



Appendix 1b

12.1 Tourism Greater Geelong and the Bellarine Incorporated Memorandum of Understanding and Corporate Plan

Corporate Plan 2021 – 2025

Ordinary Meeting of Council

Wednesday 19 May 2021 at 7:00pm

Queenscliff Town Hall

TOURISM GREATER GEELONG & THE BELLARINE

2021-25 CORPORATE PLAN



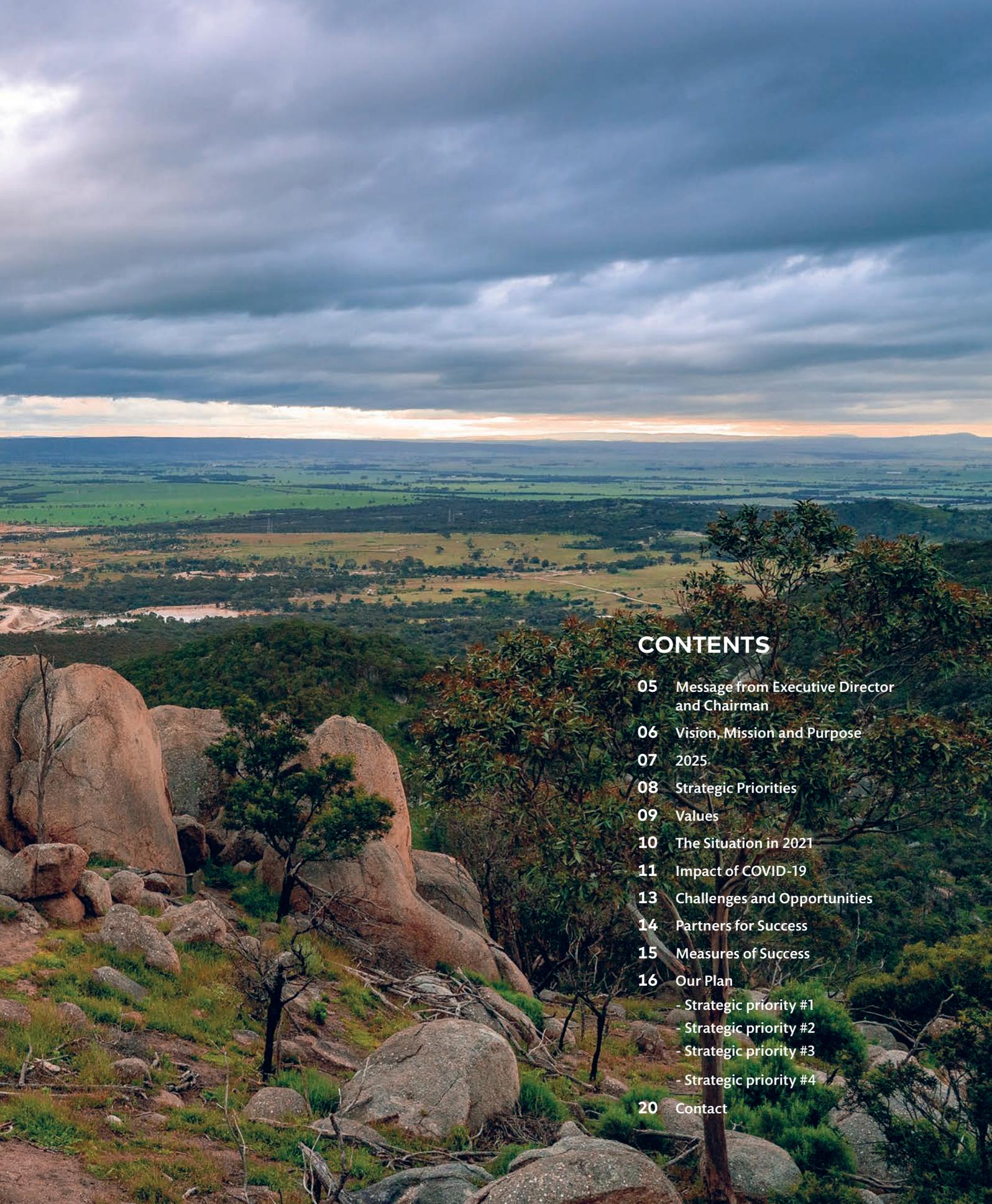
ACKNOWLEDGEMENT OF COUNTRY

We acknowledge Geelong and The Bellarine is Wadawurrung country.

We welcome visitors to our region, a place we acknowledge has been cared for by the Wadawurrung people of the Kulin Nation for thousands of years.

The environment is a key reason visitors choose this destination. Traditional Owners sharing the beauty and joy of these lands and waterways is a privilege, one we repay with respect for their country, Elders and people.





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FORGING A PATH TO A BRIGHTER FUTURE



THE WAY FORWARD IS TOGETHER

We usually begin these strategic documents by reflecting on the positive growth achieved to date, and share our vision for a brighter future.

Despite the enormous challenges the COVID-19 pandemic has thrown at our industry, we marvel at the resilience and creativity of the people who work in it, we believe that what our industry and region offers is valued, and we are confident that our region is robust enough to come back stronger than ever.

It won't happen by accident, though – this Strategic Plan provides focus and clear direction needed to drive both recovery and growth.

This Strategic Plan very deliberately outlines specific objectives that will develop meaningful partnerships and provide the support and leadership needed for the tourism industry to recover and grow stronger.

Much of the nation-wide discussion about recovery has focused on the economy. We look forward to implementing marketing and development initiatives to support growth in visitor yield and the value of our region's visitor economy. But we'll also have our eyes firmly on the recovery of our people. Tourism is an inherently human industry, and we need to take care of the hosts, the guides, the deliverers of the experiences to truly see our sector flourishing again.

This Strategic Plan acknowledges the situation we're emerging from and focuses effort and energy on the areas Tourism Greater Geelong and The Bellarine can have the most meaningful impact. Where there are challenges, there are opportunities and this Strategic Plan is a commitment to addressing the big challenges and grabbing the great opportunities.

We've outlined how we'll work collaboratively with the tourism industry, government and sector partners as well as our host communities to grow tourism in a way that delivers benefit for all those stakeholder groups.

The way forward is together and we're grateful for the support from our partners, investors and members. Thank you for the trust you've placed in our team to lead our regional tourism industry for the next four years and beyond to achieve our vision of Geelong and The Bellarine being a world-class, inclusive destination that inspires visitors to create memories and depart with a desire to return.



BRETT INCE
EXECUTIVE DIRECTOR



JOHN STEVENS
CHAIRMAN

OUR VISION, MISSION AND PURPOSE

Tourism Greater Geelong & The Bellarine is the regional tourism organisation spanning from Werribee to Armstrong Creek including Geelong, The Bellarine, Queenscliff and the Moorabool Valley.

For Geelong and The Bellarine to be a world-class inclusive destination that inspires visitors to create memories and depart with a desire to return.

WHO WE ARE

VISION

To build a resilient, sustainable & valued visitor economy that celebrates the character and identity of the region.

To provide exceptional service to our visitors, members, industry and community so they have the knowledge, tools and capability to rebuild and enjoy a resilient visitor economy.

PURPOSE

MISSION

2025

IN 2025 GEELONG AND THE BELLARINE IS A **WORLD-CLASS, INCLUSIVE DESTINATION THAT INSPIRES VISITORS TO CREATE MEMORIES AND DEPART WITH A DESIRE TO RETURN.**

There is harmony between destination development, visitor attraction and community values.

We service a resilient \$1.2B visitor economy that provides exceptional benefit to our visitors, industry, community and destination.

HOW WE DEFINE SUCCESS:

GREATER GEELONG AND THE BELLARINE HAS A \$1.2B VISITOR ECONOMY

A HEALTHY BALANCE OF VISITOR PROFILES IS MAINTAINED

MID-WEEK AND SEASONALITY IS A STRENGTH

VISITORS

LOVE AND APPRECIATE WHAT OUR REGION HAS TO OFFER.

MEASURE:

We will track visitor sentiment and the strength of positive word-of-mouth.

TARGET:

Tourism Sentiment Index rating: >55



COMMUNITY

VALUE THE IMPORTANCE OF TOURISM DEVELOPMENT IN PROVIDING GREATER QUALITY OF LIFE.

MEASURE:

We will track our performance against the annual Local Government Satisfaction survey to ensure we continue to outperform the rest of the State.

TARGET:

> State average for Performance and Importance

INDUSTRY

THE PEOPLE IN OUR INDUSTRY ENJOY PROSPERITY AND GROWTH OPPORTUNITIES.

MEASURE:

We will track the recovery of the local visitor economy to ensure we are on target to meet 2025 targets.

TARGET:

- Expenditure \$1.2b
- Nights >5.7m
- Visitors >6.4m



DESTINATION

HAS A FUTURE THAT GENERATIONS WILL BE ABLE TO ENJOY.

MEASURE:

We will develop and implement a 10 year Destination Masterplan for Greater Geelong and The Bellarine that ensures a sustainable path forward.

TARGET:

2022-2032 Destination Masterplan



OUR STRATEGIC PRIORITIES

1:

MARKETING

STRENGTHEN THE BRAND AND PEOPLE'S CONNECTION TO THE REGION TO INSPIRE A GREATER JOURNEY.



2:

SUSTAINABLE DESTINATION DEVELOPMENT

PLAN FOR BALANCED GROWTH THAT DELIVERS ECONOMIC, SOCIAL AND ENVIRONMENTAL BENEFIT FOR FUTURE GENERATIONS TO ENJOY.



3:

COLLABORATION

WORKING TOGETHER WITH GOOD GOVERNANCE TO DELIVER EXCEPTIONAL VALUE AND BENEFIT TO OUR MEMBERS, VISITORS, COMMUNITY AND DESTINATION.

4:

INDUSTRY CAPABILITY

STRENGTHEN THE CAPABILITY OF OUR REGION TO FLOURISH THROUGH A 'NEW NORMAL' AND SUPPORT OUR PEOPLE THROUGH RECOVERY.





WE LIVE AND BREATHE

TEAMWORK

EVERYONE CONTRIBUTES INDIVIDUAL STRENGTHS AND EFFORT TO ACHIEVE SHARED GOALS

CREATIVITY

A DYNAMIC ENVIRONMENT THAT EMBRACES INNOVATION AND ENCOURAGES BRAVERY

LEADERSHIP

HAVING THE PASSION, KNOWLEDGE AND CONVICTION TO SET A CLEAR PATH FORWARD WITH POSITIVITY AND ENERGY

ZEST

APPROACHING OUR WORK AND OUR FUTURE WITH INFECTIOUS OPTIMISM, EAGER ENERGY AND UNBRIDLED ENJOYMENT

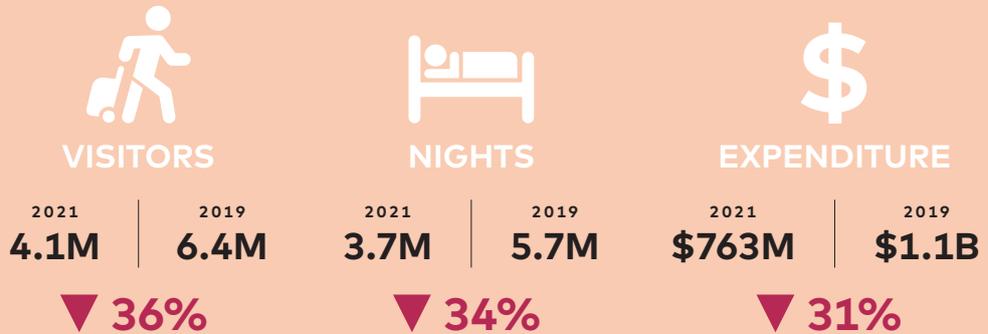
JUDGEMENT

CHALLENGING OURSELVES TO CONSIDER ALL RESOURCES SO WE'RE RESPONSIBLE FOR GOOD DECISIONS

OUR VALUES

2021

THE SITUATION IN 2021

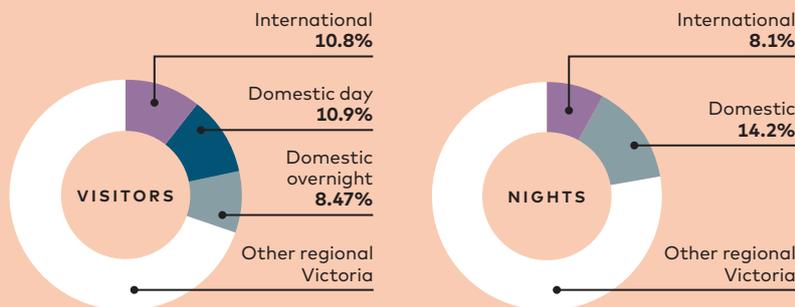


DOMESTIC OVERNIGHT VISITORS			INTERNATIONAL OVERNIGHT VISITORS			DOMESTIC DAYTRIP VISITORS		
2021	2019	CHANGE	2021	2019	CHANGE	2021	2019	CHANGE
1.1M visitors	1.8M visitors	▼ 40%	31K visitors	67K visitors	▼ 54%	3M visitors	4.6M visitors	▼ 34%
3.3M nights	4.2M nights	▼ 21%	402K nights	67K nights	▼ 73%	-	-	-
\$444M expenditure	\$584M expenditure	▼ 24%	\$32M expenditure	\$97M expenditure	▼ 67%	\$287M expenditure	\$426M expenditure	▼ 33%

Greater Geelong and The Bellarine has always been a favourite for the domestic short-break market.



Our share of regional Victoria visitation



Where did they stay

- Friend's or relative's property 49%
- Caravan park 12%
- Rental 9%
- Personal holiday house 8%

What did they do

- Eat out 59%
- Visit a friend or relative 52%
- Go to the beach 38%
- Go sightseeing 24%
- Go shopping 19%

Value

- The region's visitor economy directly employed 7,551 people and an additional 3,713 indirectly, supporting 2,635 businesses.
- According to the local government survey the community perceived tourism as one of the three highest performing services the City of Greater Geelong provides.

WHERE ARE VISITORS COMING FROM

Over 83% of travellers are from within Victoria, half of which are coming from as close as the western and central suburbs of Melbourne.

IMPACT OF COVID-19 AND THE NEW NORMAL

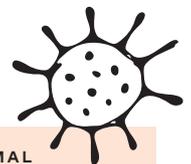
THE ONCE
\$1.1 BILLION
LOCAL
VISITOR
ECONOMY IS
EXPECTED
TO RETURN
BY 2024

COVID-19 has directly impacted the visitor economy through restrictions on travel and social distancing and an indirect impact due to a deep, but brief, Australian economic recession.

It is expected that the indirect aspects of the recession with less spending on discretionary items such as travel will continue for far longer than the travel restrictions.

During 2020 we saw visitation, nights and travel confidence significantly impacted:

- Three of the top five industry sectors impacted by COVID-19 in Greater Geelong made up 26 per cent of the area's \$1.1 billion visitor economy.
 - Accommodation and food services are by far the hardest hit in 2020, resulting in a combined loss of \$127 million for the June quarter alone.
 - Other sectors with a significant impact on the tourism industry include retail and the arts, recording losses of \$87 million and \$67 million respectively across wider Geelong for the quarter.

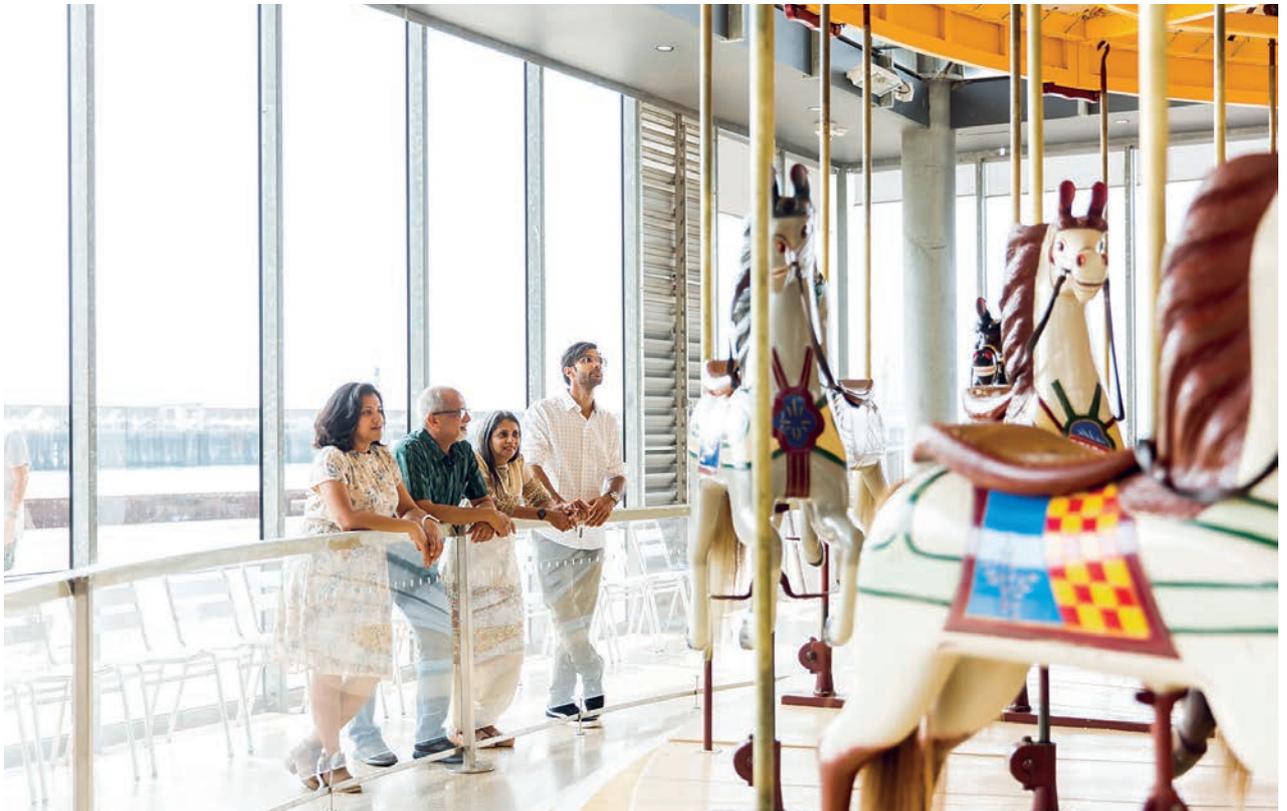


THE NEW NORMAL

- A visitor economy that is largely driven by domestic day trips and intrastate visiting friends and relatives
- Busier weekends and slower weekdays
- Slower recovery in domestic holiday travel
- Slow recovery in business travel
- Drive market to become even more significant
- Change in international markets

VISITOR SPENDING

PREDICTION YEAR	2020/21		2021/22		2022/23	
ALTERNATIVE SCENARIO FOR RECOVERY	FAST	SLOW	FAST	SLOW	FAST	SLOW
Change in Greater Geelong region visitor economy direct tourism spending (after inflation) and visitor economy average total jobs due to visitor spending compared to 2018/19.	▼ 27%	▼ 37%	▼ 13%	▼ 23%	▼ 4%	▼ 10%



CHALLENGES AND OPPORTUNITIES

OUR BIGGEST CHALLENGES

ONE

A weakened mid-week market and over-demand for weekend resulting in profitless volume.

TWO

The mental health and wellbeing of the people within the tourism industry.

THREE

Poor transport connectivity within the Greater Geelong and The Bellarine region.

FOUR

A limited workforce with both availability and capability post COVID-19 following significant local job losses and hospitality now being considered an unsafe career.

FIVE

Events pipeline slow to return due to capacity demand and revised procedures.



OUR GREATEST OPPORTUNITIES

ONE

Grow the value of the strong visiting friends and relatives' market with a focus on yield.

TWO

The proximity and connectivity of the region to key visitor markets.

THREE

Educate and work with the community to strengthen the perception on the value of local tourism.

FOUR

Engage with the region's strong domestic repeat and seasoned visitor markets.

FIVE

Addressing seasonality and reduction in mid-week visitation through regional business events, creating year-round commerce.

OUR PARTNERS FOR SUCCESS

THOSE WE WORK WITH

- Local tourism industry
- Municipal Partners
- Geelong Major Events
- Residents
- Wadawurrung Traditional Owners Aboriginal Corporation
- Investors
- Visit Victoria
- Tourism Australia
- Regional Development Victoria
- Neighbouring Regional Tourism Boards
- Victoria Tourism Industry Council
- Business events, Incentives and Travel Trade
- Media
- Local education institutions

THOSE WE STRIVE TO INFLUENCE

- Leisure travellers
- Business events and incentives
- Visiting Friends and Relatives and their local hosts
- International students, locally and in Melbourne



OUR MEASURES OF SUCCESS

REGION'S HEALTH

ONE

Tourism is valued as a significant contributor to a strong, vibrant and diverse economy within Greater Geelong and The Bellarine.

TWO

Growth and breadth of exceptional product and experiences to support visitor demand and market trends.

THREE

A reputation as a distinctive and desirable destination.

FOUR

Growth in the market share of Victoria's visitor economy.

FIVE

A healthy pipeline of business, leisure and sporting events.

TOURISM GREATER GEELONG & THE BELLARINE'S HEALTH

ONE

Strong member sentiment and perception of value towards Tourism Greater Geelong & The Bellarine.

TWO

A strong membership profile that is a true representation of the Greater Geelong and The Bellarine tourism industry.

THREE

Providing visitor information services to more visitors, when and where they need it.

FOUR

Providing meaningful and valued member engagement.

FIVE

Greater engagement and enhanced value perception with the broader community.

OUR PLAN – STRATEGIC PRIORITY #1



MARKETING: STRENGTHEN THE BRAND AND PEOPLE'S CONNECTION TO THE REGION TO INSPIRE A GREATER JOURNEY.

We will

Develop our reputation as a distinctive and desirable destination that inspires the world to visit.

Capitalise on the region's strong visiting friends and relatives' market to drive greater yield.

Grow the mid-week and shoulder seasons to reduce the impacts of seasonality.

Engage with the region's strong domestic and seasoned visitor markets to stay longer and experience more.

By

Increasing destination awareness among our key visitor markets, leveraging those with the power to influence.

Driving local awareness of the exceptional product and experiences unique to Geelong and The Bellarine.

Attracting and leveraging the region's strong and emerging business, leisure and sporting events as facilitators to regional exploration.

Provide visitors with the inspiration and information they need to explore the region, when and how they want it.

Measures of success

- A diversified visitor profile
- Recovery of mid-week travel
- Growth in market share
- Capture of visitor escape spend
- Destination promoters
- Repeat visitation
- Local pride



OUR PLAN – STRATEGIC PRIORITY #2

SUSTAINABLE DESTINATION DEVELOPMENT: PLAN FOR BALANCED GROWTH THAT DELIVERS ECONOMIC, SOCIAL AND ENVIRONMENTAL BENEFIT FOR FUTURE GENERATIONS TO ENJOY.



We will

Ensure the region's visitor economy supports the collective interests of those who call Geelong and The Bellarine home.

Strengthen the connection to the history and culture of the region's traditional owners with visitors and industry alike.

Plan for growth that provides opportunities for businesses to succeed and grow, which benefits locals through stable, year-round employment.

Ensure tourism continues to be a significant contributor to the local economy that celebrates the unique social and environmental fabric of the region.

By

Engaging with our *Partners to Success* through strategic and long-term planning.

Working with Wadawurrung Traditional Owners Aboriginal Corporation in the development of localised, authentic Aboriginal tourism product and experiences.

Support ongoing workforce development and capability strengthening that meets the current and future business needs and visitor demand.

Providing leadership, guidance and advocacy through long-term planning and destination management, always acting in the best interests of Geelong and The Bellarine.

Measures of success

- A strengthened workforce that is meeting business needs and visitor demands
- A diverse and suitable accommodation pool that supports the region's growing and changing visitor profile
- Progression of the investment pipeline with completion of major projects and developments as scheduled
- Tourism is valued as a significant contributor to a strong, vibrant and diverse economy within Greater Geelong and The Bellarine

OUR PLAN – STRATEGIC PRIORITY #3

COLLABORATION: WORKING TOGETHER, DELIVER EXCEPTIONAL VALUE AND BENEFIT TO OUR MEMBERS, VISITORS, COMMUNITY AND DESTINATION.



We will

Operate as the peak tourism organisation for Geelong and The Bellarine, to serve, protect and represent in the best interests of the local tourism industry and community.

Maximise opportunities through strategic partnerships that provide value for industry and support the growth of the local visitor economy.

By

Building a strong membership profile and supporting governance structure that is a true representation of the Greater Geelong and The Bellarine tourism industry.

Leveraging resources through strong and meaningful partnerships.

Measures of success

- Visitor engagement
- Recovery of the international student population physically studying in and experiencing the region
- Membership profile
- Providing meaningful and valued member engagement
- Greater engagement and enhanced value perception with the broader community (value vs importance)



OUR PLAN – STRATEGIC PRIORITY #4

INDUSTRY CAPABILITY: STRENGTHEN THE CAPABILITY OF OUR REGION TO FLOURISH THROUGH A 'NEW NORMAL'.



We will

Support the growth and breadth of exceptional product and experiences to support visitor demand and market trends.

Ensure businesses have the knowledge and resources they need to meet the challenges of tomorrow.

By

Providing insights, guidance and advocacy on market gaps, opportunities and demands to industry and stakeholders.

Facilitating the ongoing improvement of business capability through training and development opportunities.

Measures of success

- Visitor sentiment
- Visitor yield
- Member engagement through training and development programs





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