DESTINATION MASTER PLAN

Prepared for Tourism Greater Geelong and The Bellarine.

September 2022

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.

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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.

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ACKNOWLEDGMENT OF COUNTRY

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

**Wadawurrung Country*

CONTENTS

GEELONG AND
THE BELLARINE

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

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

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

6.4M
visitors in 2019

60%
of all visits were spent in Geelong

87%
From Intrastate

3%
from International

19%
from Melbourne's West

10%
from Interstate

Bellarine South receives
21%
of Intrastate Visitor Nights

62%
of domestic visitors stay in private accommodation

Most day trips are to Geelong Urban at
68%

Source: Tourism Research Australia, Near; Urbis

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 10.7 to 13.6 million visit days in the region by 2032. These visitors are likely to spend between $1.6 and $2.1 billion in total, which will be a large addition to the local economy.

In order to ensure these benefits are felt across the sub regions, there will need to be targeted investment in accommodation and other infrastructure to support growth. It is expected that around 2,200 accommodation spaces will be required by 2032. 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 withstand major events like the Commonwealth Games in 2026.

Growth in visitor numbers requires being able to attract new or emerging markets that are becoming more prevalent inside and outside of the region. Personas such as culture enthusiasts, conference travellers, lifelong learners, wellness travellers, sustainable value travellers and active enthusiasts are not currently being well-serviced by the tourism offers of the region.

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 2,600 and 4,325, however only 2,450 workers will be added to the labour force over this same period. As a result, significant work will be required to ensure workforce shortages (including up to 1,225 in the Accommodation and Food Services industry alone) and skills shortages such as for retail workers and transport operators will be filled.

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

10.7M – 13.6M

Annual visit days in 2032 when combining daytrips and visitor nights.

$1.6B – $2.1B

Visitors estimated spend in 2032.

2,200

Additional rooms or camping spaces demanded in the next 10 years

2,600 – 4,325

Additional direct jobs in the region to deliver on up to $1billion of additional tourism spending

2,450

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

DESTINATION MASTER PLAN

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 offers a growing range of quality Cultural experiences.

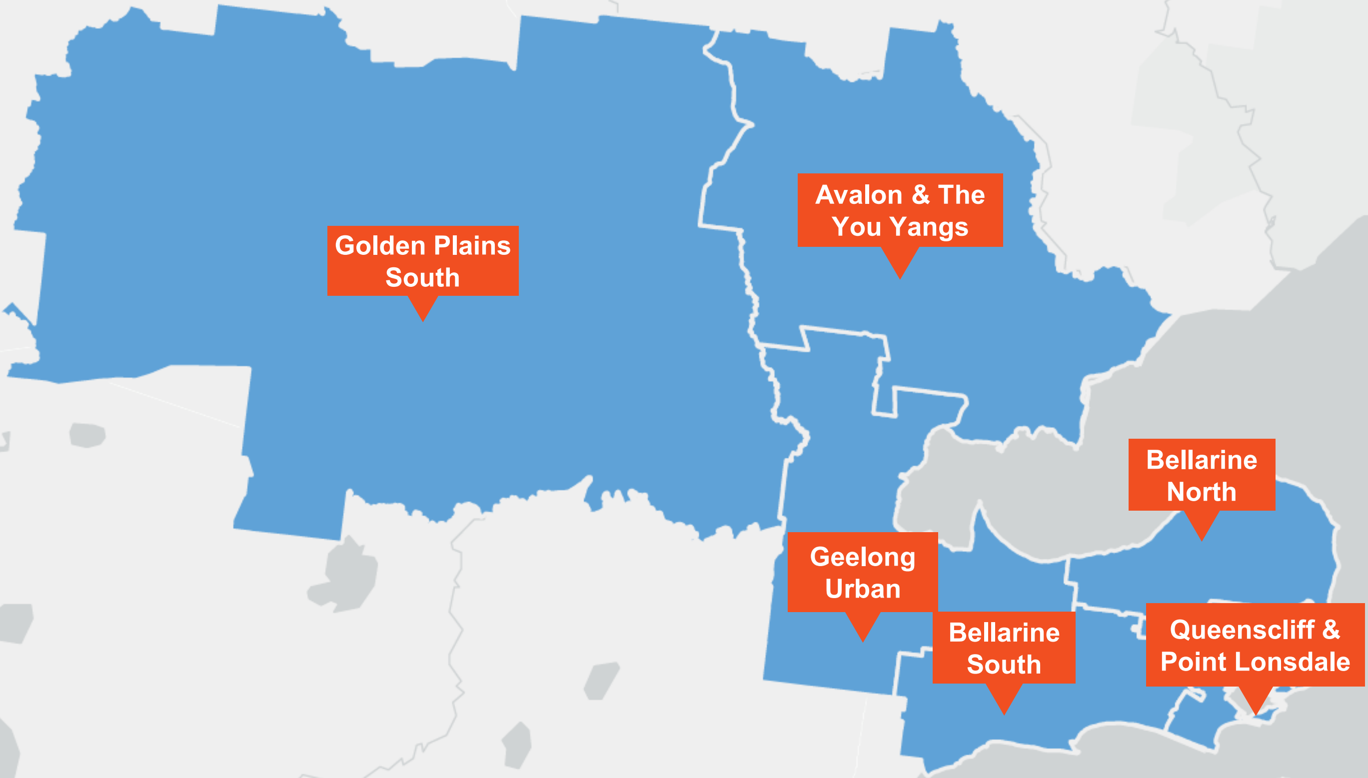
Its sub regions are distinctive with high appeal and provide significant draw across multiple visitor markets.

The Purpose of the Destination Master Plan is to deliver a stronger, more resilient visitor economy for the future through identifying key Strategic Directions and Priority Projects. 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 Destination Master Plan (DMP).

Vision:

*"The DMP will reinforce Greater Geelong and the Bellarine **as Victoria's premier tourism region** and ensure it realises the exceptional growth potential to 2032. From city to beach, from farm to nature, Greater Geelong and the Bellarine will provide a **unique and distinctive year-round regional offer** to established and emerging markets.*

*The DMP is a roadmap to **deliver sustainable, balanced growth** for the tourism sector, underpinned by a skilled workforce and delivering investment to derive strong economic, environmental and social benefits to the region."*



The **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).

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

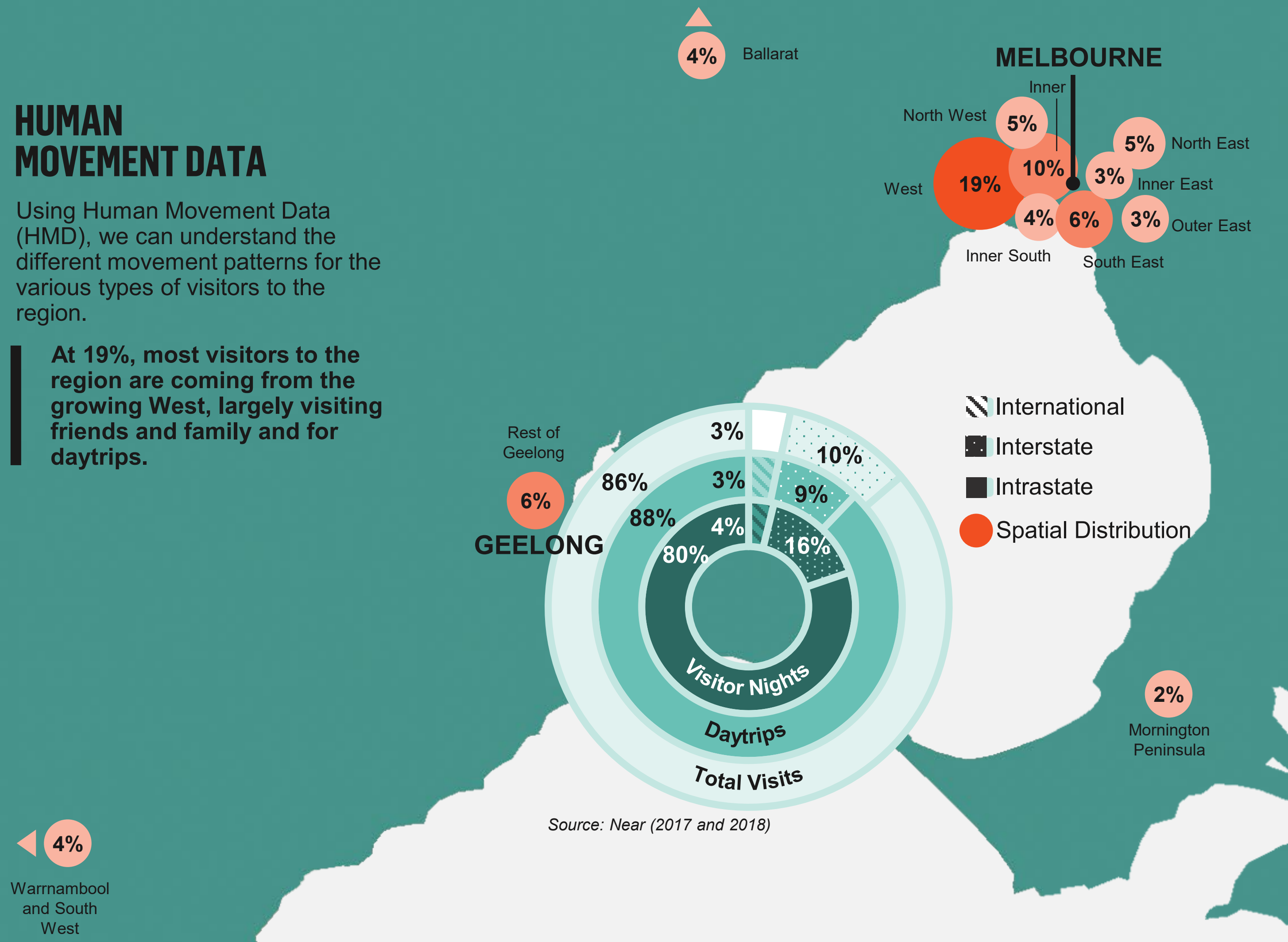
GEELONG & THE BELLARINE PROFILE

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)

TOURISM RESEARCH AUSTRALIA DATA

Daytrips

3.98 Million
Ave. Daytrips
2017-19

Dom. Visitor Nights

1.49 Million
Ave. Visitor Nights
2017-19

Int. Visitor Nights

0.59 Million
Ave. Visitor Nights
2017-19

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

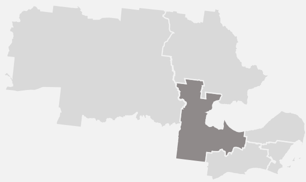
Tourism Research Australia data helps to understand the total visitor numbers by their origin, purpose of visit and the activities they undertake.

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 5.7 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.

Type of Visitation (2017-19 Average)

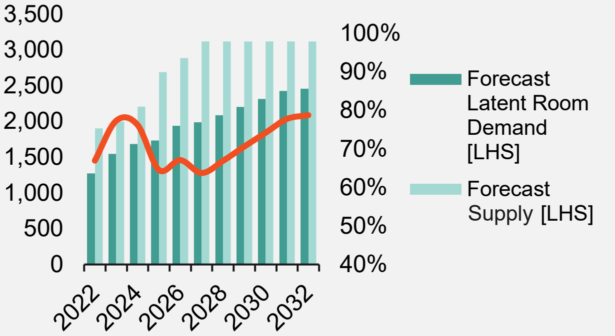
	Domestic Visitor Nights	1,800k
Purpose	Visiting Friends and Relatives	53%
	Holiday	22%
	Business	14%

	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*



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

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	78%
Accommodation & Food Services	1,153
Retail Trade	763
Arts & Recreation Services	167

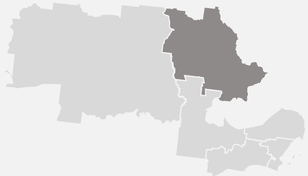
Geelong Urban is the dominant place of employment across all industry types, however, has a proportionally larger share of the following:

- Arts and museum services
- Education and training
- Health care and social assistance
- Administrative and support services

Experience Gaps

Current gaps in experience include:

- 5-star accommodation
- Broader dining options and events at the Waterfront
- Annual events calendar using existing infrastructure
- Conferencing/Business events



Sub Regional Overview

AVALON & THE YOU YANGS

The Airport is clearly the greatest attractor, followed by the You Yangs National 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

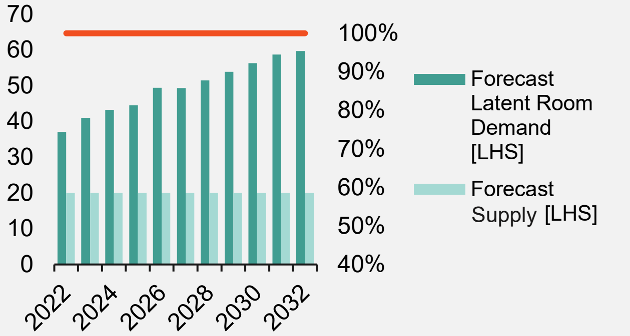
Avalon & The You Yangs has very few accommodation options, however many are visiting You Yangs National Park for a daytrip. The presence of Avalon Airport and its potential to drive visitation to the broader region should not be understated. Promoting growth in domestic and international flights will need support from a transport connectivity perspective as well as the potential for accommodation options.

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*



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

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 in this area 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 historical low supply in the region.

Estimated Tourism Employment	4%
Accommodation & Food Services	49
Retail Trade	41
Arts & Recreation Services	20

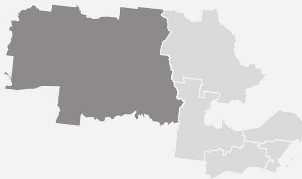
With the unique role and offerings of Avalon & The You Yangs, the region has a proportionally larger share of the following areas:

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

Experience Gaps

Current gaps in experience include:

- Transport links into Central Geelong
- Transit/short term accommodation



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 developing tourism infrastructure.

Type of Visitation (2017-19 Average)

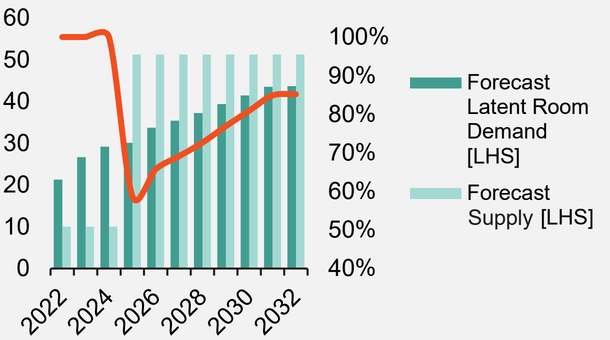
	Domestic Visitor Nights	134k
Purpose	Holiday	47%
	Visiting Friends and Relatives	47%
	Business	6%

	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*



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

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	21
Retail Trade	13
Agriculture, Forestry & Fishing	10

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

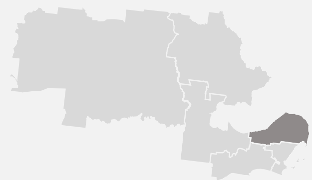
Experience Gaps

Current gaps in experience include:

- Short term accommodation
- Transport links
- Greater nature based tourism

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)

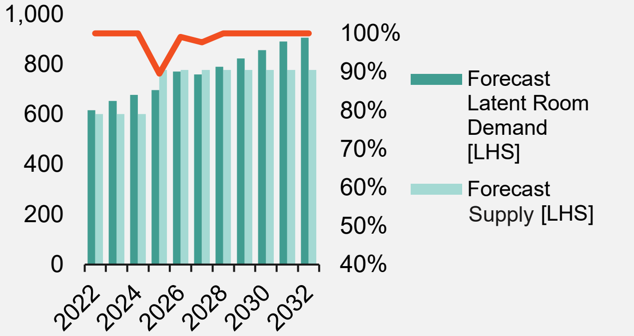
Domestic Visitor Nights	621k
Purpose	
Holiday	69%
Visiting Friends and Relatives	26%
Other Reason	3%

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*



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

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	4%
Accommodation & Food Services	77
Retail Trade	32
Arts & Recreation Services	10

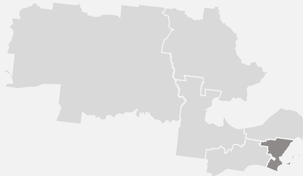
With a strong accommodation and recreation base, Bellarine North has a proportionally larger share of the following:

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

Experience Gaps

Current gaps in experience include:

- 4-5 star/boutique accommodation
- Transport links to Central Geelong/other sub regions
- Health and wellness offer



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

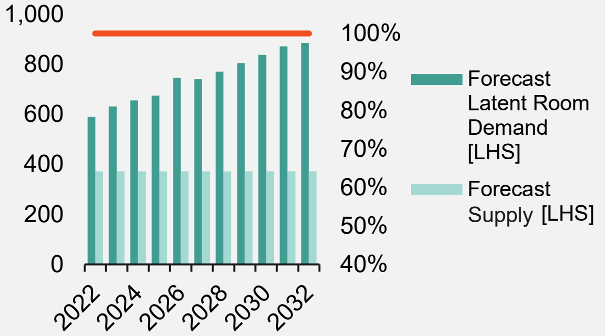
As with all sub-regions within the Bellarine, transport, seasonality and accommodation are all key challenges for visitation. These sentiments were also highlighted by key business stakeholders in the sub region through various forms of engagement. Limited space alongside a high concentration of demand 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*



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

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	54
Retail Trade	11
Arts & Recreation Services	10

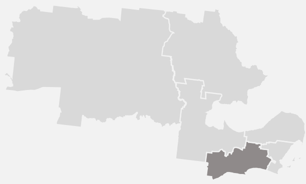
With unique services and offers in the region, Queenscliff and Point Lonsdale have a proportionally larger workforce relating to:

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

Experience Gaps

Current gaps in experience include:

- 3-4 star accommodation



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

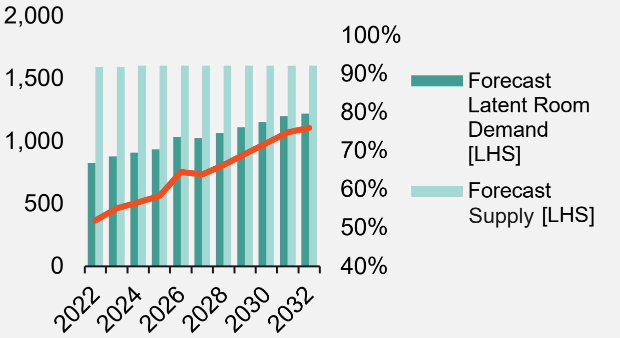
A major challenge for visitation in Bellarine South is seasonality. The HMD indicates that visitation is highest during the summer, while tapering during the colder months. Transport is also an issue in this sub region, with limited public transport offerings making it difficult to travel around without 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*



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

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	**9%**
Accommodation & Food Services	182
Retail Trade	67
Arts & Recreation Services	22

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

Current gaps in experience include:

- 3-4 star accommodation
- Health and wellness offer

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

Quality and type of accommodation limiting market draw

Limited facilities to capture business market

Cultural precinct needs to be finished

Insufficient commercial nature-based options that appeal to current markets

Daytrippers 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 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.

Jun 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.

Oct 2022

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 | $15M
In alignment with the aspirations of the Wadawurrung, 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.

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 2026.

2023

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.

Late 2023

Geelong Arts Centre – Redevelopment | $140M
Funded by the Victorian Government, the upgraded centre will feature 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. Completion is expected in late 2023.

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 Fast Rail | $4B
With the aim of delivering travel times of around 50 minutes between Geelong and Melbourne's CBD, stage one of the Fast Rail project is currently in **early planning**. **Early planning could commence ~2023*

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.

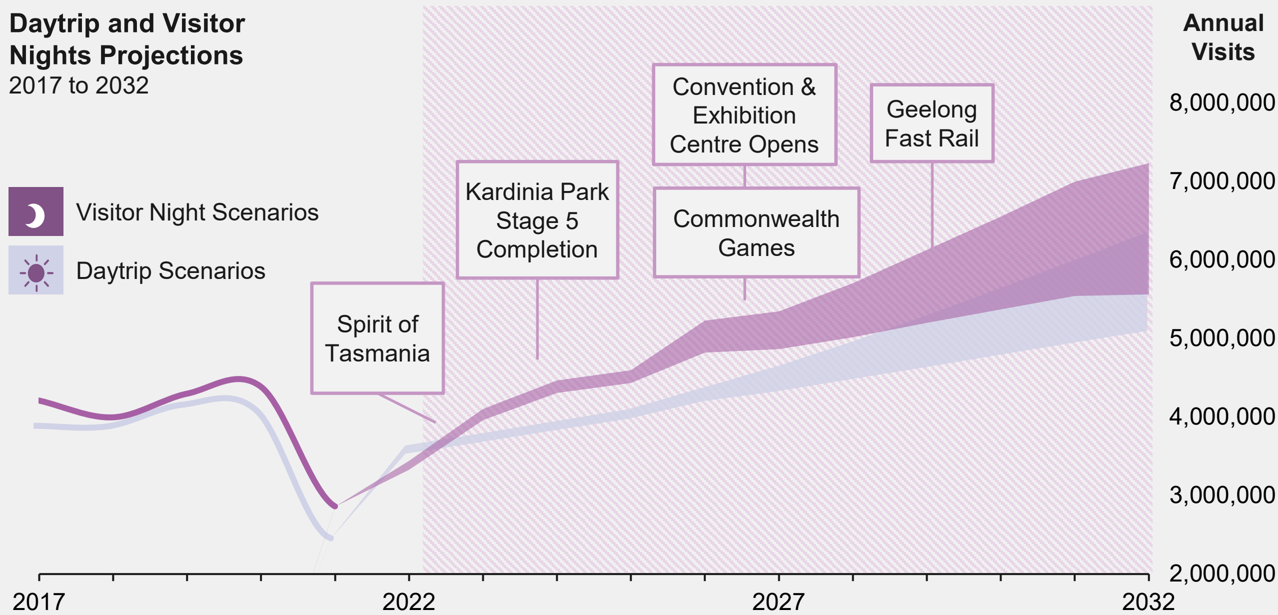
With significant investment in projects such as the Spirit of Tasmania relocation, the Geelong Convention and Exhibition Centre and a bolstered cultural precinct, the region will see higher levels of visitation across the next ten years and beyond.

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

- **Under a baseline scenario**, visitation of both day-trippers and overnight stays are expected to double.
- **The high growth scenario** assumes the region can harness the catalytic impacts of the significant investment by increasing its functionality and attractiveness, to increase by over 250%.

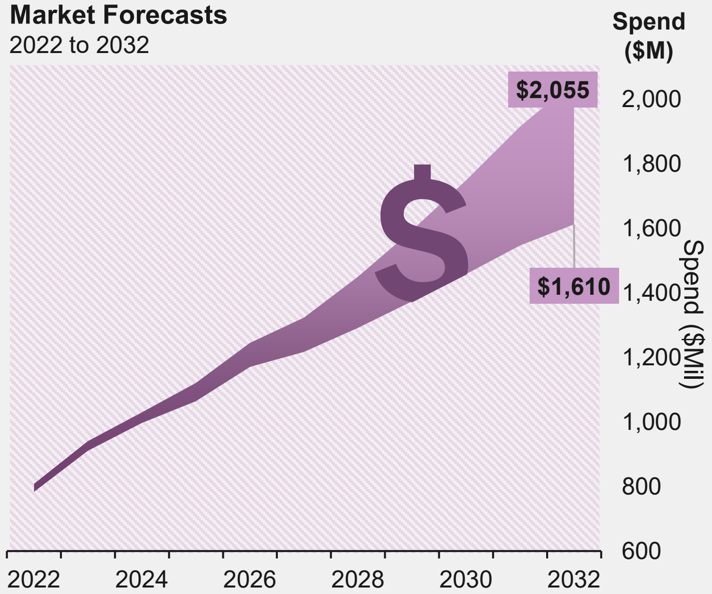
Tourism will re-emerge as a dominant contributor to the economy over the next 10 years, spurred on by known investment and further enhancement of the regions offers.

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
2022 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 close to an additional $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 between 2019 and 2021. 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.

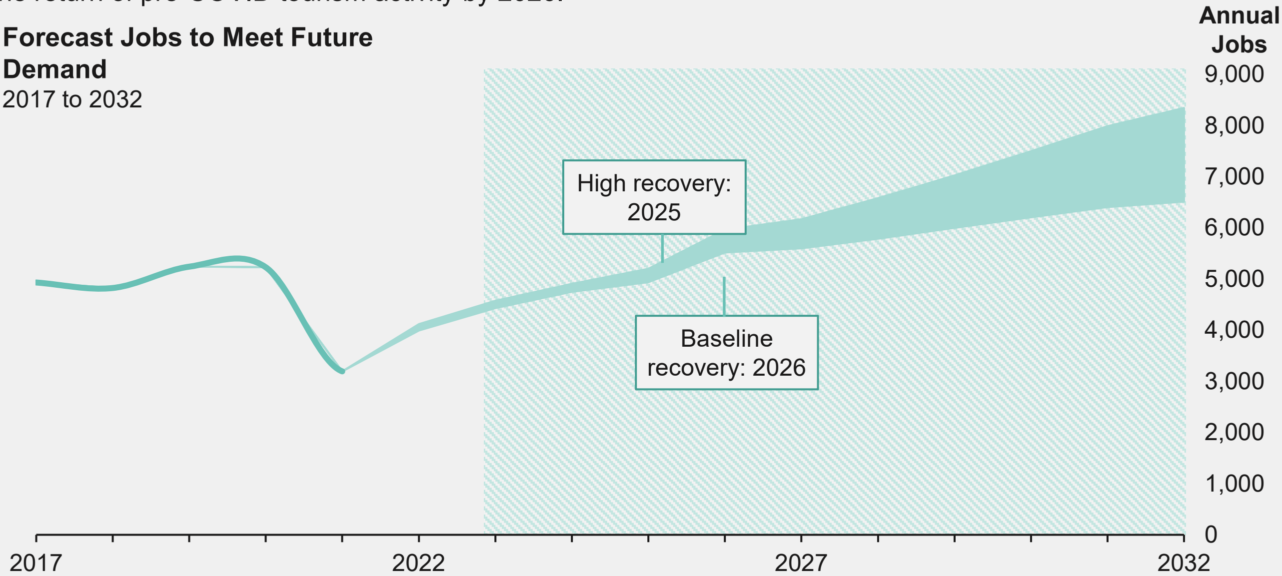
COVID-19 has seen a shift in the spending profile for the region, shifting away from education toward accommodation, food, retail and arts and culture. It is expected that this spending will normalise with the return of pre-COVID tourism activity by 2026.

Future demand for jobs has therefore been forecast to grow:

- From 3,200 in 2021 to between 6,600 under a baseline scenario.
- To 8,450 under a high growth scenario in 2032.
- This represents a growth of between 26% and 61%, 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 3,250 in 2022 to 5,700 in 2032, an average growth rate of 6% 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 and 2021 REMPLAN benchmarks

Accommodation & Food Services	2,100
Retail Trade	1,600
Services	850
Arts & Recreation Services	300
Transport, Postal & Warehousing	625
Manufacturing	150
Wholesale Trade	50
Agriculture, Forestry & Fishing	25
Σ Total	5,700

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

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 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 6,600 and 8,450 depending on a baseline or high-growth scenario.
- Without intervention, the total workforce gained locally is estimated to be 5,675.
- 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 (page 30).

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 (6.3% in 2022) 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

	Baseline – Locally Supplied	Baseline – Shortage	High tourism – Locally Supplied	High tourism – Shortage
Accommodation & Food Services	2,650 (LS)	-550	3,325 (LS)	-1,225
Retail Trade	1,925	-325	2,425	-825
Services	650	Nil	800	-125
Arts & Recreation Services	575	-275	725	-425
Transport, Postal & Warehousing	525	Nil	675	-50
Manufacturing	100	Nil	150	Nil
Wholesale Trade	50	Nil	75	-25
Agriculture, Forestry & Fishing	10	Nil	15	Nil

Legend: Baseline, High tourism

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 50% relate to accommodation and hospitality workers. This is a result of their demand across industries, as well as 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
Sales Assistants and Salespersons	●	●	●	●		
Hospitality Workers	●	●	●	●	●	●
Food Preparation Assistants	●	●	●			
Food Trades Workers	●		●		●	●
Retail Managers	●	●	●			
Accommodation and Hospitality Managers	●	●	●	●	●	●
Checkout Operators and Office Cashiers	●	●	●		●	
Automobile, Bus and Rail Drivers	●			●	●	
Sports and Fitness Workers	●	●			●	●
Freight Handlers and Shelf Fillers	●			●	●	●
Cleaners and Laundry Workers	●	●	●	●	●	●
Labourers	●			●	●	●
Sales Support Workers	●	●	●		●	
Hospitality, Retail and Service Managers	●	●	●	●	●	●
Arts 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.

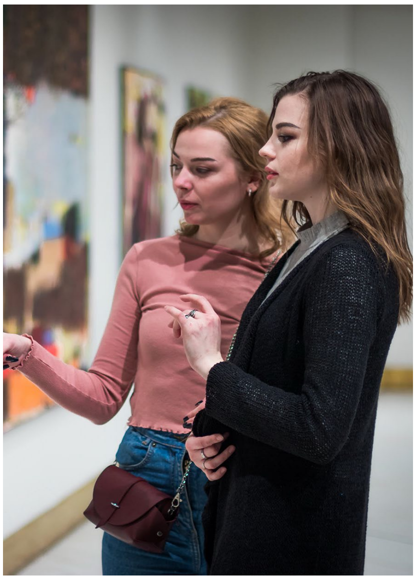
Six personas adjacent have been identified as an opportunity to engage experience driven and high value visitors leveraging existing assets, future investment and the development of new product experiences.

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

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 assets like the art, stories and practises of the Wadawurrung should be front and centre.

High Value	Advocacy	Flow On Spend
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 Value	Advocacy	Flow On Spend
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. 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 good synergies.

High Value	Advocacy	Flow On Spend
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 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 Value	Advocacy	Flow On Spend
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.

High Value	Advocacy	Flow On Spend
Medium	Low	Low

Sustainable Values

0 -3 Years

A universally emerging trend is people making choices about where they visit considering how the location and experience aligns to their sustainably minded values. The values influence all aspects of their visit from how they travel to accommodation, where they eat and what activities they take part in.

High Value	Advocacy	Flow On Spend
Low -- Medium	Low -- Medium	Low -- Medium

STRATEGIC DIRECTIONS TO 2032


PAT and

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 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 Strengthen Outdoor & Nature Based Activation
Leverage and improve the open and natural environments of Greater Geelong and the Bellarine 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, 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 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, 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 nighttime 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 bleisure 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 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.			●
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 & Bellarine, Geelong City Council, key stakeholders	Short/Medium Term
Tourism Greater Geelong & Bellarine, Geelong City Council, key stakeholders	Short/Medium Term
Tourism Greater Geelong & Bellarine, Geelong City Council, local businesses	Short Term
Tourism Greater Geelong & Bellarine, Geelong City Council, Kardinia Park Precinct	Short Term
Tourism Greater Geelong & Bellarine, Visit Victoria, Tourism Australia	Short Term
Tourism Greater Geelong & Bellarine, Geelong City Council, local businesses	Short Term
Tourism Greater Geelong & Bellarine, volunteer groups, local businesses	Short Term
Tourism Greater Geelong & Bellarine, Geelong City Council	Short Term
Tourism Greater Geelong & Bellarine, Geelong City Council, developers	Medium/Long Term
Tourism Greater Geelong & Bellarine, Geelong City Council	Short Term
Tourism Greater Geelong & Bellarine, Geelong City Council, affordable accommodation providers	Short Term/Long Term
Tourism Greater Geelong & Bellarine, local event organisers, schools, local business	Short Term
Tourism Greater Geelong & Bellarine, sub regional councils, sporting event organisers, arts/culture stakeholders	Short/Medium Term
Tourism Greater Geelong & Bellarine, Geelong City Council, Kardinia Park Trust	Short/Medium/Long Term
Tourism Greater Geelong & Bellarine, Geelong City Council	Medium/Long Term
Tourism Greater Geelong & Bellarine, key stakeholders, developers	Medium/Long Term
Tourism Greater Geelong & Bellarine, hydrogeologist, sub regional councils	Short/Medium Term
Tourism Greater Geelong & Bellarine, sub regional councils, key developers	Short/Medium Term
Tourism Greater Geelong & Bellarine, sub regional councils	Short/Medium Term
Tourism Greater Geelong & 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	Utilise swing mooring options to attract cruise ships docked in Melbourne for shore-based excursion activity.			●
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 to grow engagement.			●
4.2	Align with strategic documents such as the You Yangs Masterplan 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, educational institutions, review existing programs.		●	●
5.4	Re-position the region to feature sustainability as a core element of all work.	●	●	

Timings

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

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

STRATEGIC DIRECTIONS
DRIVING WORKFORCE GROWTH

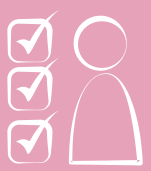
With the tourism workforce unable to support the expected growth in visitation over the next 10 years under a ‘business as usual’ scenario, there is an impetus for action to develop the workforce in a meaningful and directed manner. To achieve a sustainable workforce development strategy, consideration 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.

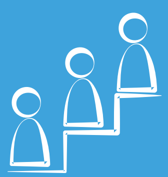
Role in Delivery: TGGB to partner and advocate for local housing solutions, support community buy-in and ensure opportunities for naturalisation into the Geelong and Bellarine community.



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 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, 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	Challenges addressed
GCC, Universities, TAFE, TGGB, Federal government	Short Term	
Community groups, TGGB, 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	
TGGB, Geelong Chamber of Commerce, Visit Victoria, international tourism agencies, Federal Government, Tourism Australia, international partner universities, multinational firms within Geelong	Short Term	
TGGB, 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, TGGB	Long term	
TGGB, sub regional Councils, Visit Victoria, National Skills Commission, employment agencies, TRA, Universities, TAFE, youth employment providers	Short Term	
TGGB, Universities, TAFE, Department of Education and Training, Geelong Chamber of Commerce	Medium Term	
TGGB, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	Long term	
TGGB, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups	Short Term	
Wadawurrung, TGGB, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	Medium Term	
TGGB, Wadawurrung, TGGB, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups, sub regional Councils, sub regional employers	Long term	