



TOURISM DEVELOPMENT PLAN SUMMARY

February 2019

TOURISM GREATER
GEELONG & THE BELLARINE



THE PLAN

This is the latest in a series of Development Plans identifying infrastructure projects with the capacity to grow the visitor economy in Greater Geelong and The Bellarine over the next 10 years.

Our Tourism Development Plan includes analysis of the current state of tourism, highlights the opportunities that would allow it to grow and provides a useful framework to guide and support the visitor economy to realise its significant potential.

THE REGION TODAY

Greater Geelong and The Bellarine attracts..



5.8m
visitors annually

3.5m
are day trippers

2.3m
are overnight
visitors

7,551
jobs annually

5%
average growth
per year since
2015

\$1.1bn
regional output

Visitation to the region has **GROWN** an average of **5%** year on year since 2015. The visitor economy is estimated to support **7,551 jobs** annually with a regional output of **\$1.1 billion**.



The Accommodation Challenge

Geelong Urban drives more than one half of total visitation to the region, however the majority of these visitors are day-trippers. The Bellarine attracts significantly more overnight visitors than Urban Geelong – over 1.5 million overnight visitors. A large proportion of overnight visitation is generated by people staying in holiday homes or staying with friends and family.

Over the past 10 years, overnight visitation to the region has had limited growth. This is in part due to conversion of holiday homes to permanent dwellings, competition from other beachside destinations and a lack of investment in accommodation.

OUR FUTURE

It is estimated that visitation will grow to 7.5 million visitors by 2027 – an extra 1.7 million visitors. As a result, direct expenditure will total \$1.7 billion, an increase of 53% since 2018.

With this growth in visitation and spend, tourism related employment is predicted to increase by 4,021 people by 2027 to 11,572.

This projected growth will require continued investment in accommodation, infrastructure and experiences to meet visitor demand. These numbers will see somewhere between 157,795 - 304,575 extra visitors expected to stay in commercial accommodation by 2027 which will

require additional guest rooms (between 1,175 and 2,409 more than the current supply) to support this projected growth over the next 10 years.

International visitors are an important, growing market for the region supported strongly by the international student population studying in Geelong.

Whilst the United Kingdom maintains top placing as the key international market, the South East Asian markets are expected to grow dramatically with the expansion of Avalon Airport and the associated international flights.



OUR STRENGTHS



The primary strengths of Greater Geelong and The Bellarine are in nature based attractions, predominantly centred on Port Phillip Bay and the ocean beaches to the south.

The water-based assets of the region act as a key motivator for visitation, whether that is in/on water experiences or simply the coastal environment. This is particularly pertinent during the peak summer season.

The events and festival calendar is another primary strength, with Geelong hosting numerous sporting and recreation events, some of global significance.

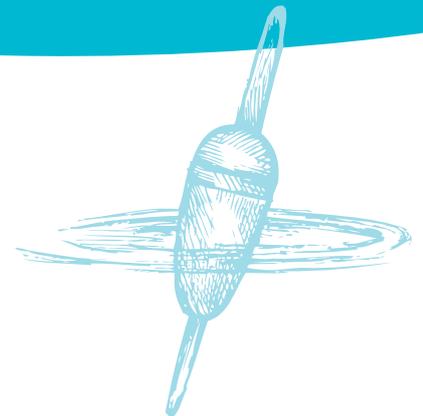
Such high profile events include the Australian International Airshow, Cadel Evans Great Ocean

Road Race and Meredith Music Festival. Major events in Greater Geelong are estimated to contribute \$64.6 million in economic benefit to the region.

The region also has primary strengths in food and beverage as well as arts and culture. Geelong is the only city in Australia designated as a City of Design by the UNESCO Creative Cities Networks.



THE OPPORTUNITIES



Each sub region within Greater Geelong and The Bellarine has unique needs and opportunities depending on existing supply and gaps.

Geelong Urban key product strengths are focused around the Waterfront precinct including the accommodation and hospitality (bars and restaurants), and nature-based activities available at the foreshore parks and Western Beach.

Key opportunities for Geelong Urban are centred on large infrastructure projects such as the convention and exhibition centre, safe harbour precinct, mineral springs spa development, cruise ship infrastructure and large scale 4-5 star accommodation.

Bellarine North captures a large number of overnight visitors, with the majority of these visitors staying in holiday homes or camping. Recent years have seen investment in hinterland product such as wineries, dining and golf.

Key opportunities for Bellarine North include large scale accommodation / resort development, further experiences around boating and seafood and further investment in Portarlington Safe Harbour.

Bellarine South includes the well-developed destinations of Ocean Grove and Barwon Heads, already well known for golf.

Key product strengths are nature-based tourism products, including the ocean beaches to the south, the Barwon River and Lake Connewarre. Investment into these natural assets, including master planning and infrastructure development, are a significant tourism growth opportunity for the region.

Reinvestment in accommodation to provide a contemporary, experiential offer to visitors is a key opportunity, including the development of nature-based accommodation.

Queenscliff and Point Lonsdale

includes one of the oldest intact historic tourism townships in Victoria, however the lack of new contemporary product and infrastructure means visitor expectations are not being met.

The Borough of Queenscliff's current tourism initiatives including the Fort Queenscliff Masterplan and the Lighthouse Reserves Masterplan are good examples of developing new, interesting product and accommodation to drive visitation.

Queenscliff is also the home of the Searoad Ferries service and there have been ongoing enhancements to the ferry infrastructure and harbour precinct. Building the visitor experience at Bellarine Railway is important.

Avalon and the You Yangs

includes the key features of Avalon Airport and the You Yangs Regional Park. Avalon Airport provides significant opportunity to grow visitation through growth in domestic and international flights and delivery of onsite large-scale accommodation.

The You Yangs already hosts quality mountain bike and nature experiences which could be further developed through complementary product such as food and beverage facilities, accommodation and future trail development linking the Regional Park to Serendip Sanctuary and Lara.

Southern Golden Plains

is largely undeveloped from a tourism infrastructure perspective, however the subregion has compelling opportunities to grow the wine sector in the Moorabool Valley and explore ways to further leverage emerging villages such as Meredith.

Continued investment in Lethbridge Airport is a key opportunity for tourism development.

Accessible Tourism

is addressed with the with the implementation of region wide accessible tourism initiatives, the opportunity to build the region as a welcoming and inclusive place for people with disabilities will grow.

GETTING THERE

Priority Projects

The following infrastructure and product development opportunities have been identified as the key to meeting visitor expectations, servicing future demand and ensuring the visitor economy in Greater Geelong and The Bellarine reaches its full potential.

These have been identified using the following selection criteria:

MATCH TO TARGET MARKET NEED

Projects that will support target markets for Greater Geelong and The Bellarine. Specifically, Lifestyle Leader segments (food and wine lifestyles, inspired by nature and creative opinion leaders) and Traditional Family Life segments.

PROMOTES LENGTH OF STAY AND YIELD

Projects that create a new product or experience or provide additional capacity for the region.

STRENGTHENS THE BRAND ATTRIBUTES

Projects that demonstrate strong links with the brand attributes of Greater Geelong and The Bellarine including food and wine, water based/nature based and for Urban Geelong, arts and culture.

ECONOMIC BENEFIT

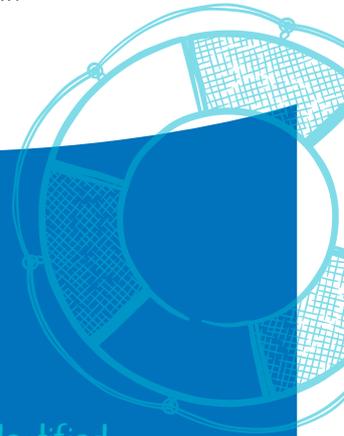
Large scale projects that are likely to deliver a large economic boost to the regional economy.

GAME CHANGER PROJECTS

Innovative new products and experiences that will capture new visitor markets.

GOOD VALUE / COST BENEFIT

Is the project likely to be good value for money? There are particular opportunities for smaller projects that will make a significant contribution to the tourism experience.



Meredith

SOUTHERN GOLDEN PLAINS

Infrastructure and enabling projects:

- > Lethbridge Airport

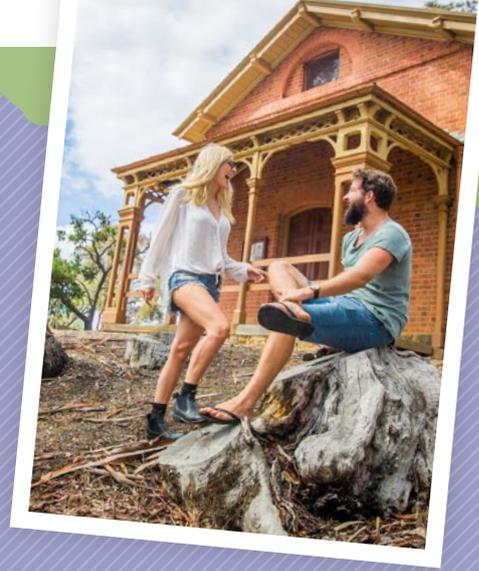
Experiential product development:

- > Living Moorabool Trail



Lethbridge

Anakie



Teesdale

GEELONG URBAN

Infrastructure and enabling projects:

- > Geelong Convention and Exhibition Centre
- > Cruise Ship infrastructure
- > Waterfront Geelong – Safe Harbour Precinct

Experiential product development:

- > GMHBA Stadium / Kardinia Park development
- > Eastern Beach spa complex development

Accommodation:

- > 4-5 star large branded hotel accommodation



Lara



Avalon

Corio

North Geelong



Geelong



Waurin Ponds

Grovedale



Mount Duneed



BELLARINE SOUTH

Infrastructure and enabling projects:

- > Barwon River Parklands project

Accommodation:

- > Barwon Coast group accommodation project
- > Nature-based resort



TOP 20 PROJECTS TO GROW & SUPPORT THE LOCAL VISITOR ECONOMY



AVALON & THE YOU YANGS

Infrastructure and enabling projects:

- > Avalon Airport Rail Link

Accommodation:

- > Avalon Airport accommodation

BELLARINE NORTH

Experiential product development:

- > Underwater dive gallery 'The Sunken Gallery'

Accommodation:

- > Large resort
- > Wellness centre with accommodation

CORIO BAY

Portarlington

Indented Heads

St Leonards

QUEENSCLIFF & POINT LONSDALE

Infrastructure and enabling projects:

- > Foreshore improvements
- > Hesse Street revitalisation
- > Ferry terminal upgrade

Experiential product development:

- > Fort Queenscliff development

Clifton Springs

Drysdale

Wallington

Ocean Grove

Barwon Heads

Pt Lonsdale

Queenscliff



Further support for regional growth

Other important projects and master plans that will support growth in the visitor economy.

GEELONG URBAN

- > Fast rail to Geelong
- > Geelong Port Phillip Ferry service (commencing December 2019)
- > Osborne Park precinct development
- > Geelong Cultural Precinct development
- > Skyrig at Adventure Park
- > Contemporary experiential accommodation

BELLARINE NORTH

- > Aquaculture experiences
- > Self-contained apartment / hotel accommodation
- > Branded tourist parks
- > Experiential accommodation
- > Bellarine Bayside Plans and Strategies

AVALON & THE YOU YANGS

- > Visitor services and amenity at You Yangs Regional Park
- > Hospitality product near You Yangs Regional Park
- > Nature based and group accommodation for You Yangs Regional Park
- > Accommodation in Anakie
- > Avalon Airport Master Plan
- > You Yangs / Serendip Master Plan

BELLARINE SOUTH

- > Barwon River Parklands project
- > Barwon Coast Trail
- > Off-peak events program
- > Nature-based resort
- > Barwon Coast Precinct Master Plans
- > Lake Connewarre Nature-Based Tourism Master Plan

QUEENSCLIFF & POINT LONSDALE

- > Investment into tracks and trails
- > Events / sculptures
- > Bellarine Railway Master Plan

SOUTHERN GOLDEN PLAINS

- > Reticulated sewerage investment
- > Telecommunications infrastructure and enabling product
- > Grow the Moorabool Valley Taste Trail
- > Bannockburn Civic Heart Project



TOURISM GREATER
GEELONG & THE BELLARINE

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The full Tourism Development Plan is available at the corporate site or via the QR code

