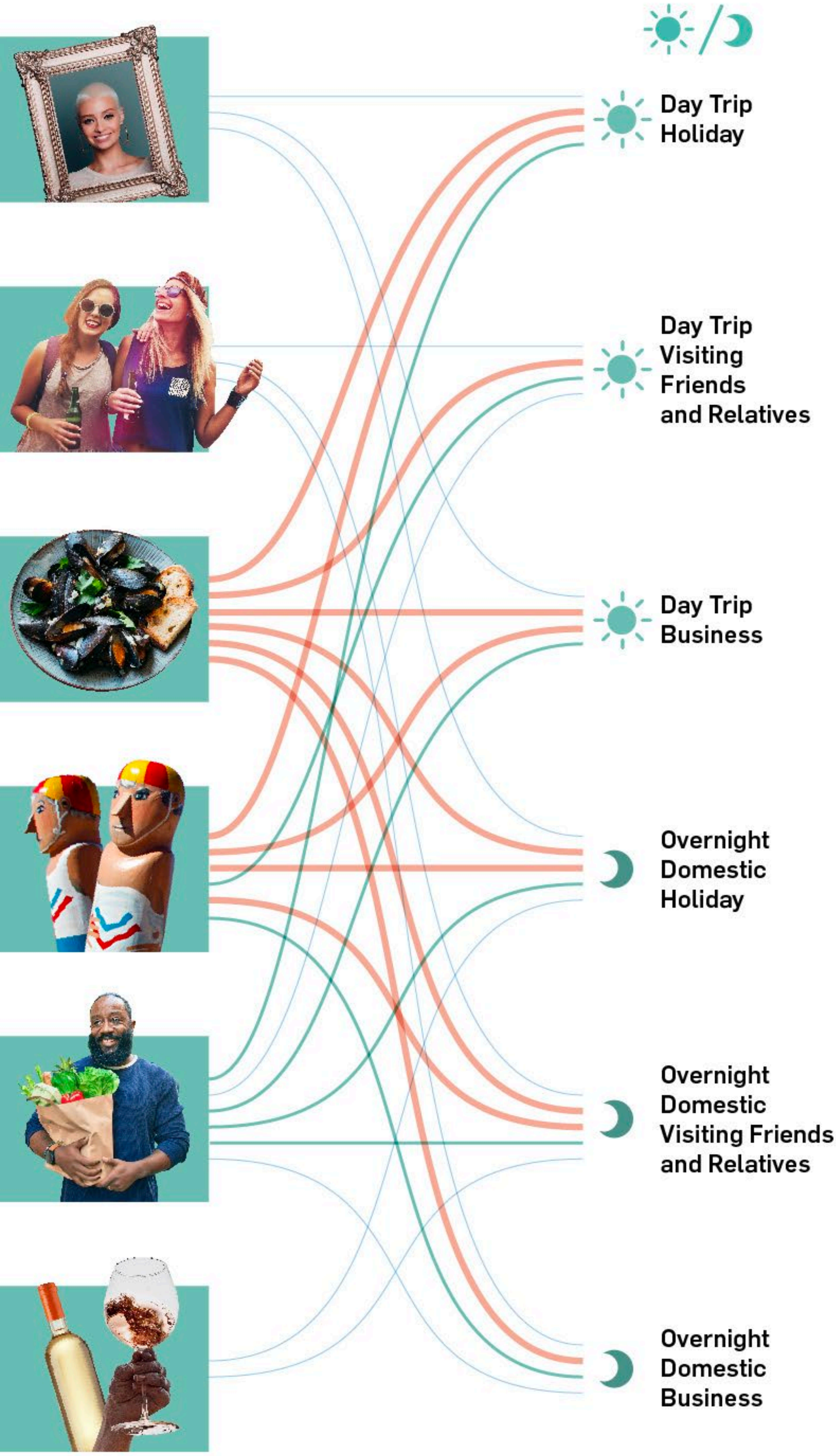
The TRA data suggests that festivals, events and concerts, as well as visiting wineries and vineyards are not popularly frequented compared to other activities when considering the sub regions of Geelong and The Bellarine, as well as its types of visitors. Despite this, the Tourism Sentiment Index (TSI) ranks festivals, events and concerts as the '#1 loved asset' in Geelong and The Bellarine for Q1 2022. The region is host to a wide range of events such as Pako Festa (multicultural street festival in Geelong), the Cadel Evans Great Ocean Road Race (annual bicycle race) and the Avalon International Air Show (showcase for aviation, aerospace, defence and space technologies).

The diagram does indicate degrees of growth and opportunity, for example events in Geelong Urban, and visitation to wineries, breweries and distilleries.



Source: Tourism Research Australia. Based on 3-year average 2017-19

VISITORS UNDERTAKE IN EACH SUB REGION?



The economic value of popular activities (or lack thereof)

When examining the activities that are popular by both visitor type and region, it is evident that many activities frequented by those in Geelong and The Bellarine do not generate revenue. For example, visiting the beach is amongst the most popular activities in all regions, between holiday visitors, those visiting friends and relatives and by some visiting on business. However, visiting the beach for a swim alone does not increase tourism revenue.

This extends to the broader category of the natural environment, where other activities such as bushwalking and visiting a public garden are also often non-revenue generating. Similarly, sightseeing is another popular activity frequented by visitors, however it is difficult to determine whether revenue is gained from this activity, and its economic value.

Considering the state of the workforce

Dining out is a highly frequented activity amongst all groups. It is highly important to maintain the strength of this industry despite issues in the hospitality and tourism workforce. In 2018-19 (pre COVID-19), cafes, restaurants and takeaway accounted for 14% of the region’s Gross Value Added (Tourism Research Australia). This indicates that dining out is central to the economic value of tourism in Geelong and The Bellarine.

GEELONG URBAN SUB REGION DEEP-DIVE

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 major Universities, as well as high Business and Visiting Friends and Family (VFR) travel, pointing to the large employment hubs and growing residential areas. It has the least orientation with holiday visits of all sub regions.

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	1,800k
Visiting Friends and Relatives	53%
Holiday	22%
Business	14%

International Visitor Nights	950k
Education	41%
Visiting Friends and Relatives	38%
Holiday	12%

Daytrips	687k
Holiday	41%
Visiting Friends and Relatives	35%
Business	11%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

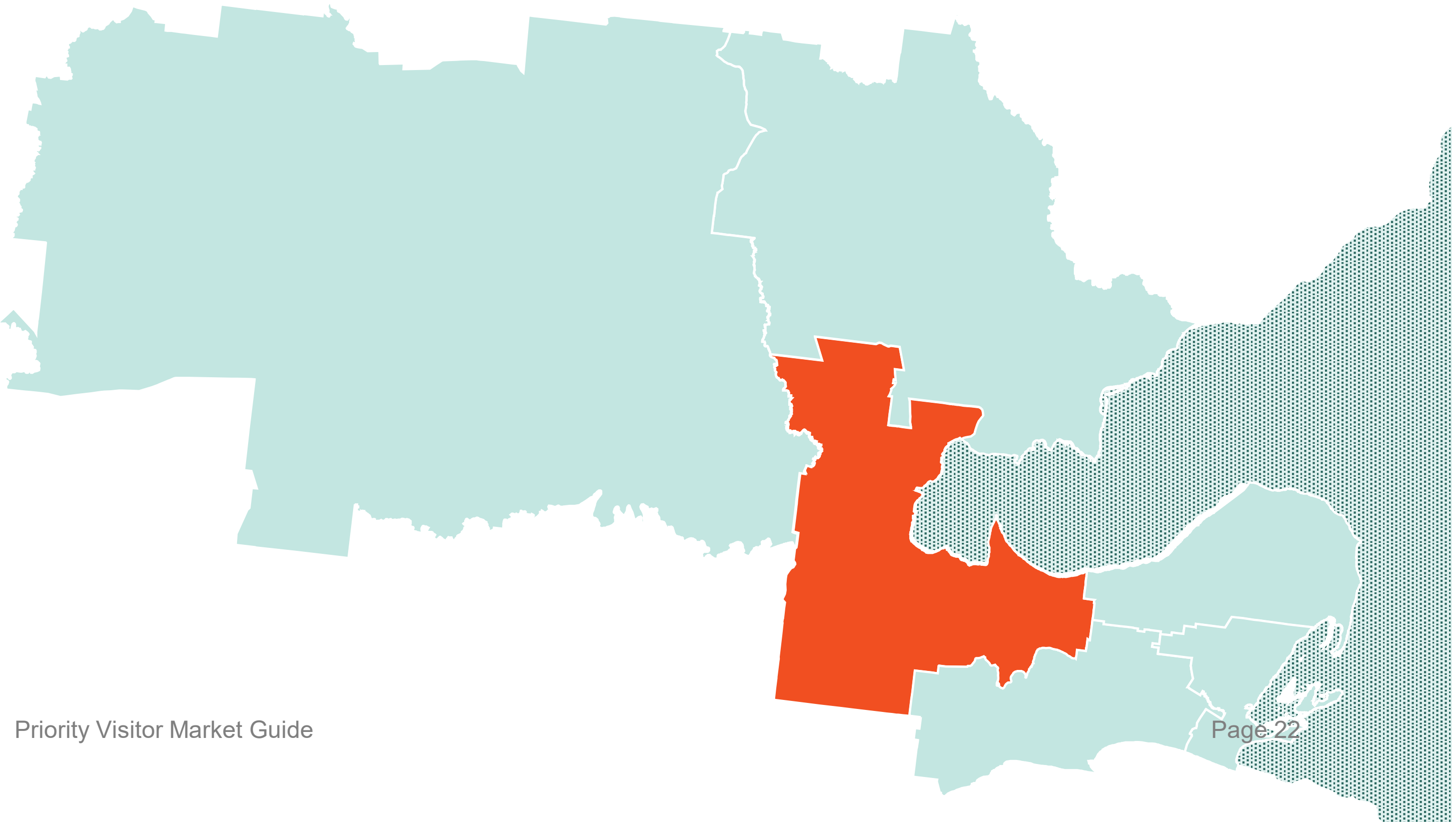
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
2,080	180	400

Source: STR, Urbis

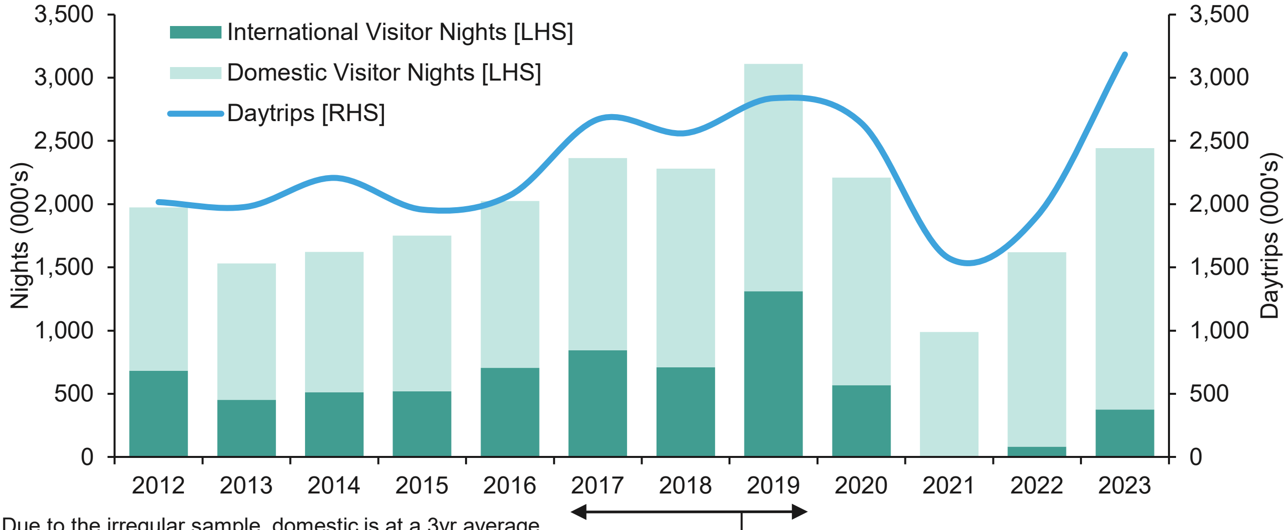
Regional Personas

- Insta Experiences
- Day-Blitzer
- Day-Blitzer (Cross-Cultural)
- Nomads

Detailed further on pages 24, 26 and 27

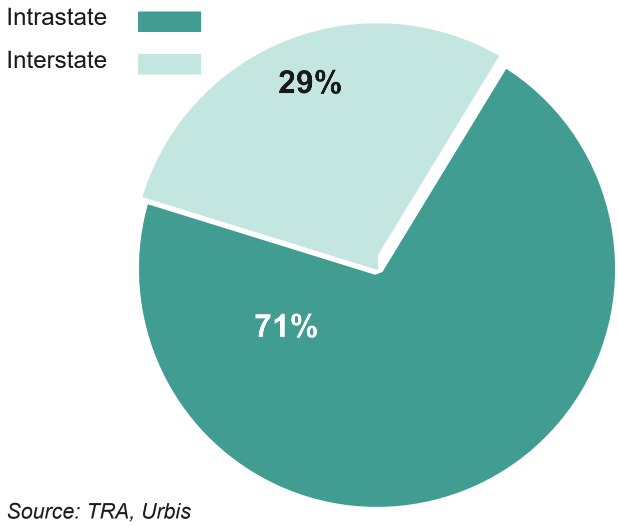


Historical International and Domestic Visitor Nights
2012 to 2023, Year to June



Due to the irregular sample, domestic is at a 3yr average
Source: TRA, Urbis

State of Origin
Domestic Visitor Nights 2017-19 Average



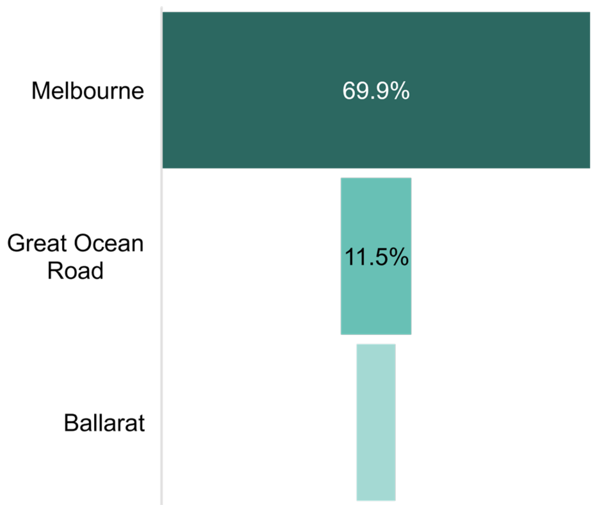
Source: TRA, Urbis

Geelong Urban has a gravity unmatched by the other sub regions. As the centre for business and the largest town in the tourism region, it receives a high share of interstate and international visitation. The city had particularly been attracting increasing interest from education and VFR travellers, linked to the related expansion of local tertiary education providers and the continued outward expansion of housing in Greater Geelong.

In line with the above, we are seeing most day-trippers coming from Melbourne (see below right). This will be a blend of workers, students and family relatives making the commute for their respective purpose.

As per the previous page, there are a variety of accommodation options to support the existing visitor base. The challenge for Geelong Urban will be improving the attractiveness for high-spending, holiday goers whilst maintaining a healthy occupancy level that provides spill-over accommodation.

Tourism Region of Origin
Daytrips 2017-19 Average



Source: TRA, Urbis

AVALON & THE YOU YANGS SUB REGION DEEP-DIVE

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.

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	51k
Visiting Friends and Relatives	70%
Holiday	11%
Business	11%

International Visitor Nights	14k
Visiting Friends and Relatives	63%
Education	17%
Holiday	12%

Daytrips	282k
Holiday	57%
Visiting Friends and Relatives	22%
Business	14%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

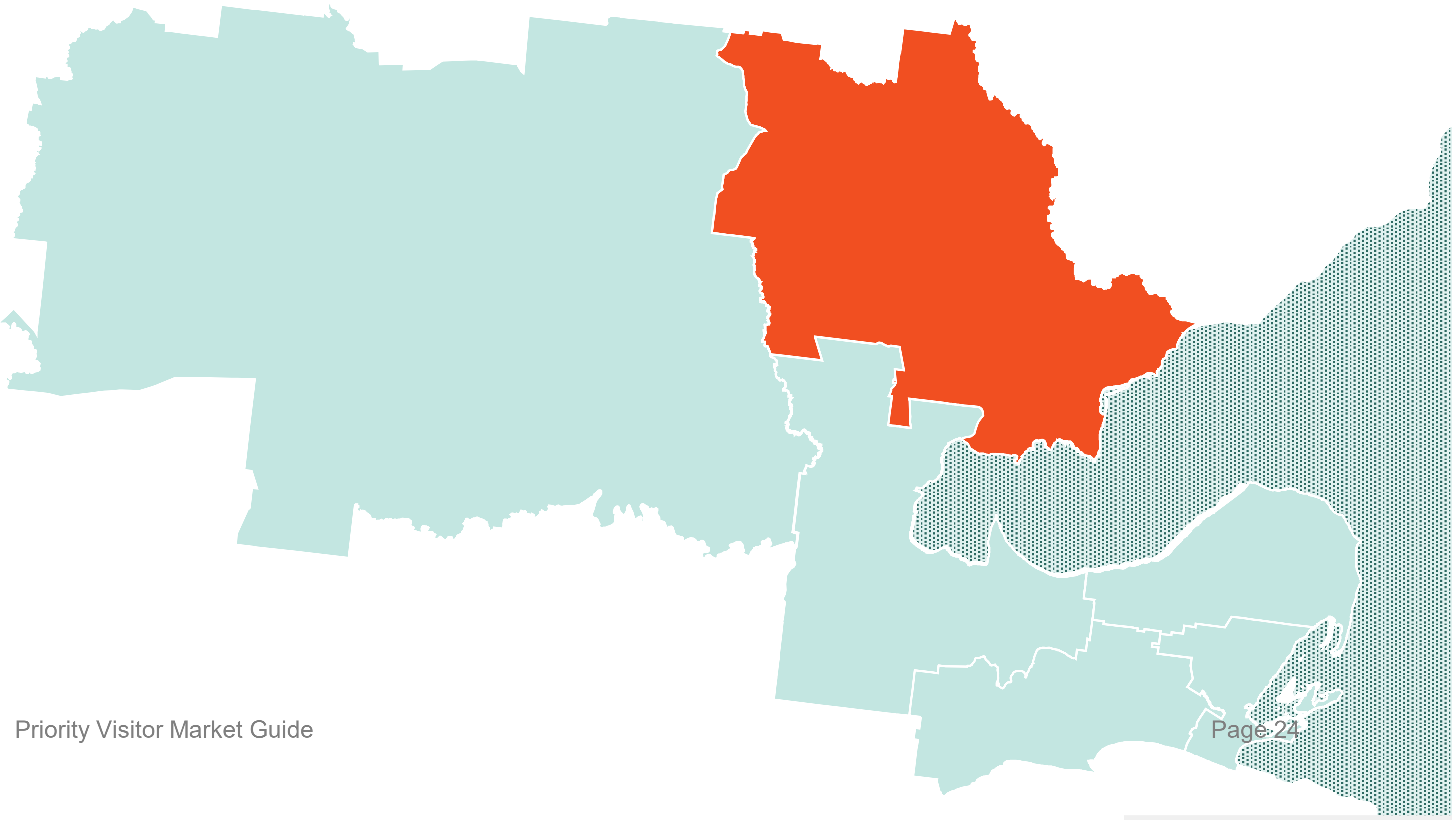
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
15	0	10

Source: STR, Urbis

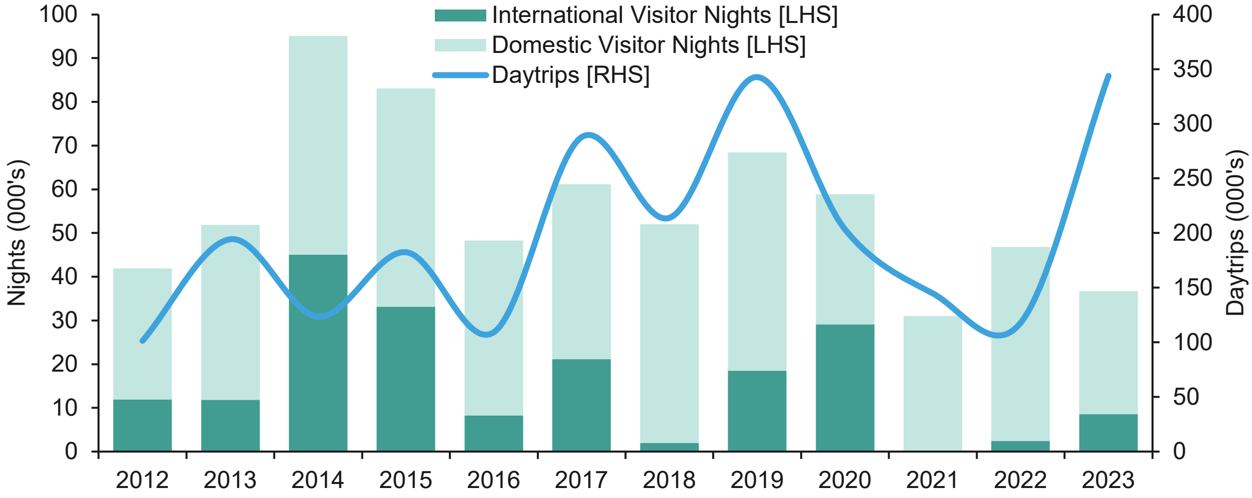
Regional Personas

- Nature Trailblazers
- Leisurely Explorers
- Day-Blitzer

Detail further on pages 55, 56 and 57

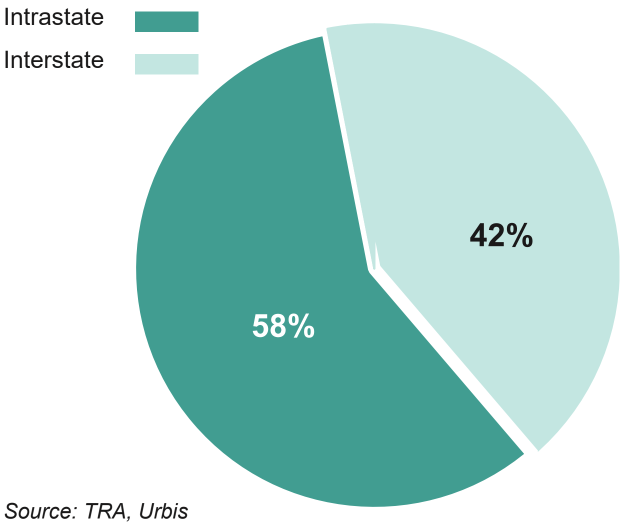


Historical International and Domestic Visitor Nights
2012 to 2023, Year to June



Due to the irregular sample, domestic is at a 3yr average until Covid-19
Source: TRA, Urbis

State of Origin
Domestic Visitor Nights 2017-19 Average



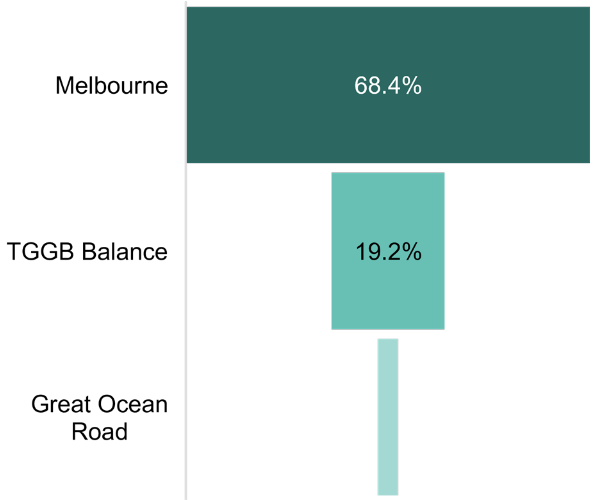
Source: TRA, Urbis

Overnight visitation to the sub region has historically been patchy, with no discernible upward or downwards trajectory. This ties in with the high reliance on the VFR cohort whom may be inconsistently visiting the residential areas in Lara.

There is a slight trend upwards however for daytrips pre-Covid. Many of these trips will be to the You Yangs Regional Park from Melbourne or the rest of the Geelong and The Bellarine region. The single point destination of these "Nature Trailblazers" returns limited broader economic benefit. Challenges will be around improving the spend of these visits to contribute to the upkeep and regeneration of the sub regional environment.

Avalon & The You Yangs has very few accommodation options, however many are visiting the You Yangs Regional Park and do not require commercial accommodation. This gap may be elevated slightly as a result. However, the presence of Avalon Airport and its potential to drive visitation to the broader region should not be understated. Growth in flights may need associated improvements to immediately surrounding accommodation options as well as to transport networks.

Tourism Region of Origin
Daytrips 2017-19 Average



Source: TRA, Urbis

GOLDEN PLAINS SOUTH SUB REGION DEEP-DIVE

Key destinations from the HMD 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.

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	135k
Visiting Friends and Relatives	47%
Holiday	47%
Business	6%

International Visitor Nights	5k
Holiday	45%
Visiting Friends and Relatives	38%
Business	17%

Daytrips	106k
Visiting Friends and Relatives	54%
Holiday	33%
Other Reason	11%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

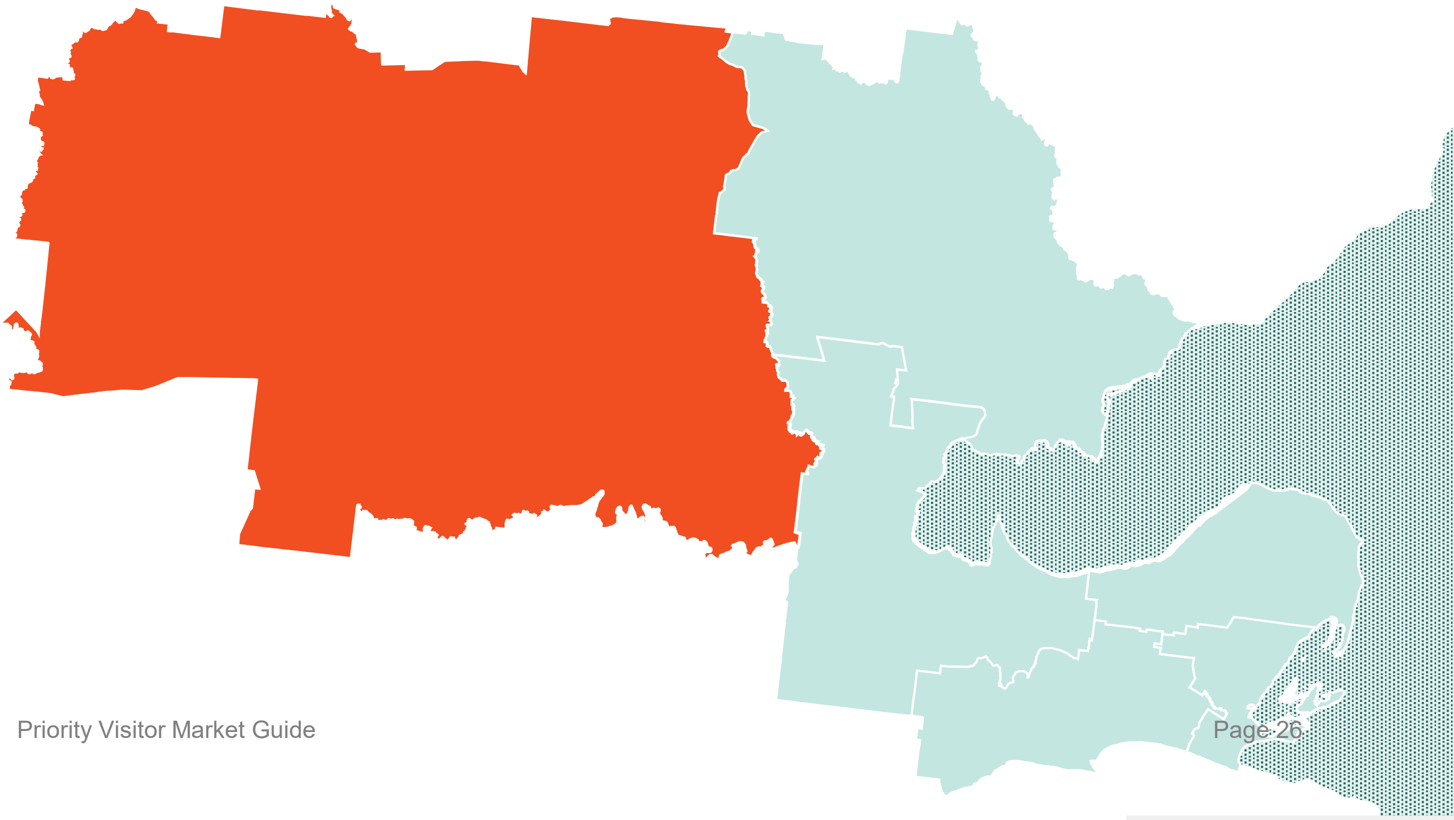
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
10	10	20

Source: STR, Urbis

Regional Personas

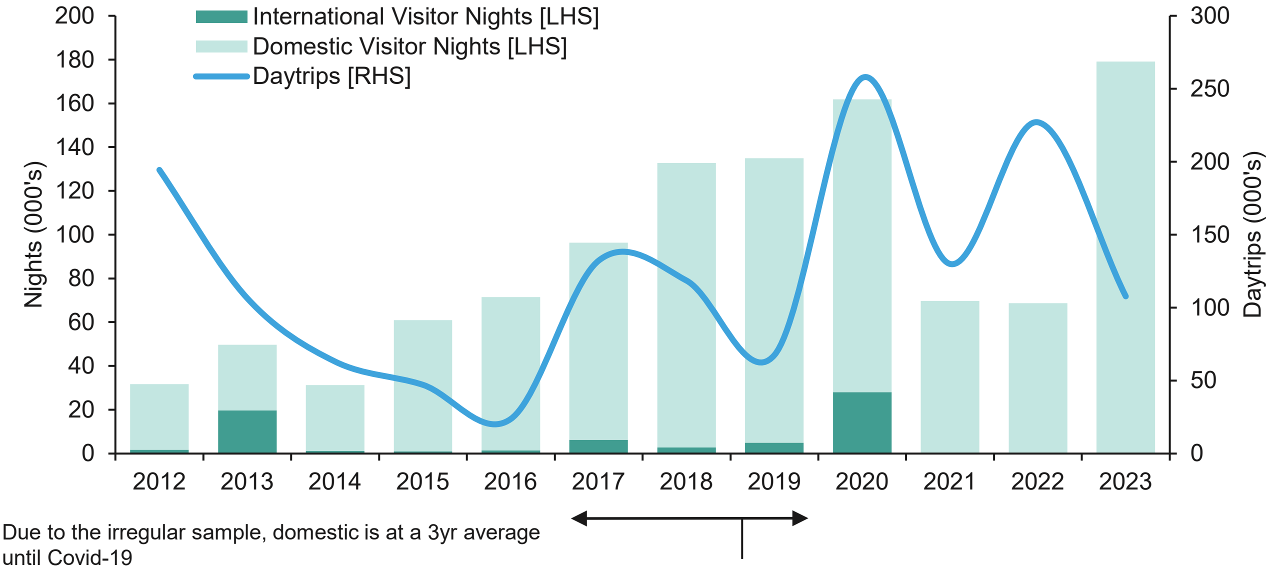
- Insta Experiences
- Day-Blitzer
- Locally Grown Followers
- Nature Trailblazers

Detail further on pages 54, 55 and 57



Historical International and Domestic Visitor Nights

2012 to 2023, Year to June

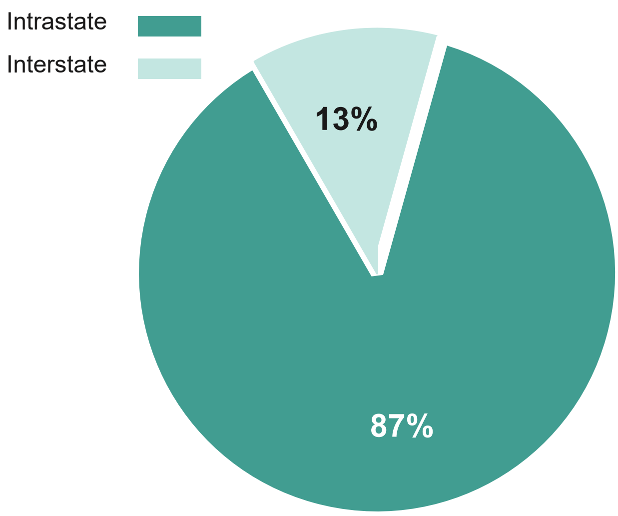


Due to the irregular sample, domestic is at a 3yr average until Covid-19

Source: TRA, Urbis

State of Origin

Domestic Visitor Nights 2017-19 Average

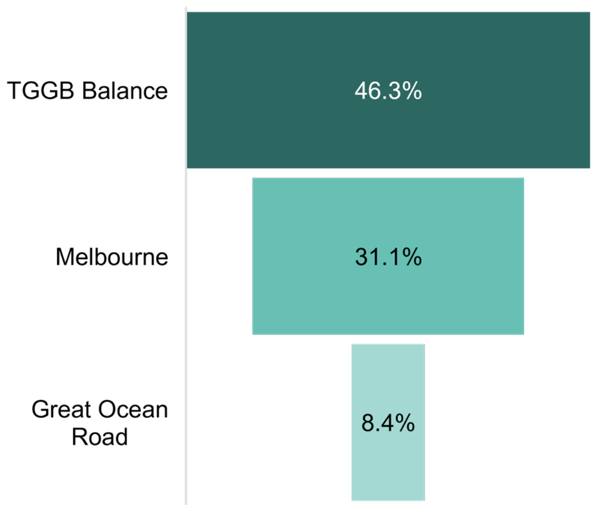


Golden Plains South experiences relatively low visitation compared to the other sub regions, although this has been trending up in recent years. The area is predominantly rural, with its main visitor drawcards, for reasons other than visiting friends and relatives, being festivals and wineries. Meredith and Golden Plains festivals alone draw around 25,000 people to the region each year, but the spill over benefits to the local community would be heavily concentrated.

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 year round visitation that would then warrant investment into developing tourism infrastructure. Equally there is an opportunity to harness the sizeable cohorts attending the local festivals towards other aspects of the sub region.

Tourism Region of Origin

Daytrips 2017-19 Average



BELLARINE NORTH SUB REGION DEEP-DIVE

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.

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	**621k**
Holiday	69%
Visiting Friends and Relatives	26%
Other Reason	3%

International Visitor Nights	**41k**
Visiting Friends and Relatives	77%
Holiday	22%
Education	1%

Daytrips	**300k**
Holiday	63%
Visiting Friends and Relatives	26%
Business	7%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

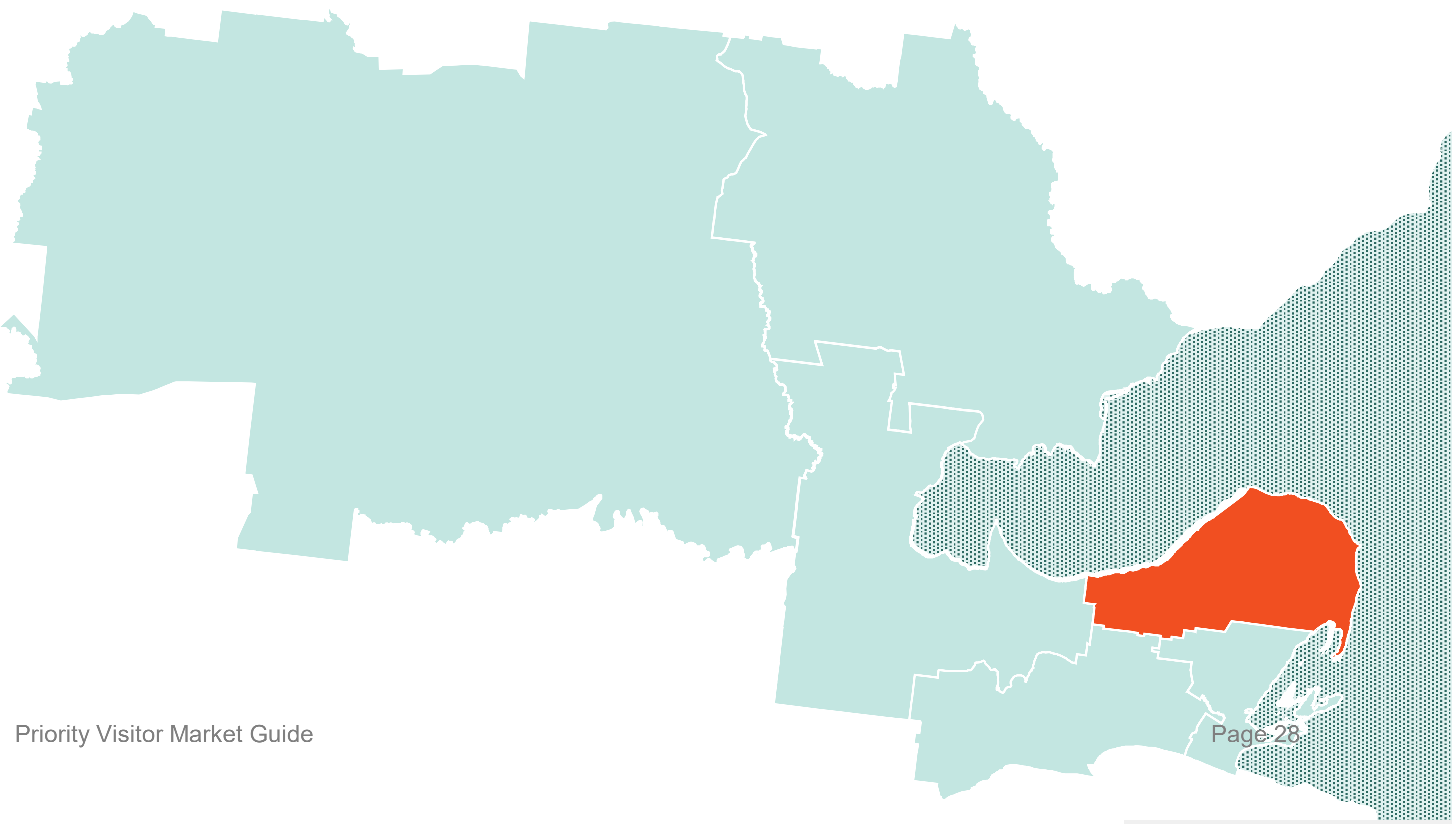
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
340	**1,290**	**370**

Source: STR, Urbis

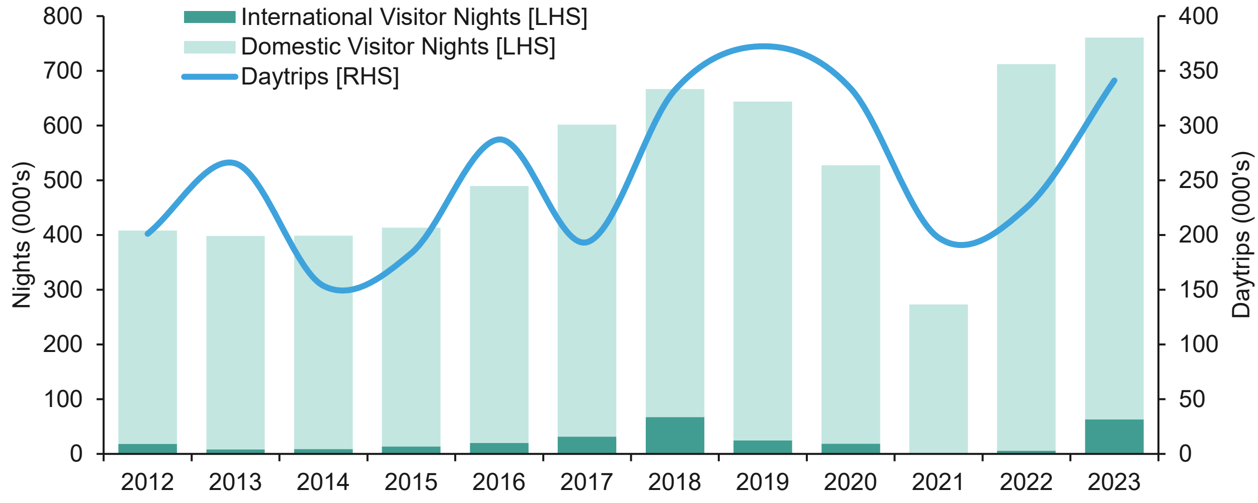
Regional Personas

- Summertime Families
- Day-Blitzer
- Day-Blitzer (Cross-Cultural)
- Nomads

Detail further on pages 55, 56 and 57

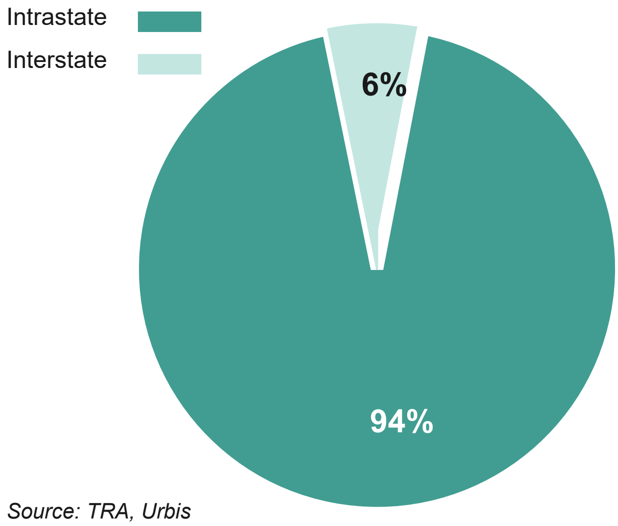


Historical International and Domestic Visitor Nights
2012 to 2023, Year to June



Due to the irregular sample, domestic is at a 3yr average until Covid-19
Source: TRA, Urbis

State of Origin
Domestic Visitor Nights 2017-19 Average



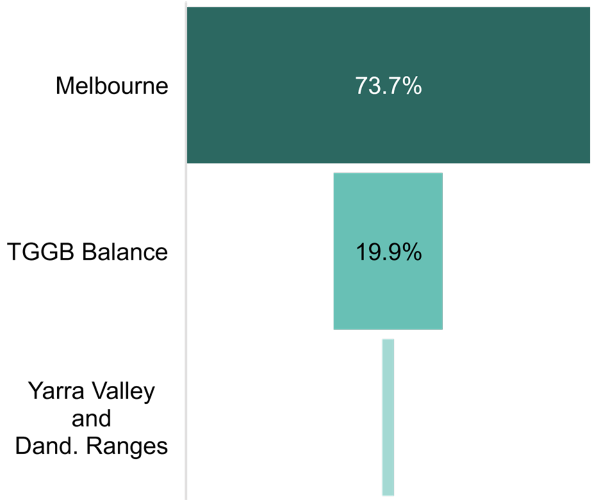
Source: TRA, Urbis

Overnight visitation to Bellarine North is predominantly from intrastate visitors, many of which have their own private accommodation. This group will often act as locals and have lower spending output.

Bellarine North facilitates a wide variety of activities for its visitors and should be able to attract higher spending short-term visitors. Daytrips, for example, are strong and pull predominantly from the Melbourne tourism region.

However, the issues of infrastructure, seasonality and accommodation supply may hinder this growth. Bellarine North only hosts 340, 3-star and 4-star hotel rooms, despite the popularity amongst visitors indicating the region is an ideal holiday destination within Geelong and The Bellarine. Transport is also an issue, with only two bus lines serving the sub region at limited times.

Tourism Region of Origin
Daytrips 2017-19 Average



Source: TRA, Urbis

QUEENSCLIFF & POINT LONSDALE SUB REGION DEEP-DIVE

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

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	446k
Holiday	79%
Visiting Friends and Relatives	20%
Other Reason	1%

International Visitor Nights	11k
Visiting Friends and Relatives	52%
Holiday	43%
Education	4%

Daytrips	277k
Holiday	81%
Visiting Friends and Relatives	14%
Business	4%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

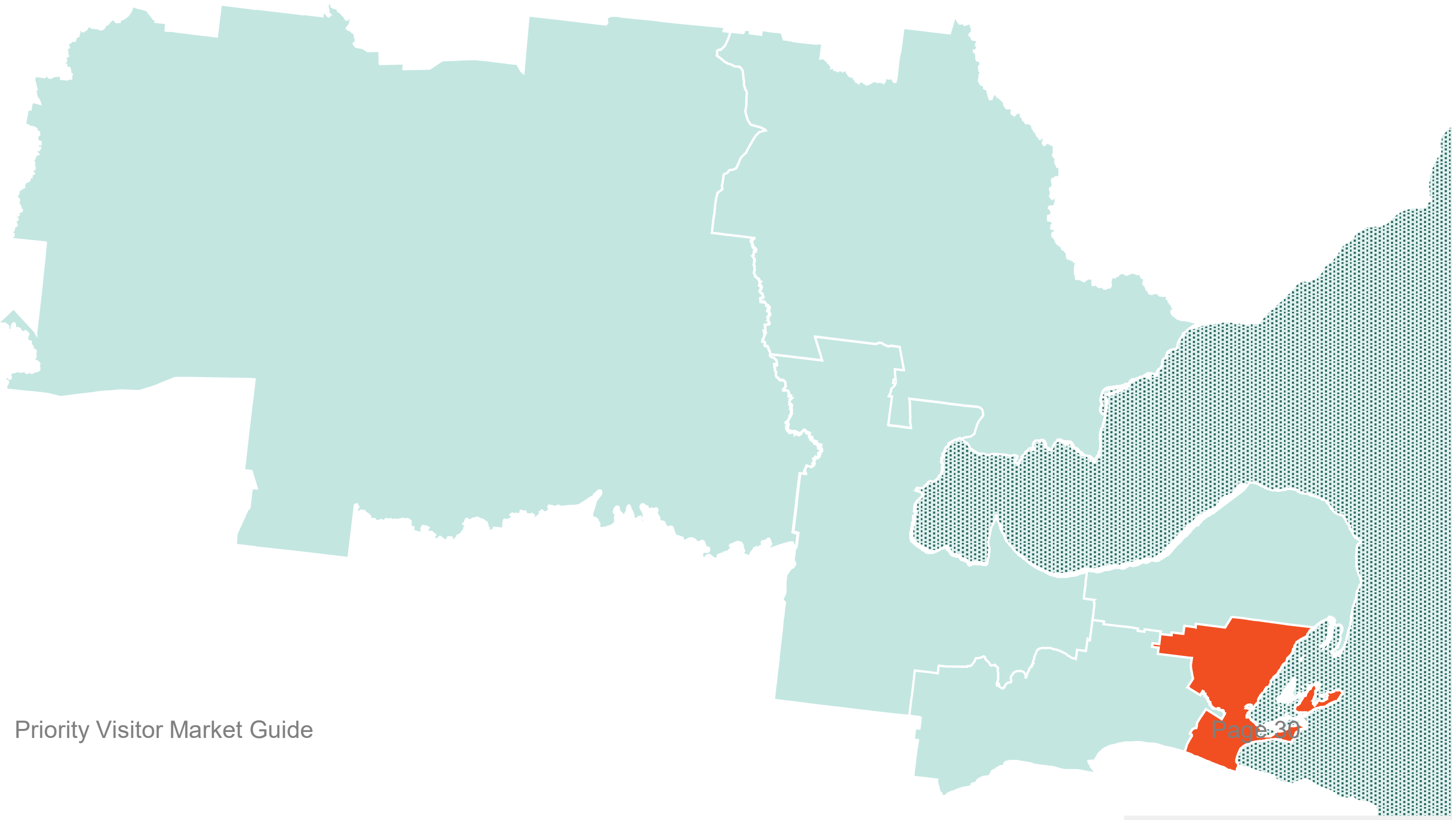
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
660	280	230

Source: STR, Urbis

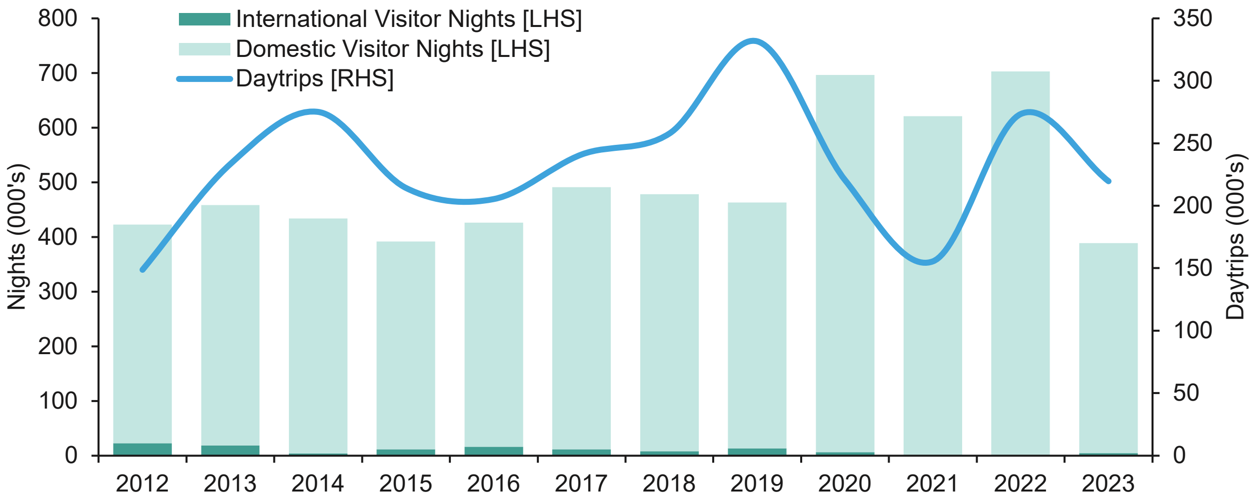
Regional Personas

- Summertime Families
- Day-Blitzer
- Insta Experiences
- Nomads

Detail further on pages 54, 55, 56 and 57

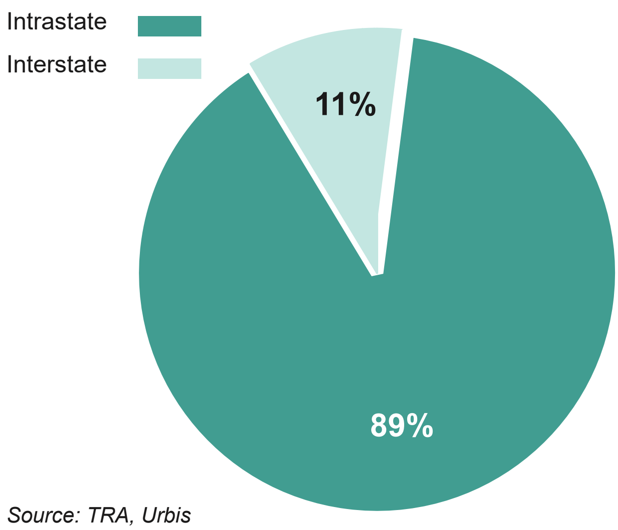


Historical International and Domestic Visitor Nights
2012 to 2023, Year to June



Due to the irregular sample, domestic is at a 3yr average until Covid-19
Source: TRA, Urbis

State of Origin
Domestic Visitor Nights 2017-19 Average



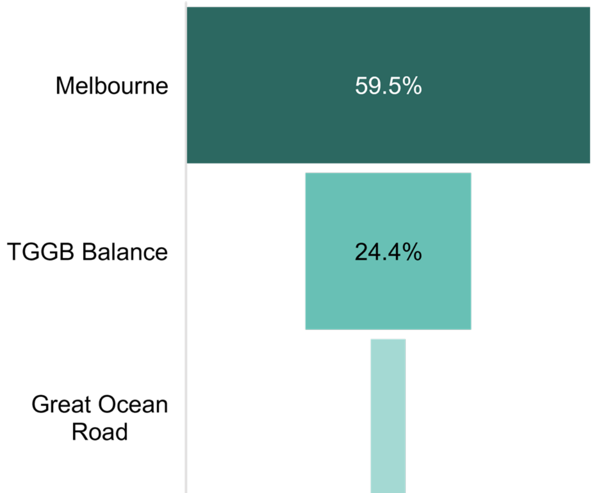
Source: TRA, Urbis

Visitor nights have remained consistent over the last decade in Queenscliff & Point Lonsdale. Interestingly, there has been a spike in 2020 and 2021 which is attributed to an uplift in VFR and Business travel in this time.

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 the engagement survey.

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.

Tourism Region of Origin
Daytrips 2017-19 Average



Source: TRA, Urbis

BELLARINE SOUTH SUB REGION DEEP-DIVE

From the HMD, visitors tended 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 houses.

Purpose of Visit
2017-19 Averages

Domestic Visitor Nights	710k
Holiday	65%
Visiting Friends and Relatives	30%
Business	4%

International Visitor Nights	39k
Visiting Friends and Relatives	87%
Other Reason	5%
Holiday	4%

Daytrips	327k
Holiday	49%
Visiting Friends and Relatives	41%
Business	6%

Source: TRA, Urbis

Recorded Accommodation
As at 2023

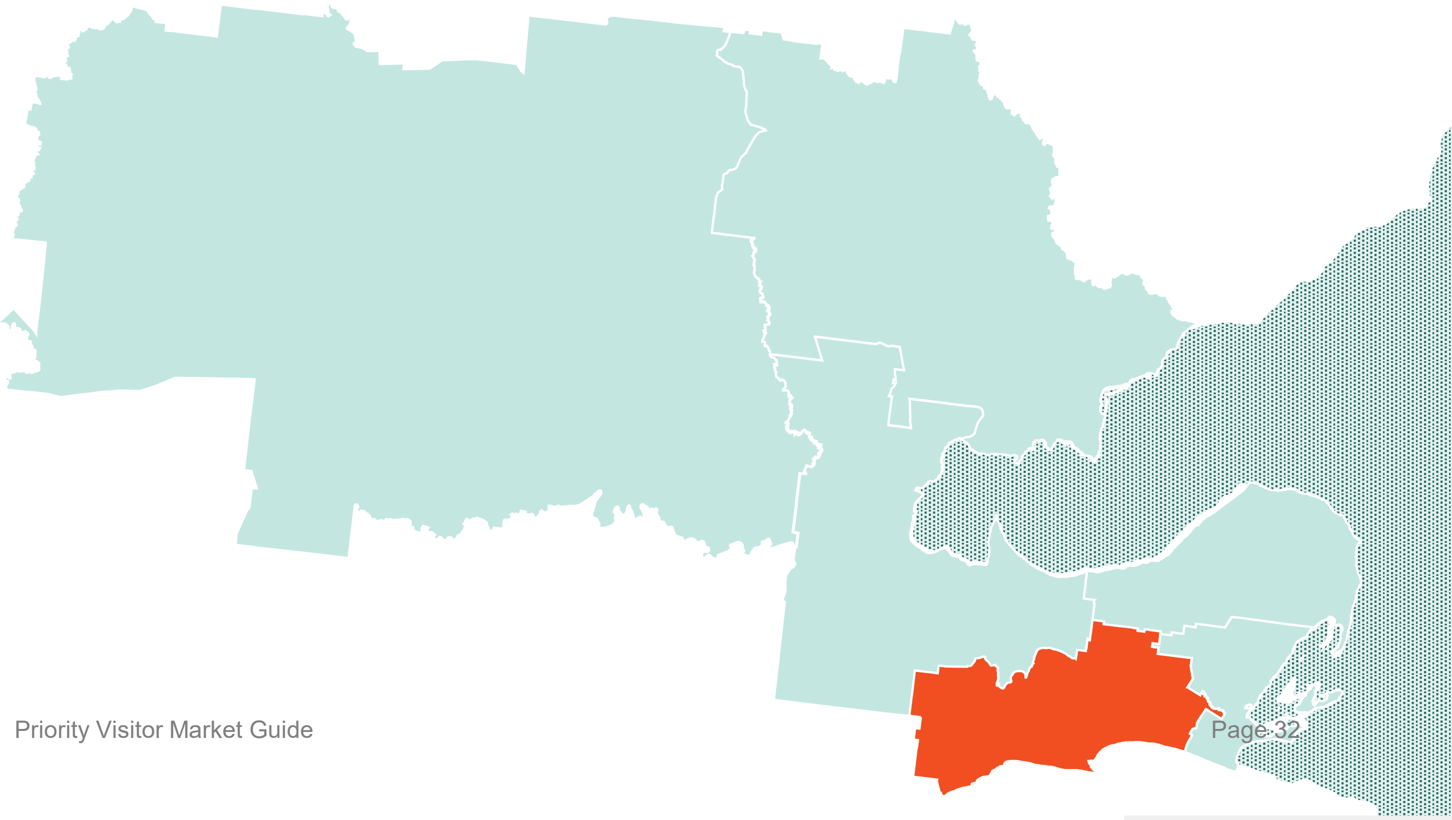
Hotels, Motels and Serviced Apartment Rooms	Caravan Parks and Commercial Camping	Un-serviced Short Term Rentals (e.g. Airbnb, Stayz)
570	1,380	650

Source: STR, Urbis

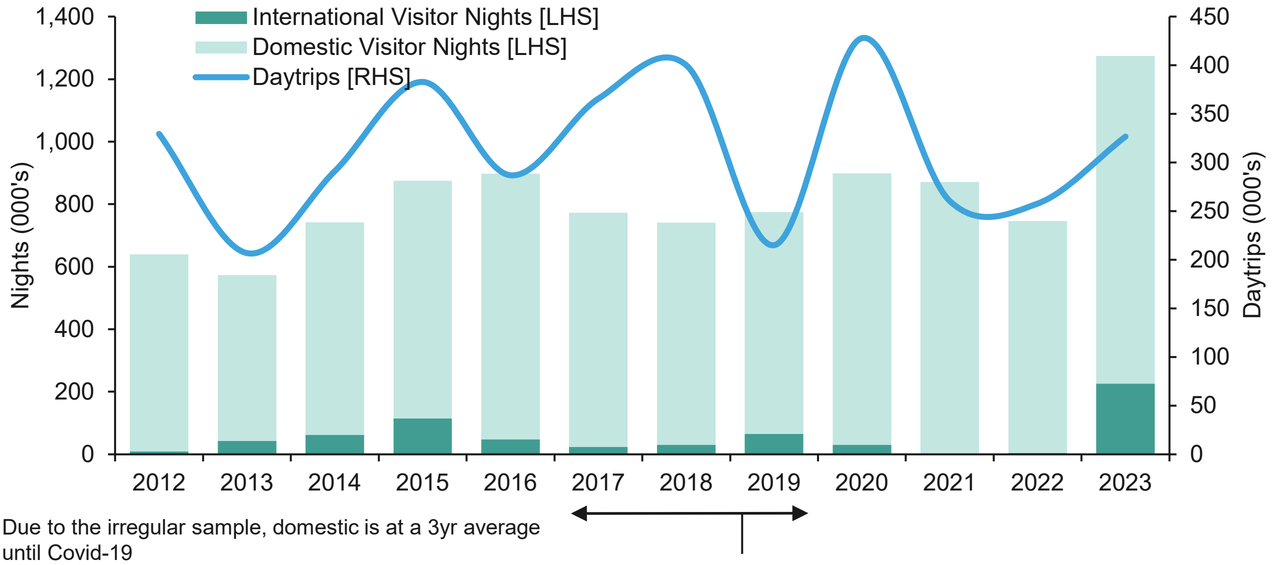
Regional Personas

- Summertime Families
- Day-Blitzer
- Day-Blitzer (Cross-Cultural)
- Nomads

Detail further on pages 55, 56 and 57

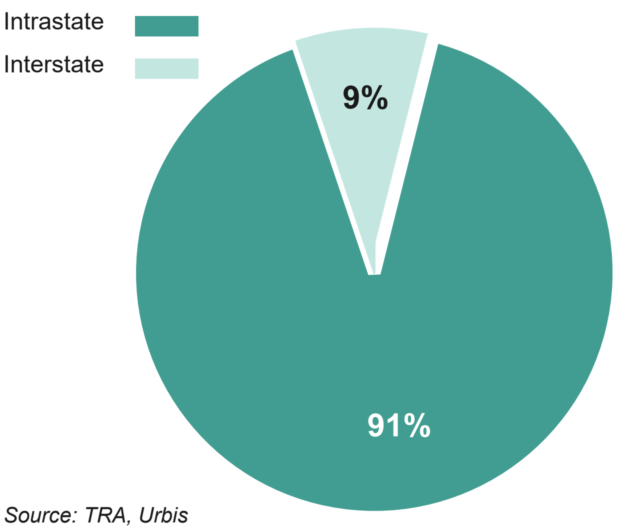


Historical International and Domestic Visitor Nights
2012 to 2023, Year to June



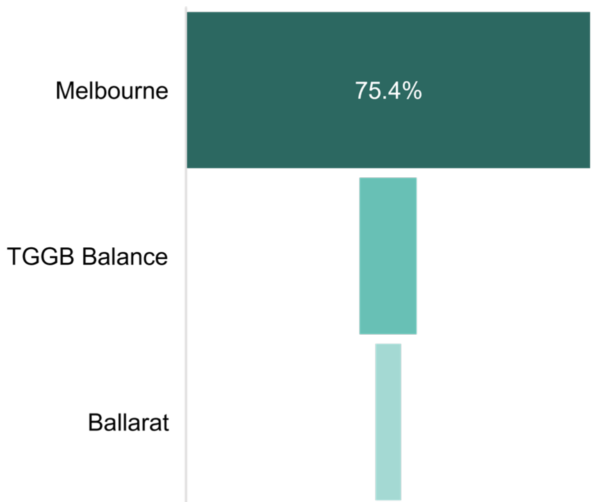
Due to the irregular sample, domestic is at a 3yr average until Covid-19
Source: TRA, Urbis

State of Origin
Domestic Visitor Nights 2017-19 Average



Source: TRA, Urbis

Tourism Region of Origin
Daytrips 2017-19 Average



Source: TRA, Urbis

Bellarine South has some of the highest visitation outside of Geelong Urban. This is largely from domestic holiday goers, visiting key destinations along the coast around Barwon Heads and Ocean Grove. Similarly to Bellarine North, visitation was not affected during Covid-19, as many sought to retreat to the coast as much as possible around the lockdowns.

A major challenge for visitation in Bellarine South is seasonality due to weather patterns. 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.

Similarly, whilst there is plenty of supply in the sub region, it is predominantly Caravan Parks and Airbnb's, which mainly service holiday visitors. Businesses looking to service events such as weddings or conferences along the coast would struggle to find suitable accommodation for guests.

VISITORS' SPATIAL & TEMPORAL PATTERNS

Using Human Movement Data, Urbis has further interrogated the movement patterns of visitors from around the State, Australia and Internationally to draw out patterns of activity.

WHEN DOES VISITATION OCCUR – SEASON

Whilst it is a core driver of visitation across tourism regions in Australia and the world, natural peaks and troughs of the weather create visitation that causes a variety of issues for locals, businesses and infrastructure.

Ocean Grove and Barwon Heads are an example of where seasonal visitation is prevalent in Geelong and The Bellarine. The summer months brings waves of families and others to the beach side towns looking to make the most of the warmer weather during school holiday periods.

There are three headline issues that destinations reliant on seasonal visitation and experience. These can be summarised as:

1. *Sustainability of the Natural Environment and Infrastructure*

Environmental and infrastructural decay can be expediated by over population within a tourism region, especially if the region is only set up for handling the requirements of the local population.

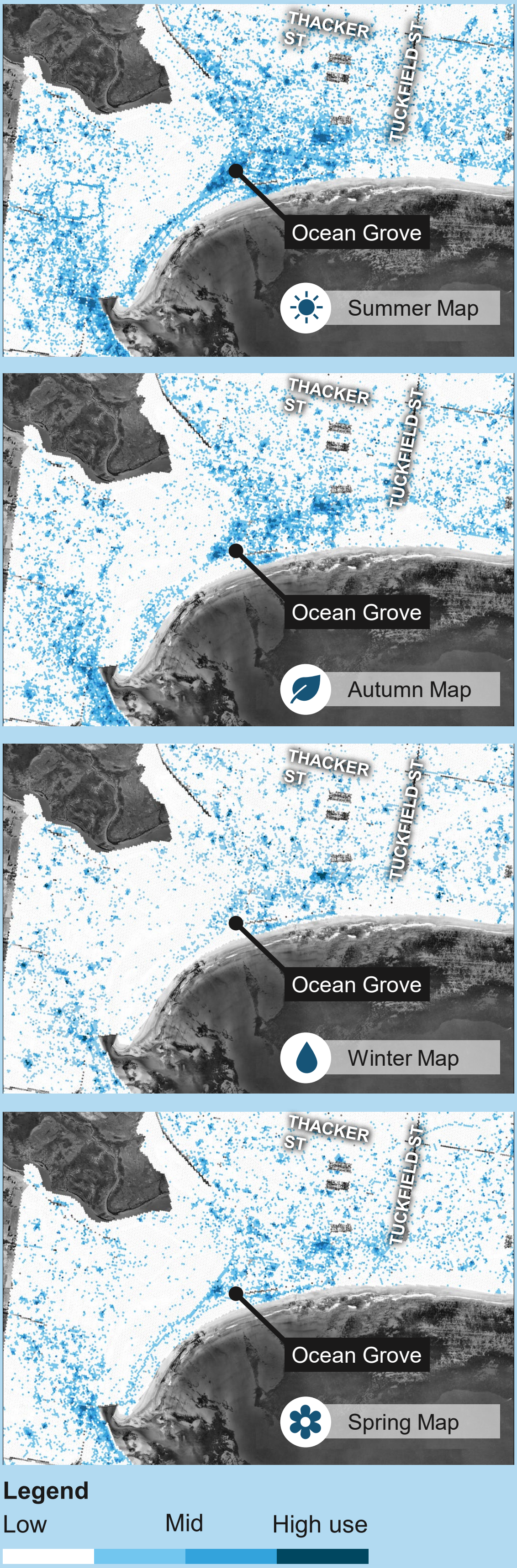
2. *Attraction and Retention of Labour*

Seasonal tourism markets have equally highly imbalanced labour requirements throughout the year. This makes it difficult to retain staff long-term, as many will be surplus to activities once the busy season is over. Equally the expensive and intensive task of attracting new workers becomes regular occurrence, made even more difficult in regional where there are lower local labour pools to draw from. This is all before the additional costs associated with staff training and management.

3. *Economic Inefficiencies*

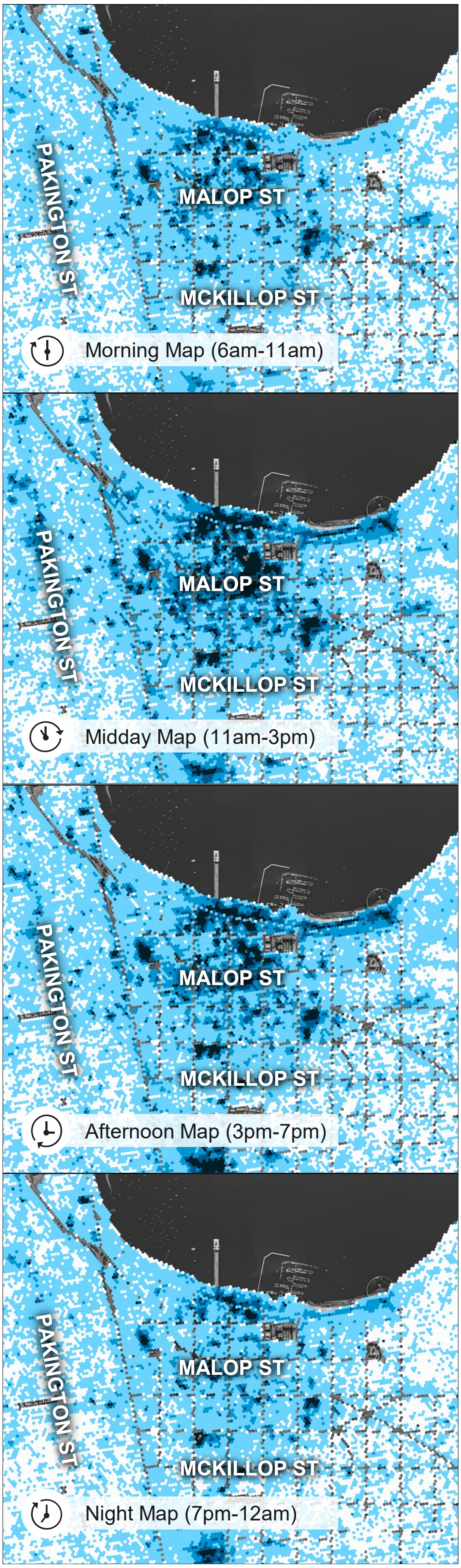
Many costs are incurred by local businesses and government organisations in the uptake of infrastructure and facilities to host visitor flows. If these are not being used year round, these costs need to be offset by revenue within a small section of the year.

Strategies to move towards "year-round" tourism would be beneficial to the businesses and infrastructure supporting growth in local visitation.



Source: Near (2018 and 2019)

WHEN DOES VISITATION OCCUR – TIME OF DAY



Source: Near (2018 and 2019)

Visitors, particularly those to urban centres such as Geelong CBD, want to fill out their day with activities and experiences, inflating demand for services beyond the working day.

Tourist visitation is usually most prominent during the midday and early afternoon. This aligns with the time that, most attractions will be operating, and the weather is peaking for natural environments. Finding avenues to expand the visitation of tourists across the hours of the day can have a multitude of associated impacts.

- ***Opportunities for Local Business and Employment***
  Naturally as you increase the hours of day that are active, you increase, in most instances, the business potential, leading to greater outcomes for owners and the labour market.

- ***Public Space Revitalisation and Improved Safety***
  Increasing the extent of trading hours will have flow on effects in space activation and revitalisation. Equally greater numbers of people into the night-time will improve the experience of public spaces for locals and visitors both in terms of atmosphere and safety.

These points are noted to be more relevant to urban cores such as in the Geelong CBD, where there is potential for a greater density of tourist and local visitation to hold up full day activation, as well as being respectful of regional and coastal towns' residential population, whom often are escaping the bustle associated with central city regions.

Legend

Low Mid High use

WHEN DOES VISITATION OCCUR – EVENT SPIKES

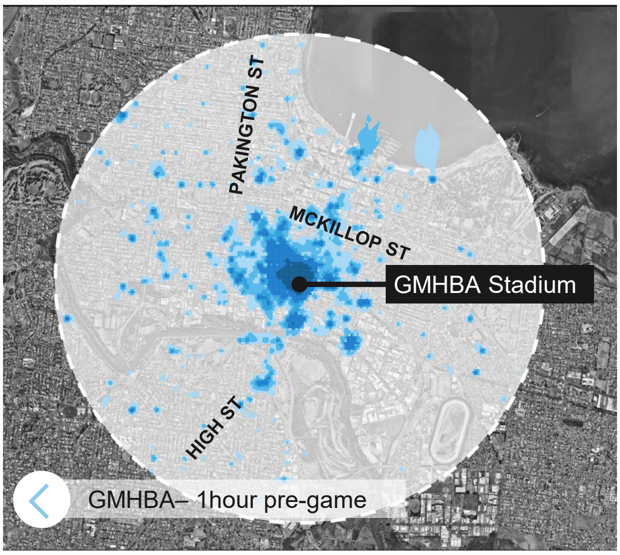
Visitation spikes can not only occur through seasonal shifts or time of day activation, but also with largescale events like what occurs regularly at GMHBA Stadium.

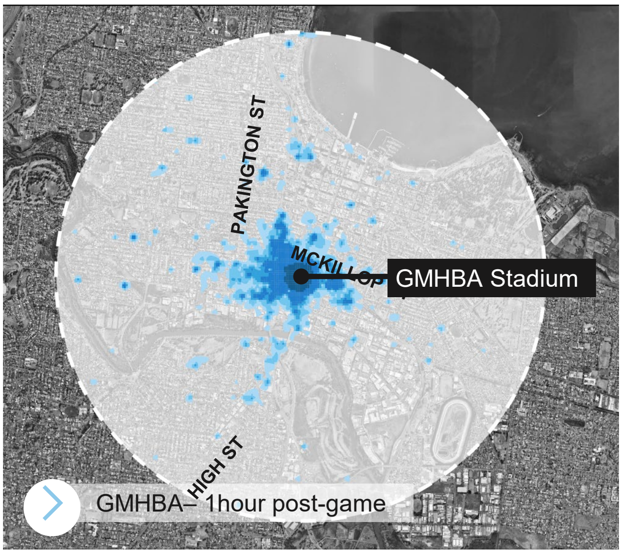
Events are one of the best ways of attracting visitors from outside of the local region. They give a trip a central purpose, around which, the visitor will be looking to explore and make the most of the services of the surrounding region, creating the potential for spill-over economic benefits to other neighbouring spaces.

- ***Spill-over Spending and Visitation***
  Depending on the scale of the event, it can draw in visitors to the local region for the day or over multiple nights. Around the event these visitors will be looking for things to do/experiences and this can be positive for local businesses, commercial accommodation and tourism providers in terms of revenue and capacity to employ more people.

- ***Elevate the Location as a 'Destination'***
  A large-scale event or consistent series of events (e.g. The AFL, AFLW or an international level concert at GMHBA) can help establish the location as a tourist 'destination' to spurn higher growth in the share of visitation into the future.

On the flip side there are longer term sustainability considerations associated with events. Large crowds and the building of new infrastructure are great for business but can put a strain on the natural environment. Equally, infrastructure that is built without a plan to convert or re-use, post-event, can prove to be a large wasted investment that impacts financial sustainability. Caution and care should be made to address both concerns.





Legend

Low Mid High use

We have used an example of interregional visitors to GMHBA Stadium on a match day to highlight how this visitation is spread pre and post event.

Pre-event visitation is spread out across inner Geelong in places such as the waterfront, Little Malop Street, Pakington Street, High Street Belmont and Fyans Street precinct, which includes the popular Little Creatures and White Rabbit breweries. This highlights interestingly that visitor activity can be harnessed from a wide net pre-event, and event-linked activation or attraction strategies could be successful in multiple places around the city.

Post-event however shows to have a much tighter draw and event goers look to either go straight home or to their accommodation, leaving the area, or to immediately surrounding retail and venues, highlighting the importance of creating better and more frequent connections into the CBD to encourage more activation.

Source: Near (2018 and 2019)

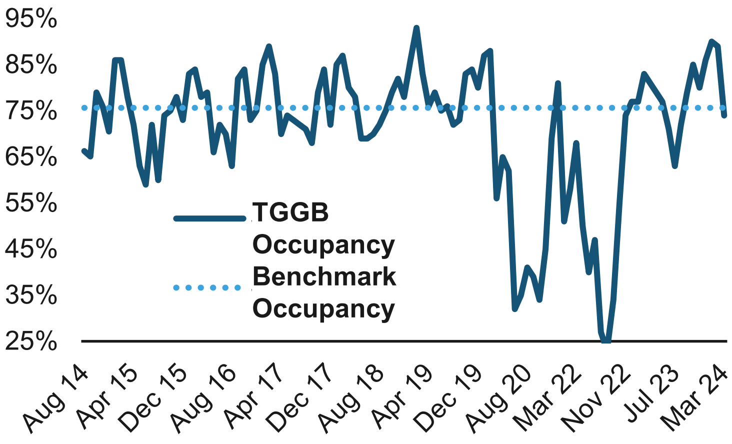
COMMERCIAL ACCOMMODATION IN GREATER GEELONG AND THE BELLARINE

This section looks at the supply of commercial accommodation in the Geelong and The Bellarine Tourism Region. STR Global has been used to collect analysis on hotel and serviced apartment supply. This database has been supplemented by internal research on other types of accommodation.

The Geelong and The Bellarine commercial accommodation market is characterised by strong seasonal changes, with peak seasons typically falling between spring and autumn.

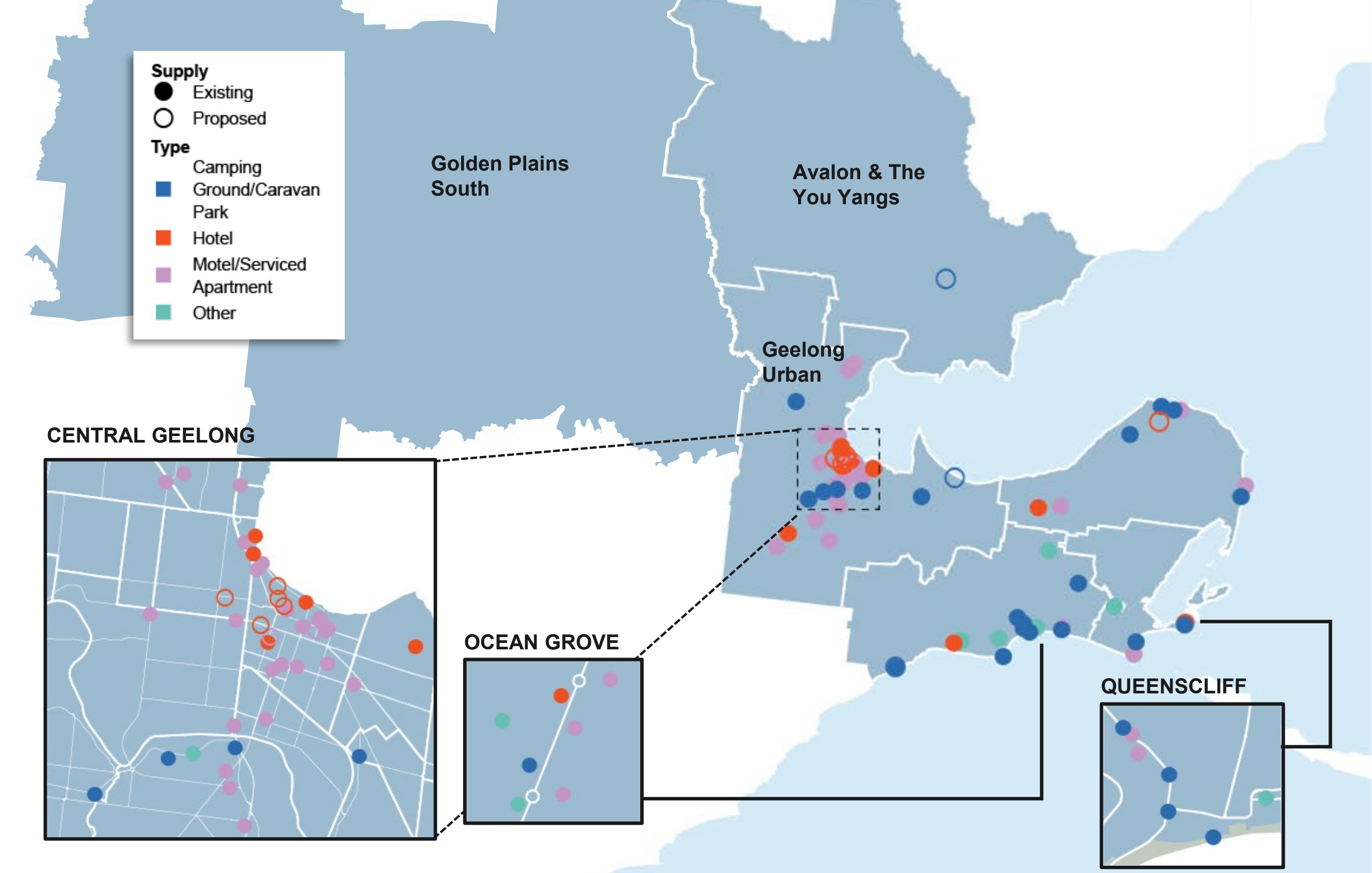
An occupancy of around 75% is considered a healthy occupancy for commercial accommodation in Australia. As can be seen to the right, hotel and serviced apartment occupancy fluctuates seasonally between 65% - 85% in TGGB, growing slightly since 2014. This indicates that supply is being stretched over time, and seasonal events are pushing occupancy into unsustainable levels.

Monthly Hotel and Serviced Apartment Occupancy Level

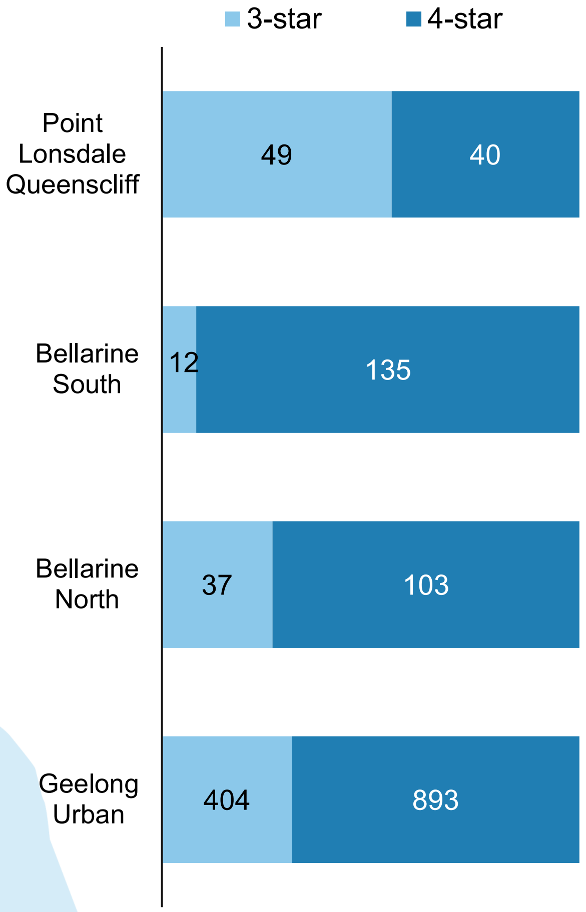


Source: STR Global, Urbis

Distribution of Commercial Accommodation
2022



Hotel and Serviced Apartment Quality
Sub Region Split, 2023



Source: STR, Urbis

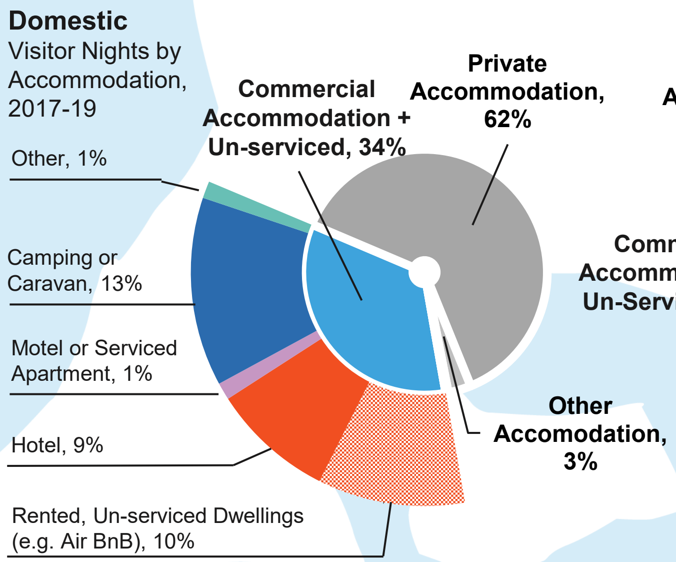
In terms of the **quantity** of the existing supply (see map) of commercial accommodation, excluding caravan parks and campgrounds, the majority of the current offer is dispersed around the Geelong Urban region at a total of 1,300 rooms. In contrast, the areas comprising Bellarine North and South along with Point Lonsdale – Queenscliff reported significantly lower room numbers as evidenced on the adjacent chart.

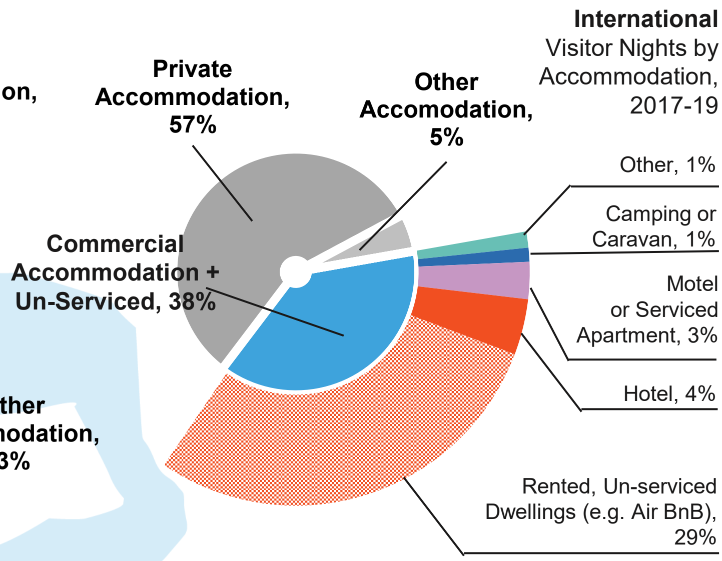
Furthermore, there is also an observed lack of high **quality** commercial accommodation. As seen on the map and adjacent chart, the number of 4-star rooms in the areas other than Geelong Urban is just short of 300. In addition, there are currently no 5-star offerings in the existing supply.

In terms of future supply, the **development pipeline** suggests that by 2027 there are an anticipated 1,170 rooms to be delivered across the region. Geelong Urban will take on the majority of these. Proposals are shown by the unfilled circles on the map.

Based on the domestic and international visitor nights to the region, nights spent in commercial accommodation comprised around between 34% and 38% of domestic and international visitor nights respectively. Interestingly, 10% of domestic and 29% of international nights in commercial accommodation are spent within serviced rental dwellings such as Air BnB.

Note: According to Air DNA there were approximately 1,777 dwellings that could be booked for short stays online as at June 2022.





Source: TRA, Urbis
Note: These proportions are based on a pre-pandemic average from 2017-19 and won't add to 100% as Transit & Unknown have not been shown

FUTURE VISITATION TO GEELONG & THE BELLARINE

Looking forward, there is expected to be significant investment in Geelong to bolster visitation.

Bringing in estimates on how this investment will translate into additional visitors above a baseline projection for growth, Urbis has projected scenarios for growth in visitor nights, daytrips, spend and commercial accommodation capacity.

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 with 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

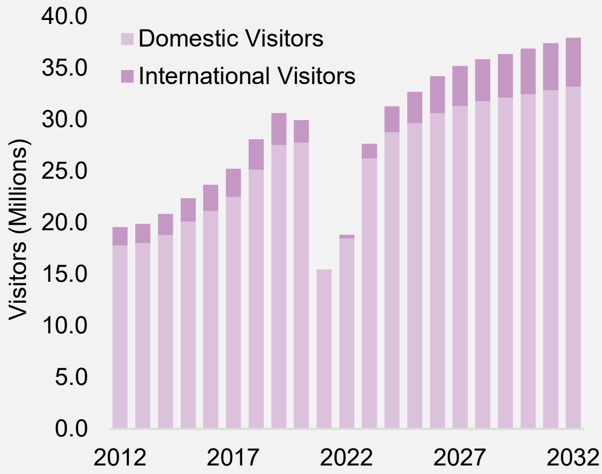
VISITOR PROJECTION SCENARIOS

With an understanding of key projects, here we look at visitor and spending projections for the region.

Baseline Scenario:
Market Share of State

Urbis has conducted visitor forecasts for Australia and by State, distinguishing between domestic purpose of visit and international country of origin. These have then been allocated down using market shares from TRA to the Geelong and Bellarine tourist region. Intrastate visitation has been separately determined using relevant metrics such as population for VFR travel. The baseline impact of major tourism related projects in the pipeline has also been added on top, reflecting a safe level of occupancy and demand.

Historical and Forecast Visitors to Victoria
2012 - 2032



Source: ABS, TRA, State Budget 2021-22

Medium Scenario:
Incorporating Infrastructure Upgrades and Targeted Future Investment

Building upon the Baseline Scenario for growth, we have inflated the growth related to major tourism related projects (previous page) within the Geelong and The Bellarine Tourism Region pipeline for the medium scenario. The share of State visitors has also been inflated to match regions around the State that are currently more attractive destinations. Visitor nights have increased slightly.

High Scenario:
If Existing Infrastructure Pipeline is Bolstered in the Longer Term

The high scenario for growth looks at the upper range of growth potential given the analysed supply of investment and investment that could occur beyond this. This is done by taking a higher scenario for “stickiness”, inflating the visitor nights figure to the highest band seen in analysis of historical trends for the region.

15
ANALYSED PROJECTS
Known Supply of $2.5B+
(see previous page)

Source: G21, Cordell, City of Greater Geelong

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.

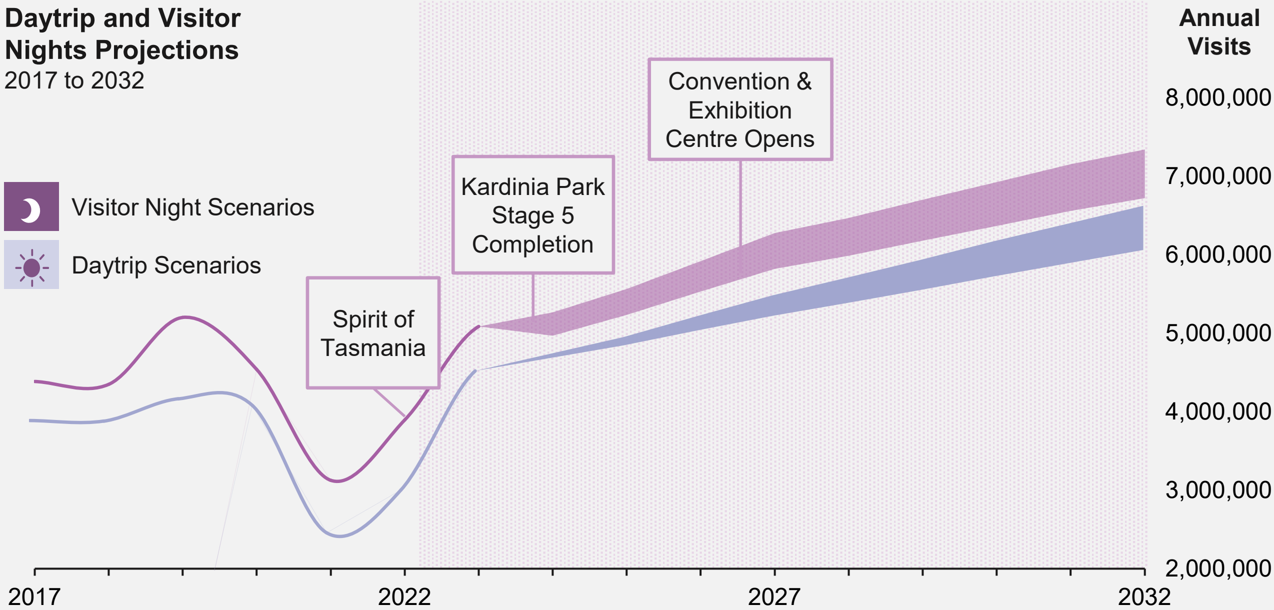
With significant investment in projects such as the Spirit of Tasmania, the Geelong Convention and Exhibition Centre and a bolstered cultural precinct, the region will see higher levels of visitation across the next ten years and beyond. Furthermore, the proximity to Melbourne, the supply of additional 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, to increase by 40% in daytrips and 50% in visitor nights.

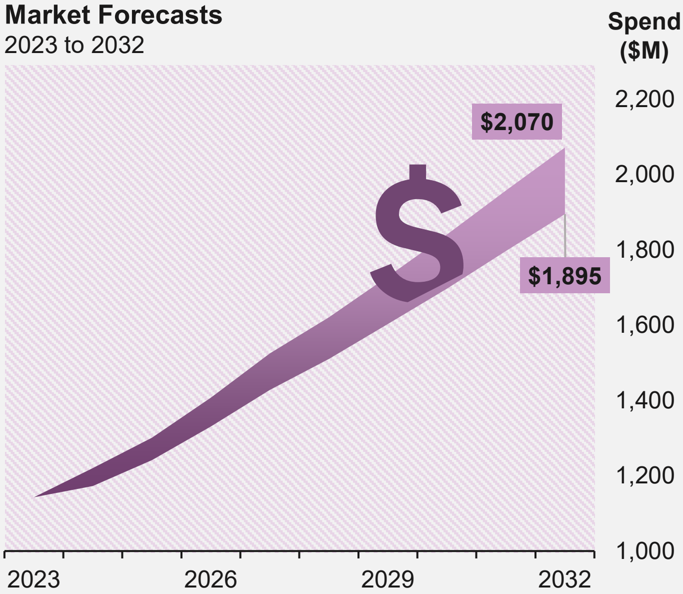
Tourism will re-emerge as a dominant contributor to the economy over the next 10 years, spurred on by known investment and further enhancement of the regions offers.

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

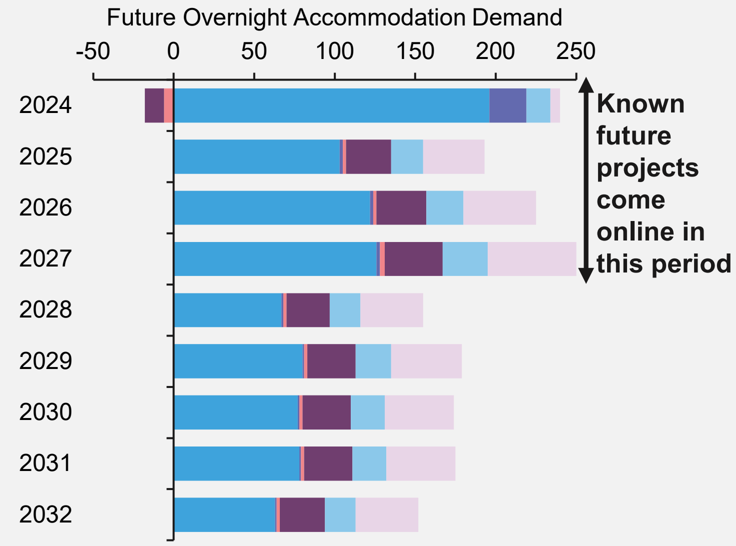
Visitor night projections have been here transformed into accommodation demand. This was done by using an average persons per space ratio and removing the proportion who utilise private accommodation. To the right we have shown the annual additional demand for accommodation at the medium scenario. *See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

Annual growth reflects an average of around 180 to 220 new **commercial accommodation rooms** needed per annum (or 2,065 rooms by 2032), predominantly in Geelong Urban and 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.

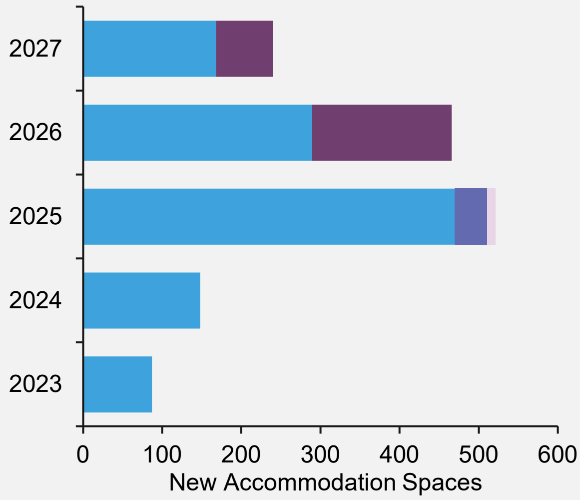
Below we have shown the gap that emerges between demand and supply when comparing the prior two analyses. Theoretical occupancy in 2022 is around 77%, that is, demand amounts to approximately 77% of supply. This figure will push towards 90% by 2032 if there are no supply additions beyond 2027. An occupancy 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).

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



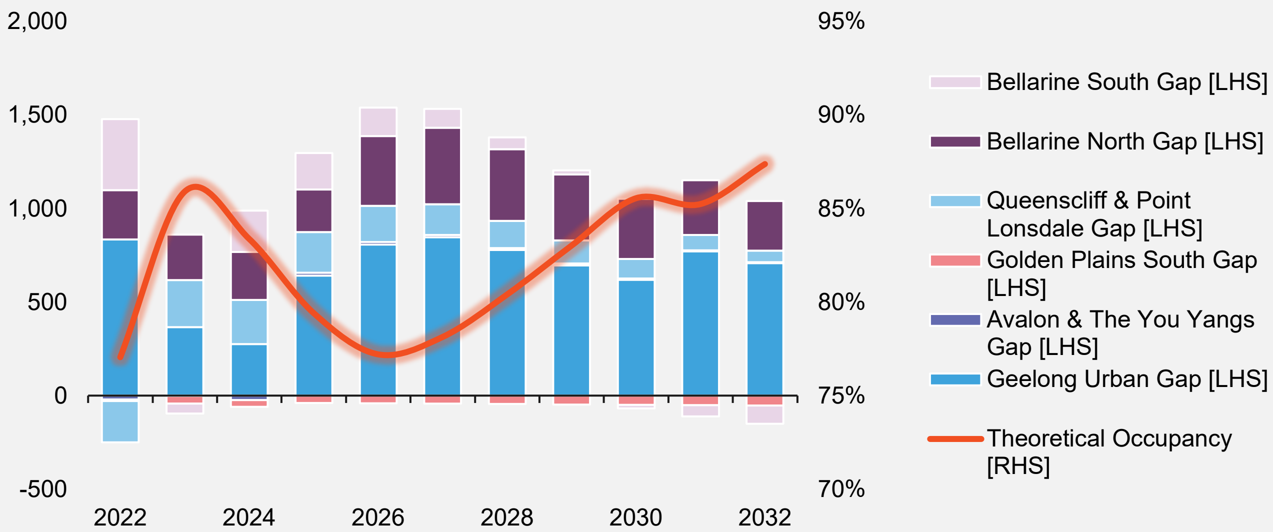
Source: Cordell, City of Greater Geelong, REMPLAN; Urbis

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



Source: Cordell, Urbis

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


VACA

THE PERSONAS

THE PERSONAS

Visitors can be categorised for the purpose of understanding needs, aspirations and engagement. Broad segmentation tends to identify visitors based on origin (intrastate, interstate, overseas) and the purpose of visit such as visiting friends and families, holidays and business.

Modern travel habits do not neatly fall into a singular purpose and the reality is that purpose and activities are blended. A more meaningful approach to profiling visitors is to define based on interests, which means that experiences can be tailored to these often aligning to personal values and aspirations. In this section on personas we have identified visitors in this way. The personas are defined considering a mix of data and insights.

Current Personas

Reflects current markets taking into account:

- The purpose of travel to Geelong and The Bellarine drawing on TRA data
- The existing attributes of Geelong and The Bellarine that attract visits
- The trend towards experience travel where visitors are motivated by learning, creating memories, aligning to the values (i.e. sustainability) and getting an authentic 'local' experience.

The current personas have been selected by ensuring that the large day-tripper visitor market is included and importantly leverage what attractions and assets Geelong and The Bellarine already has to offer visitors.

In most regions of Victoria and including adjacent to Melbourne, the core set of attractions are nature, wildlife, wineries, golf and wellness based. Some regions have it all while others combine some elements. This set represents the minimum of what is required to compete for a share of the valuable Melbourne resident visitor market. Visits from regional Victoria and beyond are also important.

Aspirational Personas

Reflects the opportunities for growth visitor markets taking into account:

- The purpose of travel to Geelong and The Bellarine drawing on TRA data examining a range of reasons for travel
- Growth markets identified in the consultation with industry
- Catalytic projects that will support the offer of new experiences (i.e. Convention Centre, expansion of the Art Gallery)
- The trend towards experience motivated travel applies to the current and aspirational personas
- The increased importance of sustainability values across all visitor types. Visitors are increasingly demanding experiences with strong sustainability credentials - from experiences with a strong eco focus, green operating credentials through to sustainably minded and produced products and also are sensitive to community and cultural values.

Geelong and The Bellarine has enormous potential to attract visitors for a whole range of activities not yet synonymous with the region. By leveraging the investment in major projects and tapping into emerging trends the region could open itself up to new high value visitors.

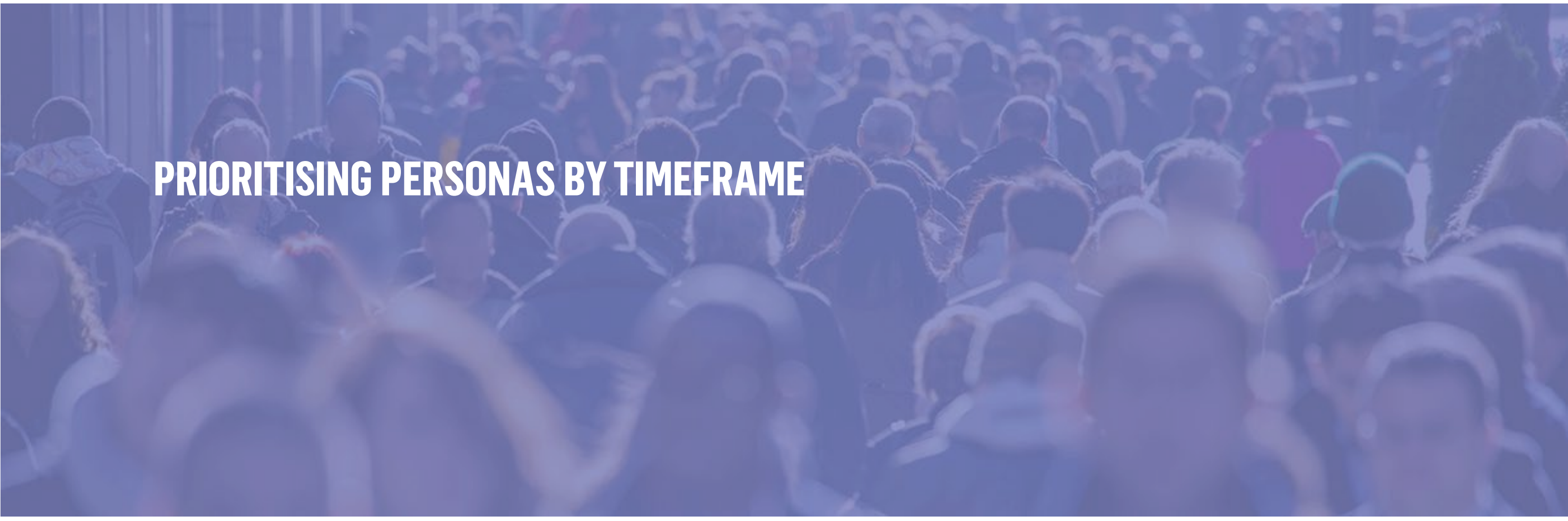
When it comes to universal trends we are seeing travellers as more purpose driven when choosing activities and places to go. Several aspirational personas identify these emerging and growing visitor types and consider the opportunity.

The Persona Development Process

The personas were originally developed by the collective Urbis project team. These were tested with the team from Tourism Geelong and The Bellarine. A workshop with a mix of TGGB members was facilitated by the project team to test, validate and obtain inputs to the personas.
Key inputs to the member workshop identified universal priorities that are relevant to all personas.

The opportunities for each persona segment will best be realised through collaboration with like minded operators, other regions and key stakeholders notably the Wadawurrung Traditional Owners.

The region's natural and Cultural assets are seen as important foundations for building experiences and a way to tell the story of what makes this region special.



PRIORITISING PERSONAS BY TIMEFRAME

There is a diverse range of visitor personas when combining the current and the aspirational. They are not all equal in the sense of timing and being immediate opportunities, apart from the current personas. When to unlock personas depends on supporting elements being available such as infrastructure. Short to medium term opportunities are possible where some attractions exist and over time with further investment and articulation could be realised. Medium to long term opportunities indicates that investment is required and not yet committed to.

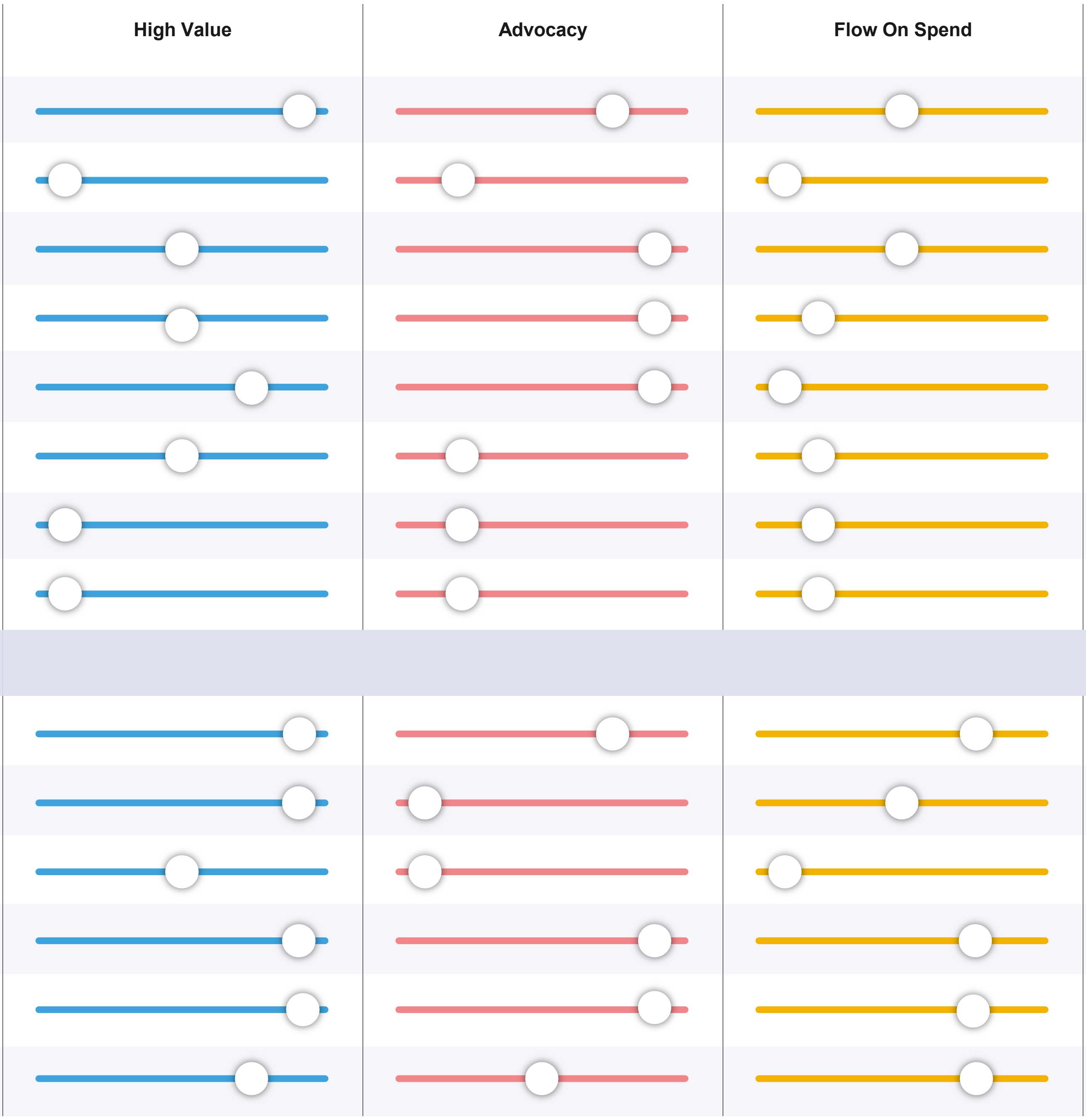
Current Personas	Short Term (0-3 years)	Medium Term (3-5 years)	Long Term (5-10 years)
Locally Grown Followers			
Nature Trailblazers			
Insta Experiences			
Summertime Followers			
Leisurely Explorers			
Nomads			
Day Blitzer			
Day Blitzer (Cross Cultural)			
Aspirational Personas			
Cultural Enthusiasts			
Conference Travellers			
Lifelong Learners			
Wellness Travellers			
Gourmet Travellers			
Active Enthusiasts			

PRIORITISING PERSONAS BY IMPACT

A qualitative assessment of potential impacts from increased visitation by persona types are considered according to:

- Highest propensity to spend, i.e. high value
- Strongest potential for word of mouth endorsement, i.e. advocacy
- Highest potential for flow on spend to businesses

Top three overall among the aspirational personas are Cultural Enthusiasts, Wellness Travellers and Active Enthusiasts.



CURRENT PERSONAS

- Locally Grown Followers
- Insta Experiences
- Nature Trailblazers
- Summertime Families
- Leisurely Explorers
- Nomads
- Day-Blitzer
- Day-Blitzer (Cross-Cultural)

The current personas have been selected by ensuring that the large day-tripper visitor market is included and importantly leverage what attractions and assets Geelong and The Bellarine already has to offer visitors.

In most regions of Victoria and including adjacent to Melbourne, the core set of attractions are nature, wildlife, wineries, golf and wellness based. Some regions have it all while others combine some elements. This set represents the minimum of what is required to compete for a share of the valuable Melbourne resident visitor market. Visits from regional Victoria and beyond are also important.

CURRENT PERSONAS

LOCALLY GROWN FOLLOWERS

Who are they
Local, intrastate and interstate visitors with high disposable incomes and an appetite for curated food and wine experiences. Young singles and couples comprise a large segment.

Motivations
Creating a catalogue of memorable food and wine experiences and spruiking the experience to their friends and family.

The Geelong / Bellarine Experience
Activities:
Winery hopping, craft beer tours, wine and gin tours, awarded restaurants
Destinations:
Little Malop Street Laneways Precinct (Central Geelong), Little Creatures and White Rabbit Brewery, Anther Distillery, Provenance Wines, Jack Rabbit Vineyard, Mt Duneed Estate, Oakdene Vineyards, Clyde Park Vineyard and Bistro, Flying Brick Cider House, The Whiskery, Moorabool Taste Trail

Challenge
Competition with other established food and wine regions such as Mornington Peninsula and Yarra Valley.

Opportunity
The opportunity is to diversify the food, wine, spirits and brewery experience to be educational, i.e. how to craft beer, cooking courses, open farms etc. Consider building in a sustainability element such as local produce, circularity (e.g. organic food waste conversion)

INSTA EXPERIENCES

Who are they
Melbourne based comprising a large proportion of young singles and couples visiting for the weekend.

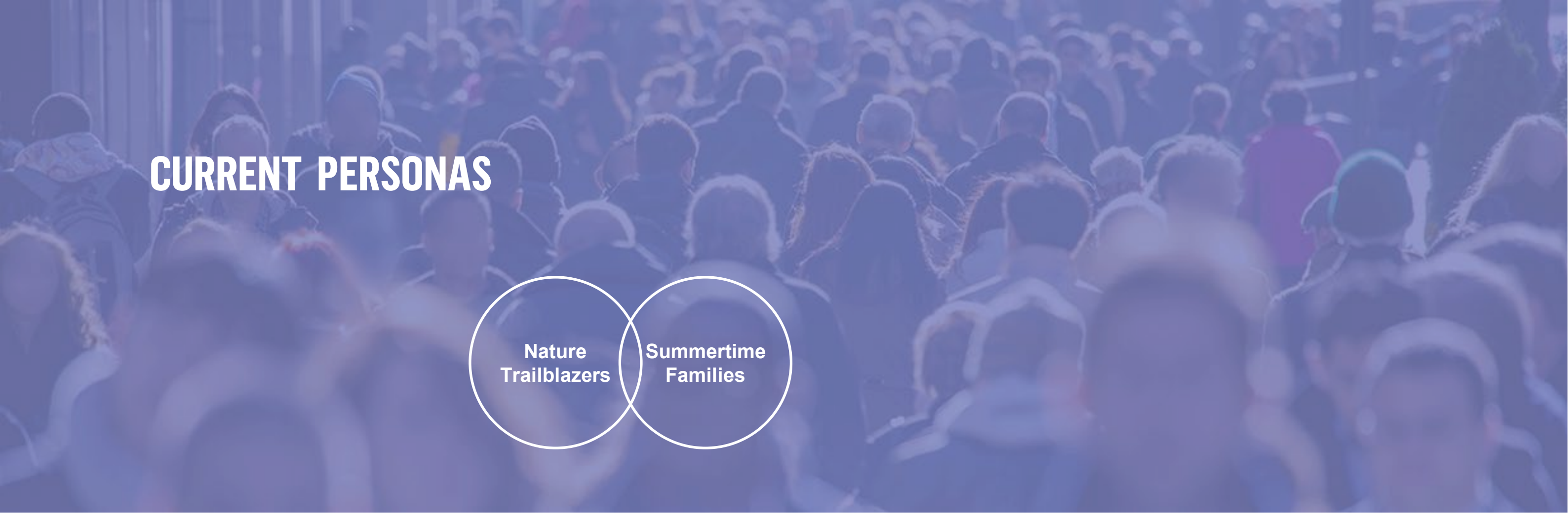
Motivations
Reset from hectic city life. They are discerning and seek out memorable and Instagram worthy experiences.

The Geelong / Bellarine Experience
Activities:
Festivals, markets, art, performances, curated shopping (e.g. Boom Gallery), bike/ebike tours, water experiences (e.g. surf, kayaking, fishing charters) wildlife (e.g. dolphins, wildlife park) private Great Ocean Road tours etc.
Destinations:
Meredith and Golden Plains Music Festival, Queenscliff Music Festival, local markets (various locations), Barwon Heads, Geelong Arts Centre, Little Malop Street Laneways Precinct (Central Geelong)

Challenge
Not top of mind as a destination packed with a weekend full of activities. Is a less glamorous and lesser-known neighbour to the Mornington Peninsula.

Opportunity
Positioning Geelong and The Bellarine as a world class cultural destination.
Potential for segmentation of experiences by theme such as shopping, photographic landscapes, festivals, sport etc.

CURRENT PERSONAS



NATURE TRAILBLAZERS

Who are they

Intrastate and interstate visitors includes singles, couples and families including many Melbourne residents visiting on the weekend.

Motivations

Reconnecting with nature and switching off from city life detoxing from digital. Looking for authentic experiences that feed the sense of wonder and passion for the outdoors.

The Geelong / Bellarine Experience

Activities:
Trail walking, mountain biking, rock climbing, nature and wildlife guided tours, bird watching, cycling, snorkeling, swimming, surfing, scuba diving, fishing.

Destinations:
You Yangs, Brisbane Ranges National Park, Barwon River Parklands, Bellarine Rail Trail, Bellarine Peninsula, Barwon Heads, Ocean Grove, Point Lonsdale

Challenge

The seasonality, weather and cool temperatures limit the region's year-round use. Converting low yielding trips to higher yielding visitors through motivating paid experiences. Lack of conservation experts.

Opportunity

Development of nature oriented immersive and educational experiences such as mountain bike clinics or wildlife rescue clinic experience, conservation learning clinics, gear hire and maintenance to support activities such as rock climbing or kayaking. Build in regenerative experiences that stretch from coastal to inland locations.

SUMMERTIME FAMILIES

Who are they

Seasonal visitors coming with families through the summer from intrastate for short and long break staying in holiday parks, camping or self-contained accommodation.

Motivations

New shared experiences and activities for the kids on a budget.

The Geelong / Bellarine Experience

Activities:
Fishing, beaches, learn to surf, boat trips, adventure parks, shopping, walking around the waterfronts

Destinations:
The townships and beaches of The Bellarine, Queenscliff, Geelong Waterfront and Eastern Beach, Adventure Park

Accommodation:
Holiday parks, camping, resorts or self-contained accommodation.

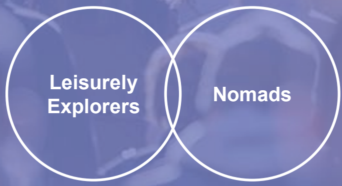
Challenge

Appropriate amenity is lacking such as public toilets, playgrounds, undercover facilities and transport. Part of this market is highly seasonal.

Opportunity

Converting these seasonal visitors to year-round visitors.

CURRENT PERSONAS



LEISURELY EXPLORERS

Who are they
Melbourne or intrastate visitors, possibly retired, vising the region on a short stay. Can be mid-week visitors not constrained by the timetables and commitments of most visitors.

Motivations
Ticking off the bucket list and reconnecting with places not visited for a while. Partly discerning and attracted to simple pleasures such as scenic drives and strolling.

The Geelong / Bellarine Experience
Activities:
Markets, museums, wineries, distilleries, restaurants, walking around, shopping, golf, botanical gardens, blended experiences

Destinations:
Central Geelong, Thirteenth Beach Resort, Portarlington, Queenscliff / Point Lonsdale, Barwon Heads Moorabool Valley vineyards

Challenge
Competing with most regions in Victoria for a share of this visitor.

Opportunity
High yielding longer stay visitor. Opportunity to convert to returning visitor tempting them with the many curated experiences and Cultural attractions.

NOMADS

Who are they
Year-round travelers on road trips in their recreation vehicles or with caravans, typically retired from intrastate and interstate. Includes future Spirit of Tasmania travelers.

Motivations
Ticking of the sights as part of their bucket list. Attracted to the freedom and flexibility of an open agenda.

The Geelong / Bellarine Experience
Activities:
Walking around, shopping, markets, bushwalking, bird watching, casual meals, museums, pubs, wineries, photography, astronomy

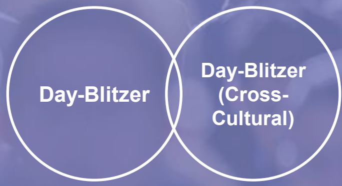
Destinations:
Holiday and caravan parks throughout The Bellarine Peninsula

Accommodation:
Recreation vehicles, caravan parks, hotels, self contained accommodation

Challenge
Highly independent and frugally minded travelers who limit spend intentionally to stretch their savings.

Opportunity
Tempt them with experiences that won't challenge the budget and make them feel they have done something special. This could be the wineries, distilleries or Cultural events and experiences.

CURRENT PERSONAS



Who are they
Predominately from Melbourne visiting friends and relatives for the day.

Motivations
Catch up with friends and relatives and an easy getaway. Diverse range of reasons for visiting the Geelong and Bellarine. The day's agenda could be led by their local friends and relatives or they could be driving their own agenda. Either way the local resident is a key influencer.

The Geelong / Bellarine Experience
Activities:
Sports events, going to the beach, markets, shopping, sightseeing, restaurants and cafes.
Destinations:
Central Geelong, Pakington Street, Queenscliff, Barwon Heads/Ocean Grove, Geelong Waterfront

Challenge
Connecting directly with visitors who may be leaning on the recommendations of their local based friends and relatives.

Opportunity
Tempting visitors to try some of the curated experiences in future trips.

Who are they
Predominately from outer Melbourne suburbs visiting friends or relatives as part of Cultural community catchups. Largely self sufficient and limited visitation of destinations.

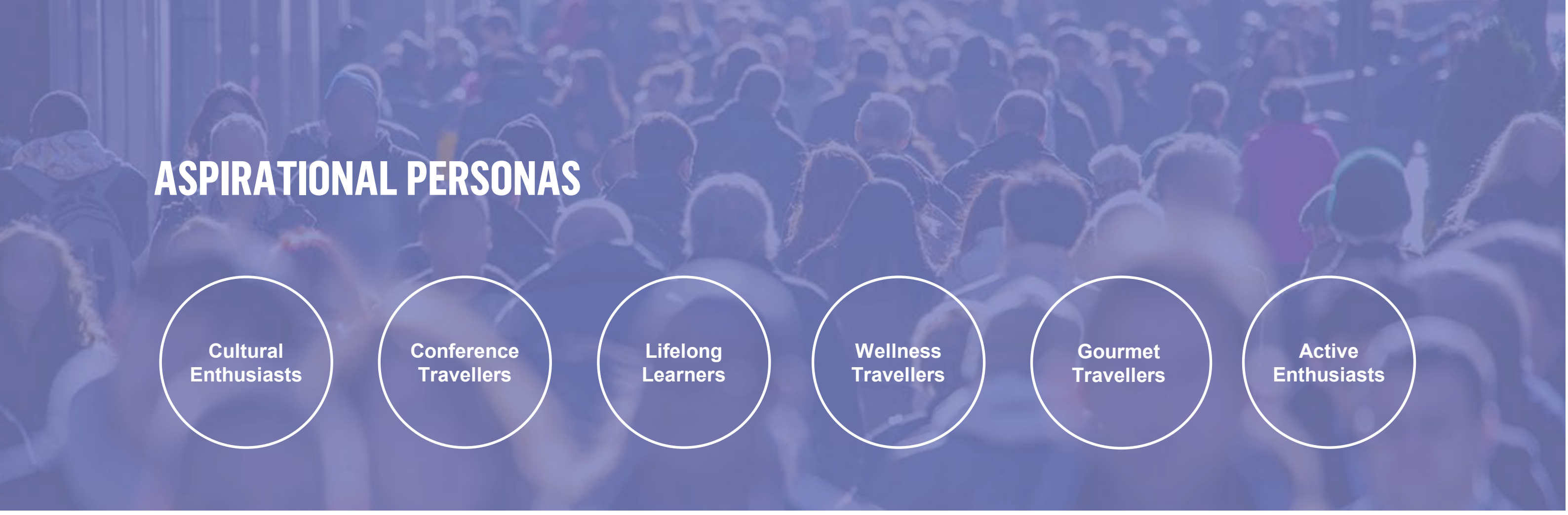
Motivations
Catch up with friends and relatives in a picturesque coastal environment.

The Geelong / Bellarine Experience
Activities:
Picnics along the waterfront, going to the beach, walking around e.g., Geelong waterfront
Destinations:
Central Geelong, Geelong Waterfront and Eastern Beach, Ocean Grove, Queenscliff

Challenge
Habits of bringing their own food and drinks to the region and mixing among Cultural groups limits spend in the region.

Opportunity
Converting visitation to paid experiences with a taste of what they could experience.

ASPIRATIONAL PERSONAS



Geelong and The Bellarine has enormous potential to attract visitors for a whole range of activities not yet synonymous with the region. By leveraging the investment in major projects and tapping into emerging trends, the region could open itself up to new high value visitors.

The arts, conferences and exhibition market will be significant for the region in a different way to how they are seen today. The development of the Geelong Convention and Exhibition Centre with its 1,000 seat plenary capacity and a 3,700 sq.m multipurpose space will give the region capacity and flexibility to host a range of event types.

When it comes to universal trends we are seeing travellers as more purpose driven when choosing activities and places to go. They are looking for experiences that reward them with personal growth and achievement.

Six personas have been identified as an opportunity to engage experience driven and high value visitors leveraging existing assets, future investment and the development of new product experiences. Each persona is seeking experiences which are underpinned by sustainability credentials - from experiences and products from businesses with a strong eco focus, green operating credentials and sensitivity to community and cultural values. Furthermore, we expect that these personas, particularly Cultural Enthusiasts, Active Enthusiasts, Wellness Travelers and Lifelong Learners, will drive a regenerative outcome.

ASPIRATIONAL PERSONAS

The aspirational personas were developed considering the aspirational growth markets identified by industry in the consultation and align to growth markets identified through engagement and survey. All are inherently experience based which means the visitor is seeking out something exceptional which should translate to a high spending visitor.

Each persona type has the potential to be a high value visitor, make a positive regenerative impact or ideally both high value and have a high regenerative impact. By regenerative impact we mean they leave the place they visited in the same state or better. The chart below shows how each persona makes a contribution on those two criteria.

Cultural Enthusiasts

Festivals and events | Art, Culture and heritage

High value

Conference Travellers

Festivals and events | Business Travel

High value

Lifelong Learners

Festivals and events | Recreation and sport

High value and high regenerative impact

Wellness Travellers

Recreation and sport

High value and high regenerative impact

Gourmet Travellers

Food & Drink

High value

Active Enthusiasts

Festivals and events | Recreation and sport

High value and high regenerative impact

Who are they
Visitors of all ages who are active in supporting the arts are often looking for events and will travel for new exhibitions, performances, events etc.

Motivations
They enjoy participating in the arts because it connects them to talented creative people and immerse in music, dance, art and theatrical experiences.

The Geelong / Bellarine Experience
Activities:
Aboriginal Culture tours, exhibitions, performances, historic guided walks, gardens

Destinations:
Convention and Exhibition Centre, Geelong Gallery, Geelong Arts Centre, Performing Arts Centre, Geelong Library & Heritage Centre, Narana Aboriginal Cultural Centre.), Wool Museum, Potato Shed.

Challenge
Establishing a reputation for Geelong as a worthy destination for Culture.

Opportunity
Opportunity for coordinated Culture and events across the region. The new Geelong Arts Centre is a catalytic project that will support the region's status as an arts destination. The Geelong Art Gallery, Geelong Convention and Exhibition Centre also provide additional infrastructure to host a range of events. Indigenous Culture is an important and un-tapped dimension of the region's Culture credentials.

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Who are they
Visitors from both interstate and intrastate in Geelong for a conference or exhibition incudes meeting and incentives travel market. Predominately business traveler.

Motivations
May be looking at the experience as an opportunity for expanding their knowledge, networking with hopes to experience at least a glimpse of a new destination.

The Geelong / Bellarine Experience
Activities:
Aboriginal Culture tours, exhibitions, visiting wineries and distilleries, boat tours, sailing etc.

Destinations:
Geelong Convention and Exhibition Centre, Geelong Gallery, GHMBA Stadium, Cunningham Pier

Challenge
Finding space in a highly programmed short stay itinerary.

Opportunity
Partnerships with the Conference and Exhibition Centre and conference organisers are key relationships for selling the Geelong and Bellarine experience. There are prospects for pre and post conference activities as delegates extend their stay to explore the area. Or they may bring family along too.

As more people discover the region as part of their business activities locally, this can lead to future investment when companies may set up locally or establish relationships with local companies.

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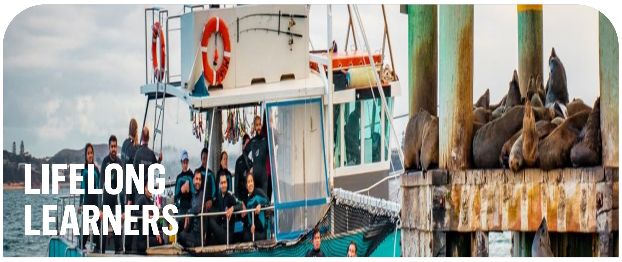

Who are they
Likely to be Melbourne based with broad age appeal. Retires with more time available could be a potential segment.

Motivations
Looking for meaningful experiences that lead to growth whether that be mentally learning something new, physically challenging themselves, or developing a hobby interest. Combining development with getting away provides dual benefits.

The Geelong / Bellarine Experience
Activities:
Sports, nature-based activities, arts and crafts, course learning.

Destinations:
Taps into existing tourist and regional assets such as Deakin University, The Gordon, national and regional parks, breweries, sporting venues (e.g., cycling, rowing, paddle boarding, triathlons etc.)

Challenge
Not established as a familiar tourism product experience. Maybe limited accommodation options for solo travelers.

Opportunity
Tapping into the values mindset of the traveler who looks at travel as a means for personal development. Potential themes could be:

- Sports coaching clinics
- Mini classes or single specialist units
- Craft classes (e.g. craft beer, cooking schools, art classes, nature photography)
- Adventure challenges (e.g. guided tours for trail walking, mountain bikes, rock climbing)

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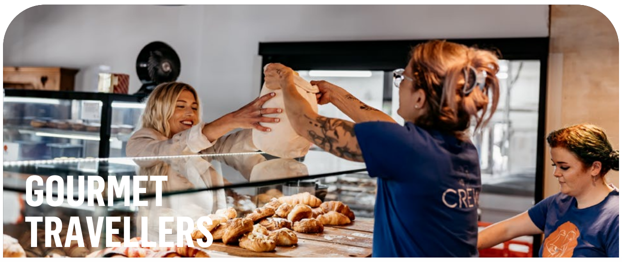

Who are they
Predominantly adults (~25 years and older) whom have over time developed an appreciation for a variety of food and beverages.

Motivations
Looking for locally produced or locally specialised food and beverages that they could not experience around their own places of residence. Equally, Gourmet Travellers seek out food and beverage destinations with overall high quality or high amenity (e.g. leveraging natural environment, great atmosphere).

The Geelong / Bellarine Experience
Activities:
Wine tours, visiting a local alcohol producer (e.g. brewery, distillery), farm production (e.g. dairy), seeking out a highly regarded local restaurant, attending local food and wine festivals or markets.

Destinations:
Bellarine Food and Wine Taste Trail, The Q Train, Moorabool Valley Wine Region, Little Creatures & White Rabbit Brewery Site, distilleries in Federal Mills, Central Geelong waterfront and laneways restaurants, local cideries.

Challenge
Establishing the region as a destination for food and wine lovers. Part and parcel in this will be expanding the trading hours that venues can operate for, where appropriate.

Opportunity
Leverage the region's agricultural base and quality food and wine production. Significant opportunities to promote the existing activities into single promotions and experiential offers and tourist trails and provide high value spin-off activities, events and quality accommodation.

Who are they

The audience seeking out options to work on their wellness is broad. A large segment is likely to be career focused on high incomes though not limited to. It could be retirees which could include those recovering from surgery.

Motivations

Self-care, responsibility, reward, indulgence and a pragmatic mindset that recognises changing the pace of living is important for a reset.

The Geelong / Bellarine Experience

Activities:

Health recovery, medical tourism, cycling routes, spas, retreats, nature walks, beaches, yoga, holistic food destinations, music, workshops

Destinations:

Lon Retreat and Spa, Lancemore Mansion Hotel, Bellarine Retreat

Challenge

The region lacks a 'hero' product such as a well-known springs drawcard as Mornington Peninsula and Daylesford offer. Investment in health spas is only one aspect though still key for a region's credentials.

Opportunity

Wellness as an industry is growing around the world. People embrace wellness in different ways including spas, workshops, therapies and ancient practises like yoga and meditation. In Geelong and The Bellarine there is an opportunity to tap into the allied health sector to support active recovery needs for people recovering from surgery. Corporate wellness is gaining importance and with the prospect of future conferences this represents another opportunity to explore.

Who are they

Passionate and active visitors who travel year-round for competitions such as triathlons, bike races and mountain climbing. Activities typically require spending on equipment.

Motivations

Highly competitive striving for personal best in tournaments.

The Geelong / Bellarine Experience

Activities:

Ocean swims, trail runs, triathlons, marathons, road races, golf and sailing are some of the activities in the region.

Destinations:

Drawcard events include Cadel Evans Great Ocean Road Race, the Ironman 70.3 and Festival of Sails.

Challenge

Restrictions with facilities in Geelong, connectivity with Avalon Airport and suitable accommodation for participants.

Opportunity

The opportunity to position the region as a year-round destination for sports brings the benefits of regular visitors and therefore help to address the fluctuations. Encourage longer stay pre and post event leveraging off mid level events rather than large scale. Opportunity for collaboration with other tourism regions to co-host events.

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APPENDIX

DEFINITIONS

Daytrip:
A daytrip is a visit to a place that occurs on one day but not the preceding or subsequent day. The way this was calculated differed depending on the data source. Tourism Research Australia defines a daytrip as “those who travel for a round trip distance of at least 50 kilometres, are away from home for at least four hours and do not spend a night away from home”. Through Human Movement Data it had to be calculated as any device that was not from the defined region, who visited the defined region on one day but not the preceding or subsequent day.

Human Movement Data:
Data that are aggregated by a central provider, in this case Near, which provides geospatial information about devices within a defined geofence, including time and place information on movement, estimated usual evening location and estimated usual daytime location.

For this report, HMD was taken from the 2018 and 2019 calendar years. This was primarily to give both an understanding as to the pre-covid “normal” movement patterns and spatial distribution of visitors to TGGB Tourism Region. Years before this were not used to give a sample of devices that remains consistent throughout the time period, as device counts changed significantly pre-2018.

Visitor Night:
A visitor night is a visit to a place that over multiple successive days. The way this was calculated differed depending on the data source. Tourism Research Australia defines a visitor night as a visit that “involves a stay away from home of at least one night, at a place at least 40 kilometres from home”. Through Human Movement Data it had to be calculated as any device that was not from the defined region, who visited the defined region on one day whilst also showing up in the same region on the next and / or previous day.

Tourism Research Australia Data:
Survey based information that is based on passenger responses to specific prompts including origin, destination, stopovers, purpose and activities of visit. The data are collected differently depending on the origin of the passenger. International data is predominantly aggregated using passenger processing systems at the airport. Domestic data is estimated using computer assisted telephone interviewing.

For this report TRA data was taken from the period between 2017 to 2019. This allowed for a pre-covid average that was not impacted by single year irregularities.

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** (and was updated 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 Priority Visitor Market Guide (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.

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