SUSTAINABLE TOURISM DESTINATION 10 YEAR MASTER PLAN

Prepared for Tourism Greater Geelong and The Bellarine

ACKNOWLEDGMENT OF COUNTRY

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

**Wadawurrung Country*

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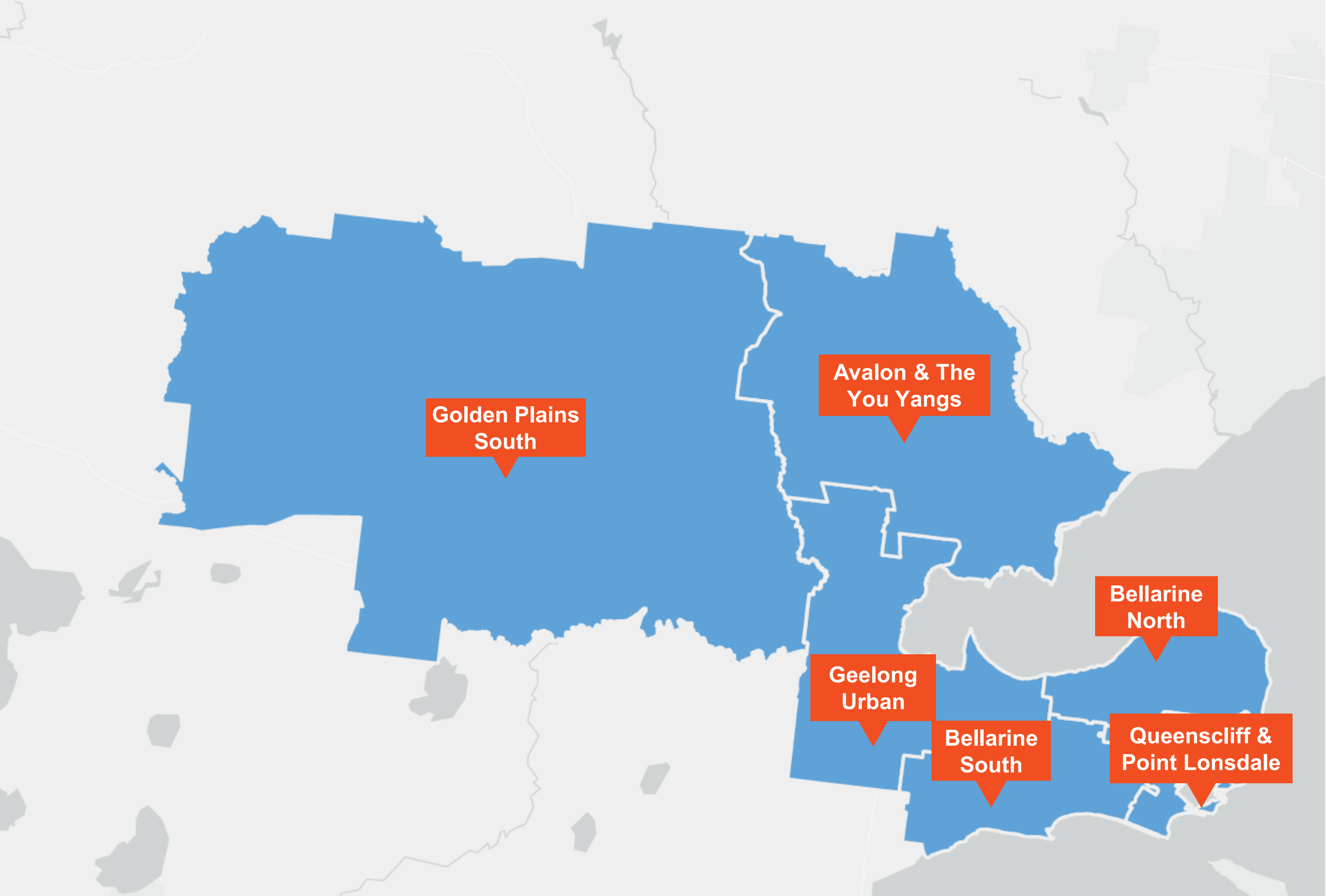
This report was issued in December 2022, with updates made in October 2023.

THE PURPOSE

Greater Geelong and The Bellarine is an active outdoor region, providing variety across sport and recreation pursuits, a diverse range of appealing food, beverage and producer experiences, and a growing range of quality Cultural experiences. Its sub regions are distinctive with high appeal and provide significant draw across multiple visitor markets.

The **purpose** of the Sustainable Destination Master Plan is to deliver on this vision by providing a stronger, more resilient visitor economy for the future through identifying key Strategic Directions and Priority Projects. To achieve this, 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 this Sustainable Destination Master Plan (SDMP).



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 in Greater Geelong and The Bellarine (the region). This DMP is consistent with Victoria's Statewide visitor economy priorities. In reviewing the draft DMP we have considered against the draft VEMP are comfortable that there is consistency.

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

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

EXECUTIVE SUMMARY

Our Vision:

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

The environments, culture and identity of Greater Geelong and The Bellarine Peninsula 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 Pre-Covid, 2019-20 financial year. Promoting the growth of this industry post-COVID will therefore have a far-reaching impact on the entire region.

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

10%
Of HMD[1] Visits from Interstate Visitors

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

62%
Overnight domestic visitors that stay in private accommodation

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

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

12.8M – 14.0M
Annual visit days in 2032 when combining daytrips and visitor nights

$1.9B – $2.1B
Visitors estimated spend in 2032

2,065
Commercial accommodation room demand increase between 2022 – 2032 in medium scenario

4,030 – 4,855
Additional direct jobs in the region to deliver on up to $1 billion of additional tourism spending

3,590
Additional workers in the tourism industry due to natural population and worker growth in the region

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

Geelong and The Bellarine will aspire to be a destination with strong growth in visitation driving spin-off benefits throughout 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 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.

To ensure these benefits are felt across the sub regions, targeted investment in accommodation and other infrastructure will be needed. It is expected that there will be an increase in demand for some 2,000 rooms, over the next 10 years. Whilst some of this will be met by the existing pipeline of supply, certain sub regions and typology of supply will need to be bolstered. Equally, there must be reasonable supply to capitalise on major events.

The forecast growth in visitor numbers requires being able to attract new or emerging markets. We have identified through consultation several growth markets for the region including culture enthusiasts, conference travellers, lifelong learners, wellness travellers, sustainable value travellers and active enthusiasts.

Growth in tourism visitation in the region will be met with significant increases in the demand for workers. It is expected that demand for workers will grow by between 4,030 and 4,855, however only 3,590 workers will be added to the labour force over this same period. As a result, strategies will be required to ensure workforce shortages (including up to between 1,100 – 1,500 in the Accommodation and Food Services industry alone) and skills shortages such as for retail workers and transport operators, are addressed.

This Sustainable Destination Master Plan provides a detailed analysis and guide to ensure the future potential of both the industry and the workforce is met.

A PLAN FOR THE FUTURE

The Sustainable Destination Master Plan provides a road map to deliver on the vision and create a robust and resilient tourism economy for the next ten years and beyond, for Geelong and The Bellarine.

For Geelong, given its larger civic role, significant investment is already underway, and is expected to continue in response to population growth and shifting demographics. For The Bellarine, it needs to preserve and grow consciously, mindful of the local communities and unique surrounds and its ability to leverage this through the development of diverse experiences and products.

Sustainability is at the forefront of all the directions proposed and forms a key consideration in the assessment of priority projects for the region and includes:

- Protecting the natural and sensitive environments
- Preserving Cultural heritage
- Encouraging development consistent with the character of each of the sub regions
- Levelling out visitation year-round
- Capturing new and emerging markets
- Being supported by a largely local workforce.

CREATING A SUSTAINABLE DESTINATION

In the context of delivering a sustainable tourism destination, four key considerations have formed the basis of the master plan, being the Environmental, the Social, the Cultural and the Economic factors, that when working together, can truly create a destination for the future. Each of these and their alignment to the UN Sustainable Destination Goals are detailed below.

THE ENVIRONMENT

Preserving the diverse environments will be critical for the future.

The region is home to a range of iconic landscapes that attract visitors year-round: The Bellarine Peninsula, Barwon River Parklands, You Yangs Regional Park, rural backdrops of the Golden Plains and outstanding coastal townships are our greatest natural assets.

In line with the UN Sustainable Development Goals, considering the Environment, the SDMP seeks to deliver on:

- Sustainable Cities and Communities
- Responsible Consumption and Production
- Climate Action
- Partnerships for Goals
- Life on Land and Below Water

THE SOCIAL

The region is rapidly growing with a transitioning economy toward population-driven sectors such as services, health, education, hospitality and importantly tourism.

The Community plays a significant role in advancing the future of the local visitor economy and continued social engagement will be an important part of this.

In line with the UN Sustainable Development Goals, considering the Social factors, the SDMP seeks to deliver on:

- Good health and well-being
- Sustainable Cities and Communities
- Responsible Consumption and Production
- Quality Education

THE CULTURAL

The Wadawurrung Traditional Owners provide the region with unique opportunities to create greater awareness including of nature-based and Cultural tourism and for these to form focus areas in the future.

Geelong is the economic and cultural hub of the region. As Australia's only UNESCO City of Design, future development outcomes should reference this criteria and importantly, this attribute should extend to and benefit The Bellarine.

In line with the UN Sustainable Development Goals, considering the Cultural factors, the SDMP seeks to deliver on:

- Reduced Inequalities
- Life on Land

THE ECONOMIC

The region is connected to visitors by road, rail, air and sea. With a growing population base and to grow the visitor economy, the pipeline of infrastructure and other investment projects are needed to take the region forward.

Investment in innovation, education and diverse accommodation, are also key aspects that will support growth in the visitor economy and derive a better future for both the community and visitors to the region.

In line with the UN Sustainable Development Goals, considering the Social factors, the SDMP seeks to deliver on:

- Quality education
- Decent work and economic growth
- Industry, innovation and infrastructure

PRIORITY PROJECTS ASSESSMENT FRAMEWORK

An important component of the Sustainable Destination Master Plan is to be able to translate the Strategic Directions into investment opportunities or priority projects for the region. A multi-criteria analysis (MCA) framework has been developed which supports the strategic objectives of the Sustainable Destination Master Plan and assists with the prioritisation of projects. The MCA assesses each project against 10 criteria, with projects assessed as high (3 points), medium (2 points), low (1 point) and no impact/not applicable (0 points).

Consistent with the direction of the SDMP, sustainability is at the core of the MCA. Five of the ten criteria, and therefore half of the maximum achievable score, are focused on prioritising projects which promote sustainable tourism in the region. This ensures each project must deliver across a range of sustainability considerations in order to be identified as a priority project for further consideration. The remaining criteria relate to a range of issues central to long term sustainable regional growth such as policy, infrastructure, accessibility, employment and collaboration. Furthermore, projects that amplify and support our designation as a UNESCO City of Design are also encouraged as they drive demand into the region, including international visitation.

Project Prioritisation Criteria	
Does this project promote sustainable tourism?	**Environment** Does the project protect natural sites and sensitive environments, biodiversity, minimise pollution, encourage sustainable business practices, encourage the adoption of low impact transport?
	Amenity and Character Is the project consistent with the local character and culture, preserves or improves amenity for all groups and limits degradation?
	Operation and Delivery Does the project propose to deliver sustainable practices in its day to day operation?
	Seasonality Does this project include strategies to mitigate impacts by managing visitor volumes, activities, and patterns of tourists?
	Preserve Cultural Heritage Does this project recognise the importance of Cultural assets and heritage accounting for the characteristics, capacity, and sensitivity of the site and reduces adverse impacts?
Does this project support sustainable regional growth?	**Transport** Does the existing or planned future transport network have the capacity to support this proposal? Does the proposal deliver an accessible outcome?
	Employment Does this provide a net positive employment outcome as well as create diversity in the workforce for the region?
	Partnerships Does this promote opportunities for partnership and collaboration? (i.e. industry, tour operators, accommodation and transport operators etc)
	Policy Alignment Is there strategic alignment with existing policy, including the Distinctive Area Landscape Policy and Australian Federation of Disability Organisations best practice?
	Target Markets Does this capture the aspirational target markets identified in the Sustainable Destination Master Plan?

These relate to environment & sustainability

TOP 10 DEMAND DRIVING PROJECTS

While there are a number of enabling infrastructure projects needed to be delivered, to capture the aspirational visitor markets and to make Geelong and The Bellarine a sustainable destination, the top 10 priority projects have been focused on those projects that will be demand driving for the region.

- 01 Wadawurrung Traditional Owners Cultural Experiences
- 02 5 Star Hotel in Central Geelong
- 03 Visitor Experience at You Yangs Regional Park
- 04 Development of Mineral Spa Facility
- 05 Experiential and Diverse Accommodation Options
- 06 Distinct Maker and Grower Experiences
- 07 Redevelopment of the Geelong Gallery
- 08 Queenscliff Harbour Eco-Tourism
- 09 Cruise Ship Infrastructure
- 10 Adventure Tourism Experiences

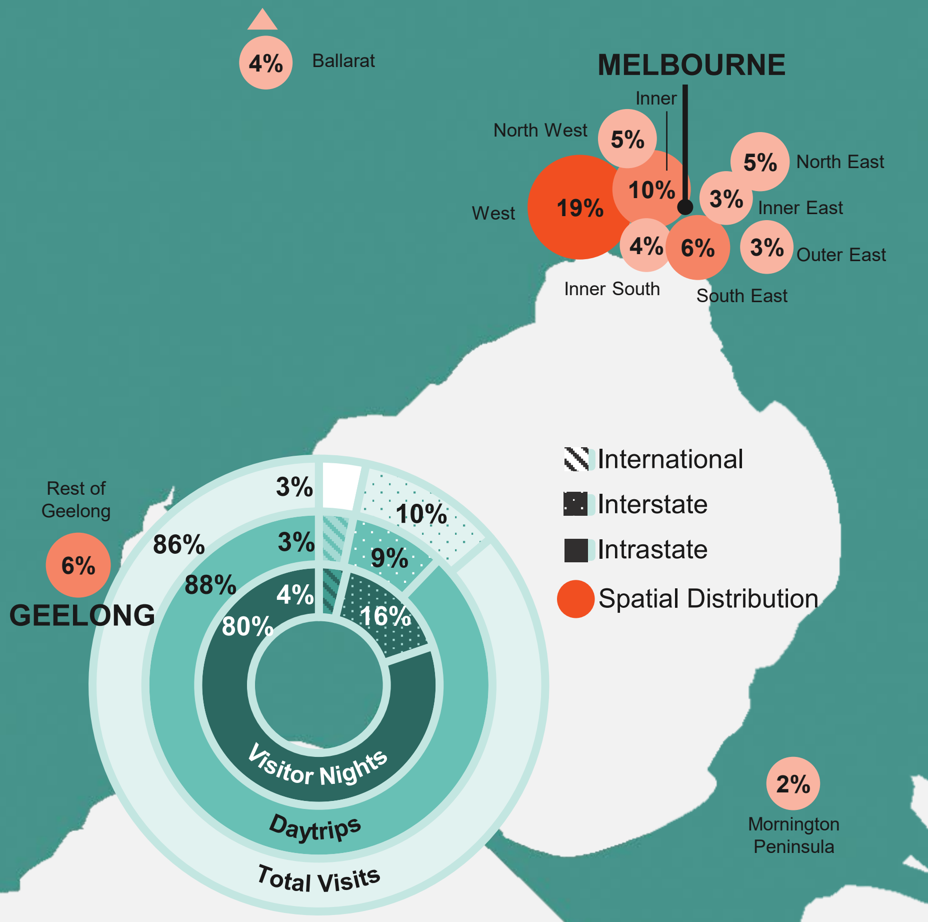
GEELONG & THE BELLARINE PROFILE

Analysis of the Greater Geelong and The Bellarine visitor market relied upon Human Movement Data (i.e., mobile phone activity) and Tourism Research Australia information to profile the historical visitation.

HUMAN MOVEMENT DATA

Using Human Movement Data (HMD), we can understand the different movement patterns for the various types of visitors to the region.

At 19%, most visitors to the region are coming from the growing West, largely visiting friends and family and for daytrips.



Source: Near (2017 and 2018)

4% Warrnambool and South West

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

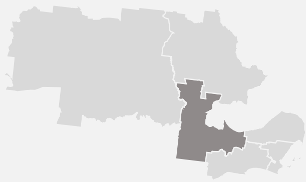
Tourism Research Australia data helps to understand the total visitor numbers by their origin, purpose of visit and the activities they undertake.

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.

Sub Regional Overview

GEELONG URBAN



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

Visitor Challenges

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

Type of Visitation (2017-19 Average)

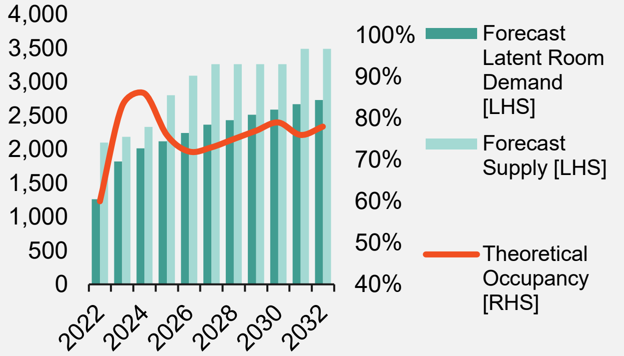
	Domestic Visitor Nights	1,800k
Purpose	Visiting Friends and Relatives	53%
	Holiday	22%
	Business	14%

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

	Daytrips	2,687k
Origin	Melbourne	66%
	Geelong & The Bellarine Balance	11%
	Great Ocean Road	5%

Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.
Source: TRA, STR; Urbis
**An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.*

Workforce Challenges

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

Estimated Tourism Employment	74%
Accommodation & Food Services	1,778
Retail Trade	882
Arts & Recreation Services	238

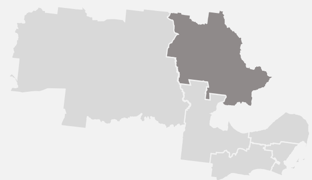
Geelong Urban is the dominant place of employment across all industry types, however, has a proportionally larger share of the following:

- Arts and museum services
- Education and training

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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



Sub Regional Overview

AVALON & THE YOU YANGS

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

Visitor Challenges

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

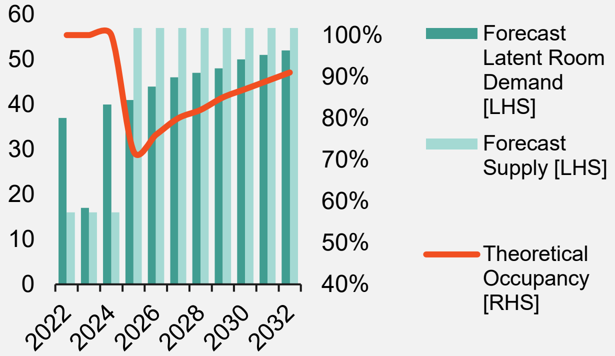
Promoting growth in domestic and international flights will need support from a transport connectivity perspective as well.

Type of Visitation (2017-19 Average)

Domestic Visitor Nights		**51k**
Purpose	Visiting Friends and Relatives	70%
	Holiday	11%
	Business	11%
International Visitor Nights		**14k**
Purpose	Visiting Friends and Relatives	63%
	Education	17%
	Holiday	12%
Daytrips		**281k**
Origin	Geelong & The Bellarine Balance	74%
	Melbourne	17%
	Great Ocean Road	3%

Source: TRA

Forecast Supply & Demand for Accommodation*



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

Workforce Challenges

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

Estimated Tourism Employment	6%
Accommodation & Food Services	126
Retail Trade	73
Transport, Postal & Warehousing	38

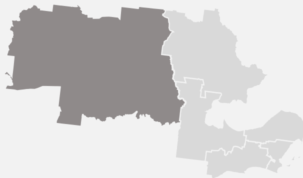
With the unique role and offerings of Avalon & The You Yangs, the region has a proportionally larger share of the following areas:

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

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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



Sub Regional Overview

GOLDEN PLAINS SOUTH

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

Visitor Challenges

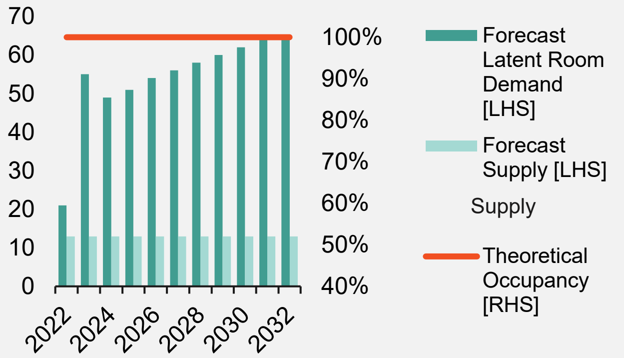
Golden Plains experiences relatively low visitation compared to the other sub regions. The area is predominantly rural, with its main visitor drawcards, for reasons other than visiting friends and relatives, being festivals and wineries. Accommodation options are also minimal, meaning most visitors are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

Type of Visitation (2017-19 Average)

Domestic Visitor Nights		**134k**
Purpose	Holiday	47%
	Visiting Friends and Relatives	47%
	Business	6%
International Visitor Nights		**5k**
Purpose	Holiday	45%
	Visiting Friends and Relatives	38%
	Business	17%
Daytrips		**106k**
Origin	Geelong & The Bellarine Balance	37%
	Melbourne	35%
	Great Ocean Road	15%

Source: TRA

Forecast Supply & Demand for Accommodation*



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

Workforce Challenges

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

Estimated Tourism Employment	2%
Accommodation & Food Services	45
Retail Trade	19
Transport, Postal & Warehousing	7

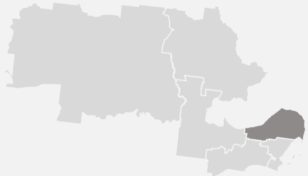
As part of the agri-tourism offer in the region, and with little high-volume accommodation, Golden Plains South has a proportionally larger share of workers in the following areas:

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

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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



Sub Regional Overview

BELLARINE NORTH

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

Visitor Challenges

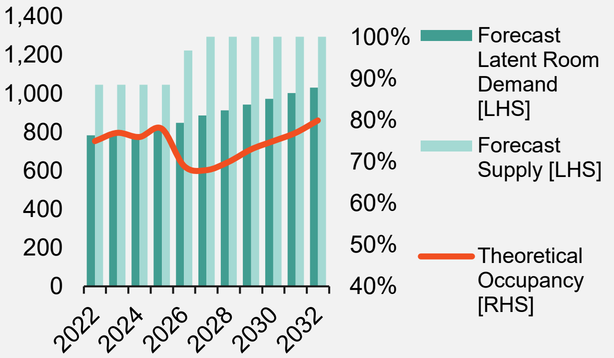
Bellarine North facilitates a wide variety of activities for its visitors. However, the issue of seasonality in beachside towns affect year-long use. Bellarine North also only hosts 107, 3-star and 4-star hotel rooms, despite the popularity amongst visitors indicating the sub region is an ideal holiday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

Type of Visitation (2017-19 Average)

	Domestic Visitor Nights	**621k**
Purpose	Holiday	69%
	Visiting Friends and Relatives	26%
	Other Reason	3%
	International Visitor Nights	**41k**
Purpose	Visiting Friends and Relatives	77%
	Holiday	22%
	Education	1%
	Daytrips	**300k**
Origin	Geelong & The Bellarine Balance	66%
	Melbourne	17%
	Great Ocean Road	3%

Source: TRA

Forecast Supply & Demand for Accommodation*



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

Workforce Challenges

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

Estimated Tourism Employment	**5%**
Accommodation & Food Services	138
Retail Trade	53
Arts & Recreation Services	20

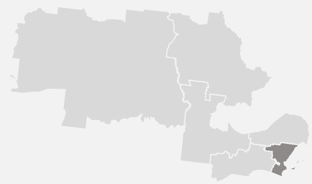
With a strong accommodation and recreation base, Bellarine North has a proportionally larger share of the following:

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

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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



Sub Regional Overview

QUEENSCLIFF & POINT LONSDALE

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

Visitor Challenges

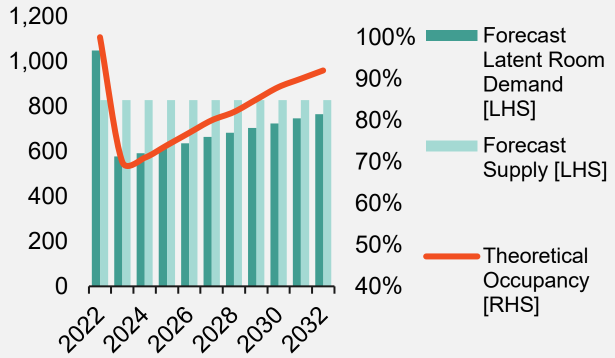
As with all sub regions within The Bellarine, transport, seasonality and accommodation are all key challenges for visitation. These sentiments were also highlighted by key business stakeholders in the sub region through various forms of engagement. Limited space alongside a high concentration of demand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

Type of Visitation (2017-19 Average)

	Domestic Visitor Nights	**446k**
Purpose	Holiday	79%
	Visiting Friends and Relatives	20%
	Business	1%
	International Visitor Nights	**11k**
Purpose	Visiting Friends and Relatives	52%
	Holiday	43%
	Education	4%
	Daytrips	**277k**
Origin	Melbourne	60%
	Geelong & The Bellarine Balance	21%
	Great Ocean Road	6%

Source: TRA

Forecast Supply & Demand for Accommodation*



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

Workforce Challenges

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

Estimated Tourism Employment	**3%**
Accommodation & Food Services	97
Arts & Recreation Services	21
Retail Trade	12

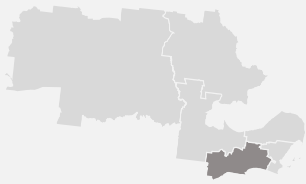
With unique services and offers in the region, Queenscliff and Point Lonsdale have a proportionally larger workforce relating to:

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

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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



Sub Regional Overview

BELLARINE SOUTH

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

Visitor Challenges

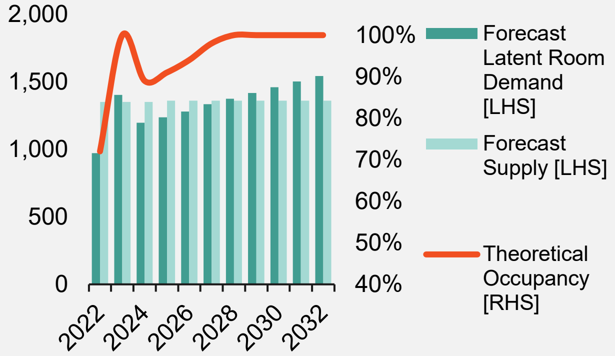
A major challenge for visitation in Bellarine South is seasonality. The HMD indicates that visitation is highest during the summer, while tapering during the colder months. Transport is also an issue in this sub region, with limited public transport offerings making it difficult to travel around without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

Type of Visitation (2017-19 Average)

	Domestic Visitor Nights	**710k**
Purpose	Holiday	65%
	Visiting Friends and Relatives	30%
	Business	4%
	International Visitor Nights	**39k**
Purpose	Visiting Friends and Relatives	87%
	Other Reason	5%
	Holiday	4%
	Daytrips	**327k**
Origin	Melbourne	73%
	Geelong & The Bellarine Balance	8%
	Great Ocean Road	6%

Source: TRA

Forecast Supply & Demand for Accommodation*



2022 and 2023 are actual figures, beyond this is a forecast using the typical distribution of Geelong and the Bellarine's tourists.
Source: TRA, STR; Urbis
**An occupancy percentage was applied to Caravan Park, and demand has been derived from percentage of holiday and business trips minus those who have private accommodation. Airbnb excluded.*

Workforce Challenges

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

Estimated Tourism Employment	**10%**
Accommodation & Food Services	316
Retail Trade	80
Arts & Recreation Services	41

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

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

Experience Gaps (Identified through engagement)

Current gaps in experience include:

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

WHAT WE HEARD THROUGH ENGAGEMENT

WHO WE HAVE SPOKEN WITH

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

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

The outcomes of this process have been used to inform the strategic directions for the region.

Stakeholders directly consulted included:

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

- Majority of accommodation in Central Geelong, gap on The Bellarine
- Limited facilities to capture business market
- Quality and type of accommodation limiting market draw
- Cultural precinct needs to be finished
- Insufficient commercial nature-based options that appeal to current markets
- Daytripper's go to The Bellarine or GOR and fewer to Geelong
- Lack of connectivity between the experiences in the region – need itineraries for each cohort
- Workforce shortage from external market reliance
- Developing precincts around key investment (i.e., hospitality & entertainment around The Spirit)
- Strong seasonality and weekend/ weekday troughs
- Tourism is more than just hospitality, as such broader consideration is needed
- Worker housing not affordable

THE CHALLENGES

The Challenges	Description
Seasonality	**Positioning as a year-round option** ▪ Seasonal nature of tourism undermines the ongoing financial sustainability of businesses ▪ The need to diversify the product for visitors with new experiences that are not season and weather dependent ▪ The importance of visitor dispersal to the sub regions
Workforce	**Critical component is getting access to a local workforce** ▪ Local residents look for better paying jobs outside the industry to deal with the cost of living, results in the loss of skills from the sector ▪ Broad trend of declining interest in tourism industry jobs as opportunities are seen as interim options and not career building or seen as a highly skilled profession ▪ Reliance on external markets (i.e. international students, backpackers etc) to fill jobs ▪ Inability to operate at capacity (opening for reduced hours/days) due to staff shortages
Costs	**Cost pressures have been mounting** ▪ High wage costs for businesses and worker availability has led to reduced capacity in the sector ▪ Cumulative losses and protracted lockdowns has created difficult business conditions ▪ Funding the high cost of preserving the natural environment for low value visitors
Sustainability	**Pressures on the workforce and environment is pronounced during peak periods (requires levelling)** ▪ Visitation is not all year round, which puts a strain on the industry during peak periods and limits activity during non-peak periods ▪ Limited public transport options for workers, visitors and residents, such as transport between Avalon Airport and Geelong ▪ The importance of managing visitation so it doesn't negatively impact the environment but importantly also contributes to improvements ▪ Gaining greater benefits from high volume, low value visitors, such as those from west Melbourne and likely visitor growth around transit transport hubs
Accommodation	**Shortage of accommodation for visitors and residents impacts the regions capacity** ▪ Lack of quality 4-5 star accommodation including near the airport and The Bellarine ▪ High accommodation costs makes it difficult to attract and retain workers in the tourism sector ▪ Lack of residential supply, which is important for supporting tourism employment ▪ Lack of experiential accommodation that acts as a drawcard ▪ Conversion of long term accommodation to short term rentals via Airbnb and other platforms reduces the supply of residential accommodation
Marketing	**The regions stories and experiences are not well known** ▪ The region lacks a unique selling proposition and it is not clear what makes it special and different ▪ The region's natural resources and Cultural assets are not being leveraged for commercial benefits ▪ There is a need for visitor experience propositions to target a high value visitor and activity packaging ▪ The Cultural heritage and unique stories of the Wadawurrung Traditional Owners have an opportunity to be communicated further.

FUTURE OUTLOOK

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

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

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

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

DEVELOPMENT ACTIVITY

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

Aug 2022

Wurriki Nyal | $220M
This civic precinct is newly completed and will include 2,600 sqm of new community spaces, a city office and customer service centre.

Oct 2022

Spirit of Tasmania | $135M
Recently opening its new home at Corio Quay, the Spirit of Tasmania is set to benefit the region, delivering more visitors on the doorstep of Central Geelong.

Apr 2023

Queenscliff Ferry Terminal - City Deal | $16M
This newly completed ferry terminal includes a café and bar, ticketing and retail area, toilets, kitchens and a passenger lounge. External improvements consist of a new boardwalk and redesigned carpark, as well as upgraded pedestrian and disability access.

2024

South Geelong - Waurn Ponds Rail Duplication | $1B
Currently underway to accommodate strong population growth, stages 2 and 3 will see the duplication of 8 km of the Geelong rail line, upgrades to South Geelong and Waurn Ponds stations along with also improving the 400m South Geelong tunnel bottleneck.

2025-2027

You Yangs Masterplan | $11M
In alignment with the aspirations of Wadawurrung Traditional Owners, the masterplan includes options to upgrade the visitor information centre, car parks, picnic and BBQ areas along with the existing tracks and trails to support greater visitation by 2025.

Jul 2026

Convention & Exhibition Centre | $294M
The new Geelong Convention and Exhibition Centre is anticipated to include a 200-room luxury hotel and commercial spaces, 1,000 seat plenary venue and 3,700 sq.m of multi purpose space when completed in July 2026.

Aug 2023

Geelong Arts Centre – Redevelopment | $140M
Funded by the Victorian Government, the upgraded centre features three performance spaces: a 500-seat theatre which can expand to accommodate up to 800 patrons, a 250-seat theatre and a black box theatre. Additional amenities include dining spaces, an improved box office, new administration facilities and an outdoor atrium. Completed in August 2023.

Late 2023 – Early 2024

GMHBA Stadium Redevelopment | $142M
The stage five redevelopment of GMHBA stadium will significantly increase capacity to host over 40,000 people on completion in 2023. The stadium 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.

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.

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.

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

DEVELOPMENT ACTIVITY DRIVING VISITOR GROWTH

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

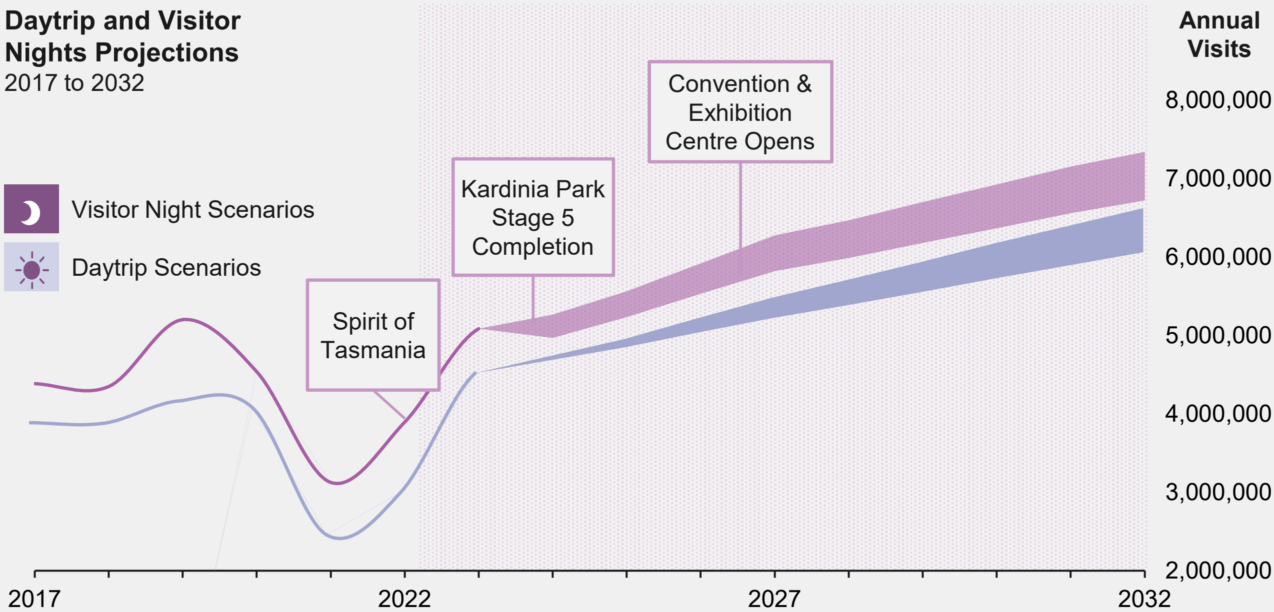
With significant investment in projects such as the Spirit of Tasmania, the Geelong Convention and Exhibition Centre and a bolstered cultural precinct, the region will see higher levels of visitation across the next ten years and beyond. Furthermore, the proximity to Melbourne, the supply of additional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

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

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

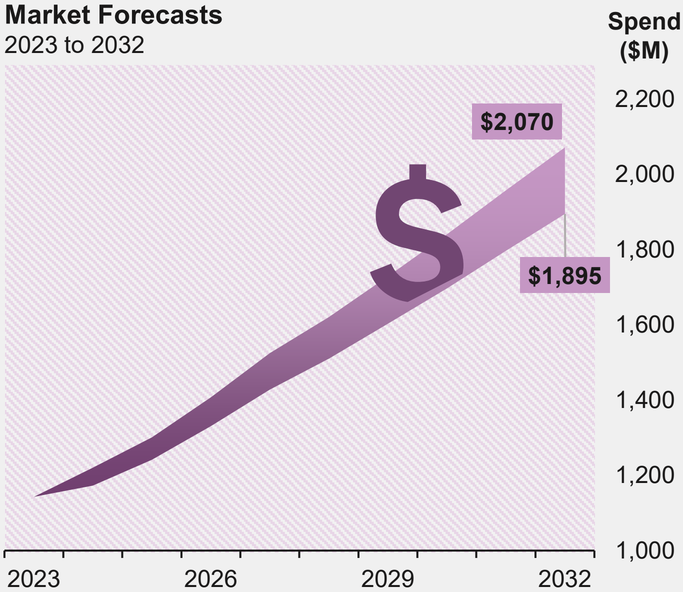
Tourism will re-emerge as a dominant contributor to the economy over the next 10 years, spurred on by known investment and further enhancement of the regions offers.

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.

VISITOR GROWTH MEANS A LARGER WORKFORCE IS NEEDED

DEMAND FOR WORKERS

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

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

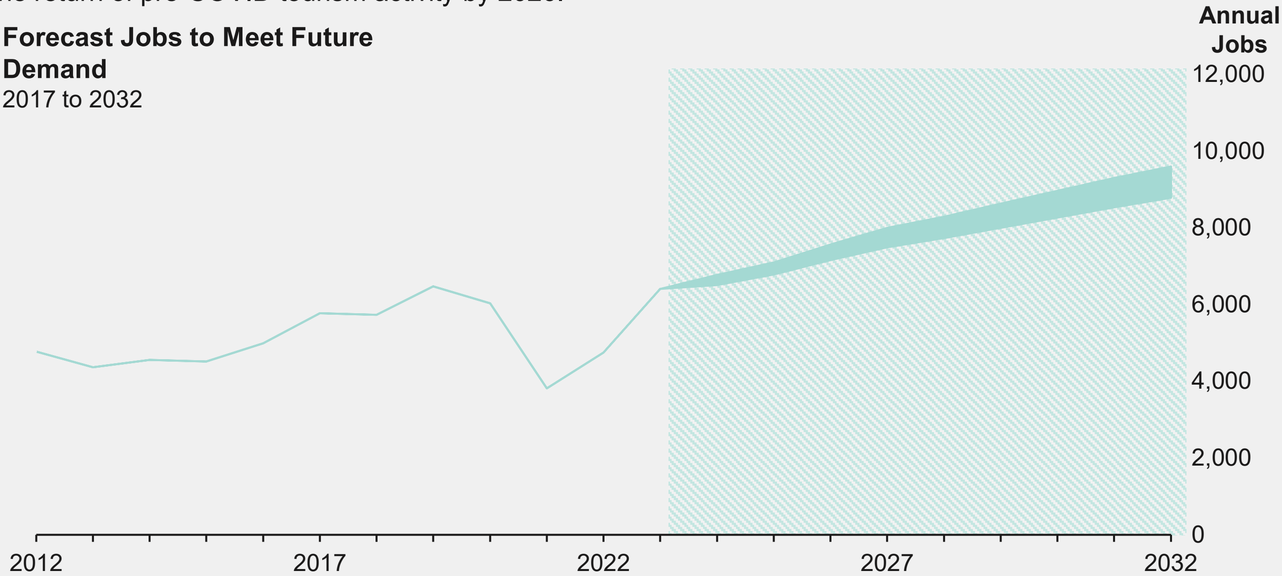
COVID-19 has seen a shift in the spending profile for the region, shifting away from education toward accommodation, food, retail and arts and culture. It is expected that this spending will normalise with the return of pre-COVID tourism activity by 2026.

Future demand for jobs has therefore been forecast to grow:

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

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

Forecast Jobs to Meet Future Demand
2017 to 2032



Source: REMPLAN, ABS, TRA, Urbis.

SUPPLY OF WORKERS

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

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

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

Estimated Tourism Allocation – 2032
Allocation using modified 2019, 2021 and 2023 REMPLAN benchmarks

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

Source: REMPLAN, ABS, Victorian Government, TRA, Urbis. Rounded to nearest 10

INDUSTRY NEEDS TO 2032

Tourism in Greater Geelong and The Bellarine is expected to return quickly back to its pre-pandemic state and then grow by a further $1.1 billion more in annual tourism spend. To do so, the industry will need to ensure that the demand for workers is met by the needed supply and skills.

By comparing the local labour force in the tourism industry to the demand for workers, the relative supply of workers in 2032 into tourism has been calculated.

The key outcomes of this analysis are:

- The total number of tourism workers needed in the region in 2032 is between 8,780 and 9,600 depending on a baseline or high-growth scenario.
- Without intervention, the total workforce gained locally is estimated to be 8,190.
- Across most industries, there will be a shortage of workers without further effort into workforce growth including re-training and upskilling.

Adjacent demonstrates the level to which each industry is anticipated to face a shortage, based on the local workforce. Notably, the key investment and growth areas of Accommodation and Food Services, Retail Trade and Arts and Recreation Services will be in shortage across the region. Even within industries that are expected to be fully supplied with workers, it is anticipated that there will be skill mismatches.

While business as usual growth is anticipated to lead to issues in the supply of workers, and hence an inability of the region to reach its full potential, the following opportunities are present over the next ten years to increase supply:

- Better improve participation in the workforce of at-risk and unemployed locals. This includes those in youth unemployment and minority groups.
- Increase the proportion of workers in each industry that want to and are supported in working in the tourism sector.
- Encourage pathways to transition for older workers or workers wishing to change careers.
- Create clear pathways and courses through secondary and tertiary education that cater to the varied industry and workforce needs.

These will not only improve tourism outcomes but have flow-on community benefits.

Without a sustainable and suitable workforce development strategy, the tourism industry will not be able to fulfil its potential in the region.

Demand and supply in 2032

Legend: Baseline / High tourism

	Baseline – Locally Supplied	Baseline – Shortage	High tourism – Locally Supplied	High tourism – Shortage
Accommodation & Food Services	4,210 (LS)	-995	4,600 (LS)	-1,390
Retail Trade	2,060	-225	2,250	-415
Services	850	Nil	930	Nil
Arts & Recreation Services	800	-180	880	-255
Transport, Postal & Warehousing	610	Nil	670	Nil
Manufacturing	150	Nil	165	Nil
Wholesale Trade	75	Nil	85	Nil
Agriculture, Forestry & Fishing	15	Nil	20	Nil

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

SKILLS NEEDS TO 2032

Considering employment by industry does not capture the full extent of workforce needs over the next 10 years, it is just as important that the skills needed to support the growth of the industry are known, so that expected shortages can be alleviated.

By benchmarking the occupations within each industry in the region, the skills required and supplied have been estimated. This has informed the table below, which demonstrates the skills shortages in 2032 across the region and particular skills required in each sub-region.

Notably, across the 15 most acute skills shortages, over 75% relate to accommodation and hospitality workers. This is a result of their demand across industries and the differences between local supply and workforce demand. It is important that over the next 10 years there is effort put into ensuring a pipeline of workers across basic skills (such as hospitality workers) all the way through to managers, as all of these are needed to deliver an effective tourism offer.

Top 15 Skills Shortages	Geelong Urban	Bellarine South	Bellarine North	Queenscliff	Avalon & You Yangs	Golden Plains South
Hospitality Workers	●	●	●	●	●	●
Sales Assistants and Salespersons	●	●	●	●		
Food Preparation Assistants	●	●	●			
Food Trades Workers	●		●		●	●
Accommodation and Hospitality Managers	●	●	●	●	●	●
Retail Managers	●	●	●			
Cleaners and Laundry Workers	●	●	●	●	●	●
Checkout Operators and Office Cashiers	●	●	●		●	
Sports and Fitness Workers	●	●			●	●
Horticultural Trades Workers		●	●		●	●
Receptionists	●	●	●	●	●	●
Arts Professionals	●	●		●		
Freight Handlers and Shelf Fillers	●			●	●	●
Hospitality, Retail and Service Managers	●	●	●	●	●	●
Media Professionals	●					


OPEN

FUTURE TARGET MARKETS

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 such as the Geelong Gallery upgrade, Geelong Convention and Exhibition Centre and the GMHBA Stadium redevelopment 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. They are looking for experiences that reward them with personal growth and achievement.

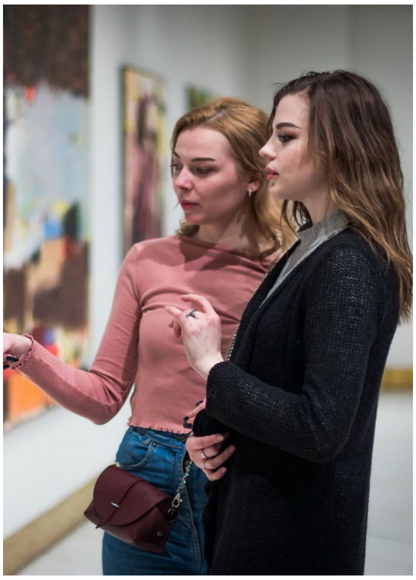
Six personas adjacent have been identified as an opportunity to engage experience driven and high value visitors leveraging existing assets, future investment and the development of new product experiences. Each persona are seeking experiences which are underpinned by sustainability credentials - from experiences 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.

To provide the tourism industry with a guide on when to activate each persona, timeframes are indicated to reflect the best time to unlock that opportunity, whether it be short (0-3 years), medium (3-5 years) or long term (5-10 years). These timeframes are based on when supporting infrastructure will be in place to support.

A qualitative assessment of the potential impacts of increased visitation by persona types have been 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 that are not the core purpose of the visit.

From this, Cultural Enthusiasts, Conference Travellers and Active Enthusiasts represent the top 3 focus areas, with Wellness Travellers closely following.




FUTURE TARGET MARKETS

Market	Timeframe	Description	High Value	Advocacy	Flow On Spend
Cultural Enthusiasts	0 -3 Years	Catalytic projects including the Geelong Arts Centre and upgrades to Geelong Gallery will deliver cultural assets to the region of exceptional quality. Important Cultural and Community assets like the art, stories and practises of the Wadawurrung Traditional Owners should be front and centre.	High	Med - High	Med - High
Conference Travellers	3 -5 Years	Being a conference city unlocks opportunities for businesses broadly, and not only for the Conference and Exhibition Centre and hotels. Organisers want to build local experiences into the program, and attendees are seeking inspiration to extend stays. There is much to gain if the region has destinations and activities that showcase the unique local appeal.	High	Low	Medium
Active Enthusiasts	0 -3 Years	The opportunity to position the region as a year-round destination for sports brings the benefits of regular visitors in all seasons and leverages the region's natural environment. Activities could include ocean swims, trail runs, triathlons, marathons, road cycling races, sailing or team sport. The local allied health sector and Deakin University's sports and allied teaching areas offer synergies.	Med - High	Medium	Med - High
Wellness Travellers	3-10 Years	The wellness industry is growing around the world. People embrace wellness in different ways including spas, workshops, therapies, ancient practises like yoga and meditation or simply open green spaces for healing. The concept is increasingly embraced by people of all ages as an antidote to a hectic life and as such there is a large audience.	High	High	Med - High
Lifelong Learners	3 -5 Years	This persona is relevant to those who are looking for destinations to visit where they can combine a getaway with personal growth activities. This can be learning something new, physically challenging themselves, or developing a new interest.	Medium	Low	Low
Gourmet Travellers	0 -3 Years	Epicurean tourism is a major visitor growth industry, particularly in scenic rural areas like those of the Geelong and Bellarine region. Gourmet travellers immerse themselves in gastronomic food and wine production endemic to the region. This group values authentic paddock to plate experiences, focused on sustainable agricultural production along with high end dining and accommodation options.	High	High	Med- High

STRATEGIC DIRECTIONS TO 2032


PAT and
STICK'S

STRATEGIC DIRECTIONS
DRIVING VISITOR GROWTH

Improvement within the tourism sector, including through infrastructure and services upgrades, will allow the region to build and strengthen its competitive positioning, diversify and grow its target markets and ultimately reach the forecast visitor growth expected for the region. The reason for visiting the region is diverse and shaped by a range of smaller and larger destinations.

Using the gaps and opportunities identified through the stakeholder feedback, global, interstate and intrastate trends, competitive positioning and a review of the key investment areas in the pipeline, **Five Strategic Directions** to maximise the visitor outcomes for the region have been identified. Each Strategic Direction and its objective are described below. These Strategic Directions allow for the regions tourism industry to thrive in a sustainable, community-inclusive and high-value way and will address all seven of the Strategic Directions identified in the Visitor Economy Master Plan Directions Paper.

01 Advance Liveability
Improve amenity and liveability across Greater Geelong and The Bellarine through revitalising urban Geelong.

02 Ignite Sport, Recreation and Wellness
Develop a sophisticated network of accessible sports, health and wellness offerings to leverage a history of, and future with sports and health in the region.

03 Transform Access and Network Connections
Deliver transformational infrastructure and wayfinding initiatives to let people see more of the region.

04 Unlock Outdoor & Nature Based Activation
Leverage and improve the open and natural environments of Greater Geelong and The Bellarine and acknowledge Wadawurrung Country to allow more tourists and locals to engage with its natural beauty.

05 Excel In Innovation & Design Focused On Sustainability
Incorporate a long and celebrated history of great design and innovation to make Geelong a vibrant, accessible, forward-looking and sustainable destination of choice.

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

IMPLEMENTING THE ACTIONS

Any action is only as good as ensuring a realistic implementation plan is put in place. Each of the actions identified across the Five Strategic Directions, have been assessed under a Deliver, Partner or Advocate platform, as explained below. Furthermore, an indicative timeframe for each has also been identified.

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

Platform	
Deliver	Projects that Tourism Greater Geelong and The Bellarine would manage and deliver directly.
Partner	Projects that Tourism Greater Geelong and The Bellarine will deliver in conjunction with the Wadawurrung Traditional Owners, local and state agencies, land-owners, community groups and other relevant stakeholders.
Advocate	Private land that can be optimised to deliver public benefit and further precinct activation.

Timeframe		
Short term	0-3 years	◔
Medium term	3-5 years	◑
Long term	5-10 years	●

ACTIONS AND IMPLEMENTATION

No.	Action	Deliver	Partner	Advocate
1. Advance Liveability				
1.1	Support the objectives of the Revitalising Central Geelong Plan, Central Geelong Action Plan and Central Geelong Framework Plan		●	●
1.2	Enhance Geelong Waterfront through broader dining options and improved connection to the waterfront and arts precinct.			●
1.3	Encourage a nightime economy through a series of events and creation of sub-precincts. Review trading hours.			●
1.4	Encourage and support outdoor activities including growth in the breadth and range of facilities and cross-generational options.			●
1.5	Support new markets through investment activity in leisure travel, product promotion and greater access to administrative services.	●		●
1.6	Encourage greater flexible space options, with required infrastructure (power, seating), and sustainability initiatives (solar power) for mini events and pop ups.		●	●
1.7	Investigate better connectivity between locals and visitors through 'live like a local' tours, citizen science and trained volunteers.		●	●
1.8	Create a walkable and accessible central city with links to key areas (i.e., arts and cultural precinct, Kardinia Park, Waterfront, retail core, Eastern Beach).			●
1.9	Encourage an improved range, scale and quality of accommodation options and seek to fast-track planning.			●
1.10	Support improved in innovative/digital wayfinding.			●
1.11	Support affordable housing options to encourage workforce retention.			●
2. Ignite Sport, Recreation and Wellness				
2.1	Grow the sphere of influence of sports pursuits through coaching and training opportunities and grow allied services.			●
2.2	Use icon sporting events to build year-round visitation by linking with the annual calendar for arts/cultural programs.		●	
2.3	Enhance key sporting infrastructure through attractive and frequent transport options, ensure seamless integration of all facilities balance competing uses, partner with accommodation and transport operators to extend the visit.			●
2.4	Grow the range of other sporting facilities such as accessible, female friendly, regional indoor and soccer.		●	●
2.5	Grow the health and wellness (both physical and mental) appeal by creating a cluster of products/packages and identifying key site opportunities.			●
2.6	Review market capacity and opportunity for mineral bathing.			●
2.7	Ensure accommodation meets different requirements and aligns with the character of each sub region.			●
2.8	Leverage the landscape through a shared network of trails.			●
2.9	Create allied health opportunities and link to University/course programs.			

Timeframe

◔	**Short term**	0-3 years
◑	**Medium term**	3-5 years
●	**Long term**	5-10 years

Stakeholders[1]	Timing
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Precinct	Short Term
Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia	Short Term
Tourism Greater Geelong & The Bellarine, Geelong City Council, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, volunteer groups, local businesses	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, developers	Medium/Long Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, affordable accommodation providers	Short Term/Long Term
Tourism Greater Geelong & The Bellarine, local event organisers, schools, local business	Short Term
Tourism Greater Geelong & The Bellarine, sub regional councils, sporting event organisers, arts/culture stakeholders	Short/Medium Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Trust	Short/Medium/Long Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	Medium/Long Term
Tourism Greater Geelong & The Bellarine, key stakeholders, developers	Medium/Long Term
Tourism Greater Geelong & The Bellarine, hydrogeologist, sub regional councils	Short/Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils, key developers	Short/Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils	Short/Medium Term
Tourism Greater Geelong & The Bellarine, local businesses, universities, health providers	Short/Medium Term

ACTIONS AND IMPLEMENTATION

No.	Action	Deliver	Partner	Advocate
3. Transform Access and Network Connections				
3.1	Build visitor precincts around Avalon and Spirit of Tasmania to maximise spend and encourage overnight stays. Create a positive sense of arrival and create better connections to Central Geelong and the sub regions.			●
3.2	Extend the current usage of swing mooring options for cruise ships and tendering ashore for shore-based excursions			●
3.3	Create contemporary travel options such as low carbon footprint, promote accessibility, shared pathways with signage and ensure road safety.			●
3.4	Re-visit transport needs as tourism grows to make sure transport can service the region.			●
3.5	Align transport outcomes with the G21 Transport Strategy – i.e., reduce car dependency, improve accessibility and encourage a climate neutral transport system.			●
3.6	Capture wider cross regional touring markets through marketing (e.g., GOR, Great Southern Touring Route).	●		
4. Unlock Nature Based Tourism				
4.1	Develop a program with the Wadawurrung Traditional Owners to grow engagement.			●
4.2	Align with strategic documents such as the You Yangs Master Plan and the Wadawurrung Healthy Country Plan.			●
4.3	Feature the outdoor/ natural environment to target key markets such as food and wine, those seeking remote adventure, recovery-based health and wellness products.			●
4.4	Provide diverse experiential accommodation options drawing on nature, such as glamping.			●
4.5	Engage and immerse in nature (experiential food, family friendly and inclusive parks, mini events – yoga/meditation, art classes, citizen science).		●	●
4.6	Giving back through increasing the ability of visitors to engage in flora and fauna monitoring.			●
5. Excel in Innovation & Design Focused on Sustainability				
5.1	Encourage recycling for the region through localised collection stations and the use of citizen science.		●	●
5.2	Work with the local industry to build the reputation and delivery of more contemporary sustainability through tourism.		●	●
5.3	Build leading partnerships to promote sustainability – Wadawurrung Traditional Owners, educational institutions, review existing programs.		●	●
5.4	Re-position the region to feature sustainable development principles as a core element of all work to safeguard open spaces and natural resources.	●	●	

Timeframe

◔	**Short term**	0-3 years
◑	**Medium term**	3-5 years
●	**Long term**	5-10 years

Stakeholders[1]	Timing
Tourism Greater Geelong & The Bellarine, Avalon Airport, Geelong Port, Spirit of Tasmania, City of Greater Geelong, State Government, G21	Short to Long Term
Tourism Greater Geelong & The Bellarine, State Government authorities	Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils	Short Term
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Department of Transport	Medium to Long Term
Tourism Greater Geelong & The Bellarine, G21	Medium to Long Term
Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia	Short Term
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners	Short Term
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional Councils	Medium Term
Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders	Short to Medium Term
Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders	Short to Medium Term
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies,	Short Term
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies, universities	Short Term
Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies	Short Term
Tourism Greater Geelong & The Bellarine, local businesses, sub regional councils	Short Term
Tourism Greater Geelong & The Bellarine, sub regional councils, key stakeholders, universities, TAFE, private colleges	Short to Medium Term
Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies, Visit Victoria, Tourism Australia	Short to Long Term

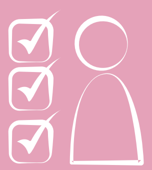
STRATEGIC DIRECTIONS
DRIVING WORKFORCE GROWTH

With the tourism workforce unable to support the expected growth in visitation over the next 10 years under a 'business as usual' scenario, there is an impetus for action to develop the workforce in a meaningful and directed manner. To achieve a sustainable workforce development strategy, consideration was given to both the size of the workforce required, and the means by which the workforce is integrated and part of the broader community.

Using the gaps and opportunities identified through the stakeholder feedback, global, interstate and intrastate best-practice, detailed consideration of the workforce forecast data and a review of the key needs in the pipeline, **Four Strategic Directions** have been crafted to maximise the workforce outcomes for the region. Each Strategic Direction, its objective and the role of TGGB are described below. Together, the Strategic Directions should see the regions tourism workforce thrive in a sustainable, community-inclusive and high-value way by addressing key issues of workforce shortfalls, skills needs and engaging underutilised segments of the population.

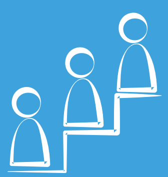
01 Retaining a local workforce
Support a workforce that lives, works and is a pivotal part of the local community.

Role in Delivery: TGGB to partner and advocate for local housing solutions, support community buy-in and ensure opportunities for naturalisation into the Geelong and Bellarine community.



02 Creating careers
The Geelong and Bellarine region's tourism industry will become one where tourism is a career, not just a job.

Role in Delivery: TGGB to market, advocate and partner to demonstrate the career opportunities in tourism for all people of all ages and life stages.



03 Delivering skills to support the industry
Creating a training and skills ecosystem that ensures all key skills needed for a thriving tourism industry are provided to employees who need it. This includes providing opportunities to employees and building the capability of employers to support career development opportunities.

Role in Delivery: TGGB to partner and advocate for renewal and innovation in training and education.

04 Collaborating to get the best of industry
Growing a network of businesses, education institutions, stakeholders and workers that collaborate across the region to maximise tourist offerings.

Role in Delivery: TGGB to facilitate discussion, collaboration and program development across the Greater Geelong and The Bellarine Region both directly and through partnerships.

IMPLEMENTING THE ACTIONS

Any action is only as good as ensuring a realistic implementation plan is put in place. Each of the actions identified across the Four Strategic Directions, have been assessed under a Deliver, Partner or Advocate platform, as explained below. Furthermore, an indicative timeframe for each has also been identified.

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

Platform

Deliver	Projects that Tourism Greater Geelong and The Bellarine would manage and deliver directly.
Partner	Projects that Tourism Greater Geelong and The Bellarine will deliver in conjunction with the Wadawurrung Traditional Owners, local and state agencies, land-owners, community groups and other relevant stakeholders.
Advocate	Private land that can be optimised to deliver public benefit and further precinct activation.

Timeframe

Short term	0-3 years	◔
Medium term	3-5 years	◑
Long term	5-10 years	●

ACTIONS AND IMPLEMENTATION

No.	Action	Deliver	Partner	Advocate
1. Local workforce retention				
1.1	Encouraging more workers to stay and work locally by partnering with community, university and industry to encourage migrant flows and local employment.		●	●
1.2	Provide solutions to housing and accommodation such as opening university housing out of term to key workers to minimise cost-of-living pressures on workers.			●
1.3	Develop a sustainable housing pipeline for workers and community, ensuring that there are community and industry benefits to living and working in the region.			●
2. Creating careers				
2.1	Express the opportunities available in the region to engage and employ unemployed or underutilised segments of the community including unemployed youth, older residents and First Nations people.	●	●	●
2.2	Collate and align tourism opportunities to expectations, including demonstrating the unique value proposition of working in the industry and creating full-time, stable jobs.	●	●	
2.3	Support grassroots, community-based career training that integrates tourism as a valuable aspect of the community.	●	●	●
3. Delivering skills to support the industry				
3.1	Connecting relevant stakeholders and businesses together to ensure that cross-regional and cross-industry opportunities and needs are understood and met.	●	●	
3.2	Ensure relevant training and development pathways exist by engaging stakeholders, institutions and people.		●	
3.3	Catalyse and develop a diverse set of career pathways and training to support the whole industry, from specialists to entry-level opportunities and everything in between.		●	●
4. Collaborating for the best outcome				
4.1	Establish communication channels and forums to ensure regular and meaningful touchpoints are undertaken and maintained.	●	●	
4.2	Facilitate broader engagement and collaboration opportunities, especially for benefits that can be sourced outside-of-region and during off-season time periods.		●	●
4.3	Maintain and further develop existing goodwill between all stakeholders to allow for maturity and continuous development in the opportunities, skills and networks that tourism workers and operators can leverage.	●	●	●

Timeframe

◔	**Short term**	0-3 years
◑	**Medium term**	3-5 years
●	**Long term**	5-10 years

Stakeholders[1]	Timing
City of Greater Geelong, Universities, TAFE, Tourism Greater Geelong & The Bellarine, Federal government	Short Term
Community groups, Tourism Greater Geelong & The Bellarine, local businesses, Geelong Chamber of Commerce, State and Federal government	Medium Term
Community groups, TGGB, local businesses, Geelong Chamber of Commerce, State and Federal government, affordable accommodation providers, various councils, G21, Department of Transport	Long term
Tourism Greater Geelong & The Bellarine, Geelong Chamber of Commerce, Visit Victoria, Victoria Tourism Industry Council, international tourism agencies, Federal Government, Tourism Australia, international partner universities, multinational firms within Geelong	Short Term
Tourism Greater Geelong & The Bellarine, Geelong Chamber of Commerce, Visit Victoria, National Skills Commission, employment agencies, counter-seasonal tourism destination, local operators	Medium Term
Universities, TAFE, Department of Education and Training, Geelong Chamber of Commerce, Visit Victoria, Tourism Greater Geelong & The Bellarine	Long term
Tourism Greater Geelong & The Bellarine, sub regional Councils, Visit Victoria, National Skills Commission, employment agencies, TRA, Universities, TAFE, youth employment providers	Short Term
Tourism Greater Geelong & The Bellarine, Universities, TAFE, Department of Education and Training, Geelong Chamber of Commerce	Medium Term
Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	Long term
Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups	Short Term
Wadawurrung Traditional Owners, Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	Medium Term
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups, sub regional Councils, sub regional employers	Long term

PRIORITY PROJECTS FOR THE REGION

DEMAND DRIVING PROJECTS

No.	Project Name	Description
1.	**Wadawurrung Traditional Owners Cultural Experiences**	Support and promote the Wadawurrung Traditional Owners to produce a Cultural tourism plan for key Cultural attractions across the region. Create opportunities to educate, create trails and providing information, share stories and showcase the natural environment in a sustainable way.
2.	**5 Star Hotel in Central Geelong**	Advocate for a new 5 star, internationally branded hotel, for Central Geelong to increase the luxury offer and enhance the profile of Geelong. Capture new visitors to the region including those visiting the improved arts precinct and convention centre.
3.	**Visitor experience at You Yangs Regional Park**	Support the implementation of the You Yangs Master Plan to upgrade the existing cultural and natural assets and visitor facilities at the You Yangs Regional Park to meet current and future visitor demand.
4.	**Development of Mineral Spa Facility**	Support and advocate for the City of Geelong and State Government to deliver a mineral spa centre through a private developer. Mineral hot springs and wellness is one of the fastest growing visitor attractions, particularly in Victoria. This could include along the Eastern Beach at Geelong's waterfront or the investigation of potential for alternate sites across the region through a hydrogeology study.
5.	**Experiential and Diverse Accommodation Options**	Work with accommodation providers to increase the mix of options, while ensuring they celebrate the character of the region. Through more diverse accommodation, such as, cabins, farm-stays, experiential, glamping and boutique stays, the region can capture diverse markets with flow on effects to spending more generally.
6.	**Distinct Maker and Grower Experiences**	The opportunity is to diversify the food, wine, spirits and brewery experience, elevating the region and showcasing the local produce. This can also 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).
7.	**Completion of the Arts and Cultural Precinct, including Geelong Gallery**	The State Government is currently redeveloping the Geelong Arts Centre and Little Malop Street area, which will create a vibrant new precinct and bolster the arts scene in the region. The Art Gallery is a critical part of this precinct.

Location	Rationale	Priority Visitor Markets
Across the region	Cultural heritage and the role of the Traditional Owners is important to the identity of the region and also an important draw for visitors.	Cultural Enthusiasts Lifelong
Central Geelong	Increase the luxury accommodation to appeal to a range of new visitor markets and leverage off investment into new major attractions (i.e. Arts Centre, GCEC)	Conference Travellers Gourmet Travellers Cultural Enthusiasts
You Yangs Regional Park	Support the capacity of the Park to attract visitors and celebrate the natural and cultural assets of the region.	Cultural Enthusiasts Active Enthusiasts Wellness Travellers
Central Geelong	Opportunity to enhance the broader wellness offer of the TGGB region, attract visitors in one of the fastest growing visitor markets in Australia and further enhance the destination appeal of the Geelong Waterfront.	Wellness Travellers
Bellarine	Ensure a wide diversity of accommodation options that respond to the visitor needs.	Broad visitor market All priority visitor markets
Across the region	Significant opportunity to showcase the breadth and depth of food and beverage experiences across the region.	Broad visitor market
Central Geelong	Arts and cultural activity is a key attractor for visitors to the region and can also support growth of the broader arts and culture activities for visitors across the region. It will also appeal to aspirational visitors markets.	Cultural Enthusiasts Conference Travellers

DEMAND DRIVING PROJECTS

No.	Project Name	Description
8.	**Queenscliff Eco-Tourism**	Support initiatives to create an eco-tourism attraction at Queenscliff which increases the visitor offer and potential dwell time.
9.	**Cruise Ship Infrastructure**	Working in partnership with Geelong Ports and Victoria Ports, seek opportunities to leverage and capitalise on a growing cruise ship market by utilising existing infrastructure. Seek to deliver a private cruise ship operator to the Geelong and the Bellarine region.
10.	**Adventure Tourism Experiences**	Opportunity for a high adrenaline (e.g. aerial ropes, sky park) and diverse tourist attraction to draw new markets into the region. Includes supporting and advocating for the development of the former Boral Cement Works and Quarry in Waurn Ponds to include, as part of the broader mixed development, cultural tourism and adventure experiences; as well as the Geelong Adventure Park expansion in Wallington.
11.	**Expansion of Wellness Experience Cluster**	Identify key sites across the region that can be developed and have a wellness link, creating a destination for both tourism and the community. Promote and support the growth of the existing small cluster of wellness experiences and day spas around the Point Lonsdale area, leveraging the projected strong growth of the wellness tourism market.
12.	**Serendip Sanctuary Upgrades**	Promote investment into the Serendip Sanctuary to develop the facility and expand the eco-tourism offer. This will assist in reaching to broader markets, including school groups and broader markets interested in the unique natural environs.
13.	**Enabling Trails Network**	Support the development of an enabling trails network across the region to promote walking, cycling, e-bikes and scooters. Create visitor experiences along the trails, linking visitor destinations and providing supporting infrastructure for tourists. This includes the connections to The Bellarine Rail Trail.
14.	**Development of Regenerative Agri-Tourism Product**	Broaden the range of activities and align this with potential growth markets. These include regenerative agri-tourism, pet friendly activities, saltwater wellness, accessible experiences and active marine experiences (i.e. snorkelling).

Location	Rationale	Priority Visitor Markets
Queenscliff	Additional activities at the Harbour will increase visitation and dwell time.	Broad visitor market Cultural Enthusiasts Active Enthusiasts
Port Philip	Deliver a new destination for visitors to the region, whilst also improving community access and preserving sensitive environments along the peninsula.	Broad visitor market Cultural Enthusiasts Active Enthusiasts
Various locations (incl. Waurn Ponds)	High adrenaline and adventure attractions are popular visitor facilities and also increase draw of the family visitor market.	Active Enthusiasts
Across the region Queenscliff & Point Lonsdale	Wellness tourism is one of the fastest growing visitor markets in Australia.	Wellness Travellers
Serendip Sanctuary	Support the capacity of the Park to attract visitors and celebrate the natural and cultural assets of the region.	Cultural Enthusiasts Active Enthusiasts Wellness Travellers
Across region	Ensure the active trails network provides an exciting experience for tourists.	Wellness Travellers Active Enthusiasts
Various locations (incl. Waurn Ponds)	High adrenaline and adventure attractions are popular visitor facilities and also increase draw of the family visitor market.	Active Enthusiasts

DEMAND DRIVING PROJECTS

No.	Project Name	Description
15.	**Marine Active experiences (snorkel and food)**	Broaden the range of activities and align this with potential growth markets. These include regenerative agri-tourism, pet friendly activities, saltwater wellness, accessible experiences and active marine experiences (i.e. snorkelling).
16.	**Restoration of Queenscliff Sea Baths**	The restoration of the original Victorian era hot sea baths is an opportunity to create a unique attraction and drawcard for Queenscliff.
17.	**Fyansford Papers Mills Precinct Redevelopment**	Support and promote the planned upgrade of the Fyansford Paper Mills Precinct which will increase the capacity for arts and cultural activities in the historic paper mills buildings. Ensure the activities align with the priority visitor markets and are integrated in to a regional arts and culture tourism offer.
18.	**Pet-friendly Accommodation and Experience**	Broaden the range of activities and align this with potential growth markets. These include regenerative agri-tourism, pet friendly activities, saltwater wellness, accessible experiences and active marine experiences (i.e. snorkelling).
19.	**Saltwater Experience Development**	Broaden the range of activities and align this with potential growth markets. These include regenerative agri-tourism, pet friendly activities, saltwater wellness, accessible experiences and active marine experiences (i.e. snorkelling).
20.	**Museum of Motoring and Industry**	Relocation of the museum to continue to celebrate the history of motor vehicles and the motor industry. A new location and building will ensure high-amenity spaces that are attractive to a broad market, including for education and cultural tourists.

Location	Rationale	Priority Visitor Market
Various locations	High level investigation into visitor growth markets.	Broad visitor market All priority visitor markets
Queenscliff	Provide a unique destination, add the sub region to the visitor itinerary and grow visitation.	Broad visitor market Wellness Travellers Cultural Enthusiasts Active Enthusiasts
Fyansford	Upgrade will increase the number of tenants on site and visitor draw.	Cultural Enthusiasts Gourmet Travellers Lifelong Leaners
Various locations	High level investigation into visitor growth markets.	Broad visitor market All priority visitor markets
Various locations	High level investigation into visitor growth markets.	Broad visitor market All priority visitor markets
Location to be determined	Continue to provide a cultural asset that celebrates the region’s unique history with the motor industry.	Broad visitor market Cultural Enthusiasts Lifelong Leaners

ENABLING INFRASTRUCTURE

No.	Project Name	Description
1.	**Connectivity to Avalon Airport**	Advocate for improved public transport access to Avalon Airport including the long term rail link between Avalon Airport and the Melbourne-Geelong line.
2.	**Connecting the Spirit to the Region**	Encourage greater focus on visitor amenity, and sense of arrival. Create clear and safe connections into Central Geelong for vehicle and non-vehicle movement. Support improvements to road infrastructure as well as better connections and wayfinding along the waterfront all the way into Central Geelong. Provide passive transport options such as e-bikes to encourage movement along the waterfront.
3.	**Avalon Airport Precinct Development**	The long term expansion of Avalon Airport including the surrounding precinct to include a hotel, retail and other uses will help support growth in passenger numbers and capture new markets. Expansion of Avalon airport's offer will support growth of interstate and international visitors to region.
4.	**Industry Led Training Programs**	Advocate for targeted training programs which aligns skills with the workforce needs for the tourism sector across the region. Advocate for development of industry led training programs: • Tour guiding • Nature based tourism • Indigenous tourism • Wine tourism
5.	**Improved Regional Bus Service Network**	Advocate for improved bus services between Lara and Waurn Ponds, Colac to Geelong via Winchelsea, direct services between Geelong and Queenscliff and services between Geelong and Torquay. These have been identified as key missing links for visitors travelling in the region.
6.	**Improve In-Park Facilities**	Support accommodation providers to access funds to enhance facilities in caravan parks, such as communal bathrooms, amenities, kitchens, play spaces etc.
7.	**Cruise Ship Port Infrastructure**	Advocate for a feasibility study into a cruise ship port near Geelong, potentially at Point Henry. This could increase the Geelong's capacity for cruise ships and further visitor markets.
8.	**Revival of Rail Line between Bannockburn and Geelong**	Advocate for the revival of the train line between Bannockburn and Geelong for passenger use. This could be used to promote visitor experiences along the rail line and provide a unique visitor journey.

Location	Rationale
Avalon Airport	Avalon Airport is a major gateway for international and interstate visitors to the region.
North Geelong	Deliver a better experience for passengers from an amenity and connectivity perspective. Encourage linkages between the port and Central Geelong.
Avalon Airport	Support growth of interstate and international visitor markets in the region.
Whole region	Improve skills and training in priority tourism sectors.
Across region	Provide better connectivity, reduce the reliance on private vehicles and make it easier for visitors to see the region.
Across the region	Ensure that caravan parks provide high quality visitor amenities.
Geelong	Increase capacity for cruise ships to Geelong which has flow on effects to visitation and spending across the region.
Golden Plains South	Opportunity for a unique visitor journey via rail that could showcase the attractions of the Golden Plains South region.

ENABLING INFRASTRUCTURE

No.	Project Name	Description
9.	**Bellarine Link Extension**	Support the construction of The Bellarine Link as part of the Geelong Ring Road Extension from the Geelong Ring Road to The Bellarine Peninsula (connecting Baanip Boulevard to Portarlington Road). This would reduce travel time between Geelong Ring Road and The Bellarine Peninsula for both vehicles and bicycles.
10.	**Duplication of Barwon Heads Road (Phase 2)**	Support the duplication of the Barwon Heads Road (Phase 2) to support long term traffic growth, enhance safety and use by cyclists.
11.	**Duplication of the Midland Highway to Bannockburn**	The duplication of the Midland Highway to Bannockburn will improve the accessibility and safety of visitors to the region.
12.	**Lethbridge Airport expansion**	Upgrade Lethbridge Airport's facilities and infrastructure to increase its offer of light aircraft activities for tourists. This also aligns with providing more adventure tourism opportunities.
13.	**Geelong Underground Rail Network**	A subterranean rail network which would begin at Geelong train station, connect to Westfield and Geelong hospital, including the future Barwon Women's and Children's Hospital and nearby medical facilities before terminating at South Geelong. The Geelong proposal would add an additional 2-3km of track under the CBD

Location	Rationale
Geelong and Bellarine	Enhanced connectivity to The Bellarine Peninsula.
North Bellarine, South Bellarine	Barwon Heads Road is major entry route for The Bellarine Peninsula.
Golden Plains South	Enhanced connectivity between Golden Plains South and Geelong.
Golden Plains South	Increased visitor activities such as joy flights and skydiving.
Geelong	Underground rail connection would allow for greater connection to central Geelong and mitigate the reliance on private vehicles.

MASTER PLANS

No.	Project Name	Description
1.	**Kitjarra-dja-bul Bullarto langi-ut Project**	Support and promote the Kitjarra-dja-bul Bullarto langi-ut project which aims to enhance recreation opportunities, public access and environmental values along the lower Moorabool and Barwon Rivers.
2.	**Master Planning of the Portarlington Holiday Park**	Support a proposal to diversify the accommodation mix at the Portarlington Holiday Park by converting existing caravan park space to accommodate other types of accommodation, such as, hard accommodation, beach pods and cabins to be able to capture broader markets and assist with flattening out occupancy across the year.
3.	**Preparation of the Kardinia Park Master Plan**	Support and advocate an upgrade to the region's largest stadium, including connection to the surrounding precinct. Develop a master plan that seamlessly integrates all facilities, and balances competing needs from the different levels of sport and maximises the potential of the precinct. This will increase the offer of major sporting and entertainment events and grow visitor numbers.
4.	**Preparation of the Western Beach Master Plan**	Support the City of Greater Geelong to develop the Western beach master plan, creating an extension of the eastern beach corridor and aligning with investment in the Convention Centre development. Maximise appeal and broaden the visitor itinerary of activities in the Geelong CBD area.
5.	**Support Bellarine Bayside Foreshore Management Camping and Accommodation Strategy**	Support the implementation of The Bellarine Bayside Coast Management's Camping and Accommodation Strategy which aims to diversify the accommodation offer and improve visitor experience to the foreshore reserves between Portarlington and St Leonards.
6.	**Implementation of the National Wool Museum 30 Year Master Plan**	Support and advocate the National Wool Museum's plans to significantly expand its offer and become 'a museum of and for Geelong'. This will significantly broaden the offer of the museum to a wider visitor base and create a new cultural tourism destination.

Location	Rationale	Priority Visitor Markets
Barwon Heads	Enhance an important cultural and environmental asset of the region.	Active Enthusiasts Cultural Enthusiasts Lifelong Learners
Portarlington	Capture broader markets and mitigate the impacts of seasonality.	Broad visitor market
Central Geelong	Opportunity to grow the offer of major sporting and entertainment events to visitor markets.	Cultural Enthusiasts Conference Travellers
Central Geelong	The master plan is a significant opportunity to add to the destination appeal and visitor activities of the Geelong CBD.	Broad visitor market Cultural Enthusiasts Active Enthusiasts Lifelong Leaners Conference Travellers Gourmet Travellers
Bellarine	Enhance the accommodation offer and visitor experience of foreshore camping reserves on The Bellarine.	Broad visitor market
Geelong	Expand the cultural offer within the region via a new museum experience.	Broad visitor market Cultural Enthusiasts Lifelong Leaners

APPENDIX

Tourist Demand and Supply Analysis

Tourist Demand and Supply of Accommodation or Workers Summary
All Figures are Forecast and Rounded

Demand, Medium Scenario *Year to*	**Jun-22**	**Jun-23**	**Jun-24**	**Jun-25**	**Jun-26**	**Jun-27**	**Jun-28**	**Jun-29**	**Jun-30**	**Jun-31**	**Jun-32**
						Visitors (000)					
Day-trippers	3,010	4,520	4,740	4,900	5,100	5,300	5,470	5,640	5,820	6,000	6,170
Domestic Overnight[1]	1,340	1,640	1,560	1,610	1,660	1,700	1,750	1,790	1,840	1,880	1,930
International Overnight	10	40	50	60	70	80	80	80	80	90	90
Total Visitors	**4,360**	**6,200**	**6,350**	**6,570**	**6,830**	**7,080**	**7,300**	**7,510**	**7,740**	**7,970**	**8,190**
						Visitor Nights (000)					
Domestic Overnight[1]	3,800	4,410	4,400	4,540	4,710	4,910	5,050	5,200	5,350	5,500	5,630
International Overnight	100	680	760	910	1,080	1,200	1,260	1,330	1,390	1,460	1,510
Total Visitor Nights	**3,900**	**5,090**	**5,160**	**5,450**	**5,790**	**6,110**	**6,310**	**6,530**	**6,740**	**6,960**	**7,140**
Daytrips + Visitor Nights	**6,910**	**9,610**	**9,900**	**10,350**	**10,890**	**11,410**	**11,780**	**12,170**	**12,560**	**12,960**	**13,310**
						Visitor Spend ($M)					
Daytripper's	$270	$430	$470	$490	$520	$560	$590	$630	$670	$710	$750
Domestic Overnight	$540	$650	$670	$710	$750	$800	$850	$900	$950	$1,000	$1,050
International Overnight	$10	$60	$70	$80	$100	$120	$130	$140	$160	$170	$190
Total Visitor Spend	**$820**	**$1,140**	**$1,210**	**$1,280**	**$1,370**	**$1,480**	**$1,570**	**$1,670**	**$1,780**	**$1,880**	**$1,990**

[1] Due to the variability of the domestic overnight data, a 3-year rolling average has been used historically.

Supply *Year to*	**Jun-22**	**Jun-23**	**Jun-24**	**Jun-25**	**Jun-26**	**Jun-27**	**Jun-28**	**Jun-29**	**Jun-30**	**Jun-31**	**Jun-32**
						No.					
Beds[2]	5,070	5,160	5,380	6,080	6,280	6,510	6,510	6,510	6,510	6,510	6,510
Workforce	4,740	6,410	6,690	6,980	7,390	7,770	8,030	8,330	8,620	8,910	9,180

[2] Stock that is heavily seasonal such as campsites and un-serviced private rentals have had occupancy percentages applied to them.

COVID-19 AND THE POTENTIAL IMPACT ON DATA INFORMATION

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

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

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

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

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

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

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

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

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

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

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

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

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

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