

# MINUTES

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## COMMUNITY FOCUS COUNCIL MEETING

TUESDAY 14 MAY 2019

7.00PM

THE SOUTH BARWON FOOTBALL AND NETBALL CLUB  
77-79 REYNOLDS ROAD  
BELMONT

**COUNCIL:**

Cr B Harwood (Kardinia Ward)  
Mayor

Cr S Asher (Bellarine Ward)  
Cr J Mason (Bellarine Ward)  
Cr T Sullivan (Bellarine Ward)  
Cr E Kontelj (Brownbill Ward)  
Cr S Mansfield (Brownbill Ward)  
Cr P Murrihy (Brownbill Ward)  
Cr R Nelson (Kardinia Ward)  
Cr P Murnane (Kardinia Ward)  
Cr A Aitken (Windermere Ward)  
Cr K Grzybek (Windermere Ward)

## **SECTION A - PROCEDURAL MATTERS**

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**MINUTES OF THE COMMUNITY FOCUS COUNCIL MEETING  
OF THE GREATER GEELONG CITY COUNCIL  
HELD AT THE SOUTH BARWON FOOTBALL AND NETBALL CLUB,  
77-79 REYNOLDS ROAD, BELMONT  
TUESDAY, 14 MAY 2019  
COMMENCING AT 7.00PM**

**PRESENT:** Cr B Harwood (Mayor), Crs A Aitken, E Kontelj, S Mansfield, J Mason, P Murnane, P Murrhiy, R Nelson, T Sullivan

**Also present:** M Cutter (Chief Executive Officer), B Luxford (Acting Director Planning, Design and Development), T Ellis (Acting Director Economy, Investment & Attraction), G Wilson-Browne (Director City Services), R Stevens (Director Community Life), M Dugina (Director Customer & Corporate Services), R Leonard (Acting Director Governance, Strategy and Performance)

**OPENING:** The Chair declared the meeting open at 7.00pm.

**ACKNOWLEDGEMENTS:**

Council acknowledged Wadawurrung Traditional Owners of this land and all Aboriginal and Torres Strait Islander People who are part of the Greater Geelong community today.

**APOLOGIES:** Crs S Asher and K Grzybek

**LEAVE OF ABSENCE:** Nil

**PRESENTATION:**

*Crs Harwood, Nelson and Murnane provided the gallery with a snapshot of some of the activities and projects happening in the Kardinia Ward.*

**CONFIRMATION OF MINUTES:**

**Cr Sullivan moved, Cr Murrhiy seconded -**

**That the Minutes of the Community Focus Council Meeting held on 8 April 2019 be confirmed.**

**Carried.**

**DECLARATIONS OF CONFLICTS OF INTEREST:** Nil.

## **QUESTION TIME:**

**Jennifer Bantow** addressed the following question in relation to Amendment C376:

Regarding the remains of the overhead conveyor structure in the former Fyansford quarry which can be viewed looking north from the Ring Road, after you bypass Fyansford.

The 100 year old Fyansford quarry overhead limestone belt conveyor structure solved a technical problem of transporting quarry material up the hill to the manufacturing plant in Fyansford, and is an example of our industrial heritage and associated the one of Geelong's earliest pioneering families the McCann family.

Can Council please confirm that what remains of this overhead conveyor structure will not be taken down and removed, to be placed at ground level in the public park area beside the Moorabool River, as was suggested by ICD Property P/L Gen Fyansford and that these remains are still protected under a reduced Heritage Overlay 1740?

*Peter Smith responded that this is a complicated matter. There will be a large public land area between the Moorabool River and the Ring Road and the heritage overlay will protect the conveyor structure in this area. There will be no heritage overlay on the land on the other side of the river and the conveyor structure will not be protected in that area which is in private ownership. This means that approximately half of the structure will be protected.*

**Kate Scorpo** asked:

I am calling on the members of the Council to genuinely consider the benefits of a dedicated Children's Museum being created in Central Geelong. Tonight, I will ask you to think about where a space like this could fit into Central Geelong, and to genuinely consider if it could fit within the new Civic Precinct.

There are four key reasons why Geelong would benefit from a Children's Museum being built in Central Geelong's Civic Precinct.

- It would provide a dedicated educational, interactive space for the children of Geelong.
- It aligns closely with a number of the Council's own strategic plans
- It would be a tourism drawcard and attract residents and tourists into central Geelong
- It would create a sense of inclusiveness and civic pride for the residents, particularly children.

I understand that designs are underway for the Civic Precinct. The proposals that are being put forward probably include retail space, private office space and café. It is very unlikely that people will cross town to specifically visit a café, when Geelong has a thriving café culture. This will not be a drawcard for locals or tourists, and will really only serve those that work in the immediate area, or those that are passing by.

On the City of Greater Geelong website you say of the site "We aim to further showcase our credentials as a UNESCO City of Design by building an iconic, inclusive and welcoming civic precinct the Geelong community can be proud of."

What better way than being truly inclusive, and welcoming to the whole Geelong community, than creating a space that actively draws people and children into the building. A café isn't going to do that, but a dedicated Children's Museum will. A Children's Museum would truly open up the building to the public. Parents, grandparents and carers would take their children to a dedicated Children's Museum, and do it often. It would demonstrate that the Council building is genuinely a building for all citizens of Geelong.

It could be space that is designed with accessibility of all people at the forefront.

If this space was visually appealing and Instagram-able, it would be a major tourism drawcard to the region. It would be a real representation of Geelong as a clever creative city in action and further support Geelong as a holder of the UNESCO city of design.

It would attract locals and tourists and provide a reason to visit, return and spend money in retail and hospitality in Central Geelong. It would be well located for people to utilize public transport via train or bus.

A Children's Museum would create local jobs in a range of skilled and unskilled roles within the Museum.

The space I am proposing doesn't have to be enormous. I urge you to visit Pauline Gandel Children's Gallery at Melbourne Museum, or Ground Up at ScienceWorks and see how a space that caters specifically for children, within the new civic precinct building would truly open the space for the whole community.

When considering the new design for the Civic Precinct, think about the representation of the community and how opening the space to the public, and in the spirit of learning could create inspiring, inclusive and welcoming space for Geelong residents and their kids.

I am asking what I can do to make a Children's Museum a priority for the City of Greater Geelong?

A Children's Museum is a space dedicated to hands-on, play-based learning. It develops curiosity, imagination, problem solving, confidence and physical, cognitive and emotional strength and development. It is different to a play centre, which focuses on physical movement only. A Children's Museum gives children the opportunity to play, explore and learn in a space that is engaging, exciting and allows for open-ended child led exploration. At this stage, Geelong does not have any permanent indoor child focused cultural spaces that fit these criteria. This is a missed opportunity to attract and cater for a large, and ever changing percentage of the population, both tourist and local.

*Brett Luxford responded he is able to assist and has sent this request to the Arts and Culture.*

**PETITIONS:** Nil.

## **1. AMENDMENT C394 – PROPOSED COASTAL INUNDATION OVERLAY**

**Source:** Planning, Design & Development – Strategic Implementation  
**Director:** Gareth Smith  
**Portfolio:** Sustainable Development

### **Purpose**

1. To seek Council support to prepare and exhibit Amendment C394 – Proposed Coastal Inundation Overlay.

### **Background**

2. The amendment proposes to implement the *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment December 2015*. The assessment was prepared by coastal engineers from Cardno as part of [Our Coast](#) - a multi-agency project which the City managed and provided funding towards.
3. The Our Coast program mapped areas around the Bellarine Peninsula and Corio Bay (from Breamlea to Point Wilson) that will be impacted by sea level rise. It included community consultation in 2016 and publishing of maps and other information on the Our Coast website.
4. Amendment C394 includes policy changes to the Municipal Strategic Statement and applies a new Land Subject to Inundation Overlay (LSIO2) to properties identified as being subject to future flood events and climate change induced sea level rise.

### **Key Matters**

5. Many of the properties are already subject to Greater Geelong Planning Scheme (Planning Scheme) flood overlays. However, the LSIO2 implements the State Government policy of planning for a 0.8m sea level rise.
6. Point Lonsdale is being excluded from the amendment at this time as further flood modelling is required that considers The Point waterway system which is currently under construction (see **Attachment 2** for details).
7. The LSIO2 (**Attachments 3 and 4**) will trigger a planning permit for buildings and works with exemptions including upper storey extensions, additions and outbuildings less than 20 square metres and farm buildings less than 100 square metres.
8. The amendment applies the LSIO2 to 1726 properties around the City's coast including 1241 residential zoned properties of which 62 are vacant land (see **Attachment 5** maps).

**Cr Mason moved, Cr Mansfield seconded -**

**9. That Council:**

- 9.1 Support the preparation and exhibition of Amendment C394 to the Greater Geelong Planning Scheme to:**
- (a) Amend Clause 21.05 to refer to the *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment* and make minor policy changes;**
  - (b) Introduce Schedule 2 to the Land Subject to Inundation Overlay titled "Coastal Inundation and Hazard" (LSIO2) based on Attachment 4; and**
  - (c) Apply the new LSIO2 to land identified as being inundated by the 1% AEP flood event plus 0.8 metre sea level rise (maps in Attachment 5).**
- 9.2 Request the Minister for Planning to authorise the preparation and exhibition of Amendment C394; and**
- 9.3 Support the future consideration of applying the LSIO2 to the Point Lonsdale area when further modelling is undertaken that includes The Point waterway system.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. Application of the overlay will not have any significant financial implications to Council with the exception of the usual costs associated with the planning scheme amendment process.
2. As the proponent and Planning Authority, the City will be responsible for all amendment related costs including landowner notification, panel hearing fees and engagement of expert witnesses at a panel hearing.
3. Council officers are in discussions with the State Government on obtaining funding to assist with the amendment and hence implement the Our Coast work which was primarily funded by State Government and resourced by the City.

### ***Community Engagement***

4. Community engagement occurred previously as part of "Our Coast" including community open house sessions and publishing of extensive information on the website. This includes the scientific reports, hazard assessments and inundation maps which form the basis of this amendment.
5. However, while there is information publicly available it is likely that many landowners are not aware that their properties have been identified as potentially affected by future sea level rise.
6. If Council resolves to support this amendment the public exhibition process will involve a mail out to all affected landowners and notices in local newspapers and the Victoria Government Gazette as required by the *Planning and Environment Act 1987*.
7. Interested parties will be able to make submissions which would be considered by Council and most likely referred to an independent panel where submitters could further present their case at a panel hearing.

### ***Social Equity Considerations***

8. The amendment is expected to have positive social impacts. Coastal erosion, flooding, sea level rise and storm surge can result in significant costs for the community and the State. It can severely disrupt communities and in extreme cases, cause extensive damage to public and private property, agricultural losses, personal hardship and potential loss of life. The amendment has positive economic and social benefits by identifying areas where planning permit assessment can reduce the risk of these harms.

### ***Policy/Legal/Statutory Implications***

9. The amendment is supported by the following policies from the State section of the planning scheme:
10. Clause 13.01-2S Coastal inundation and erosion – the amendment achieves the policy objective "to plan for the potential coastal impacts of climate change" and implements the following strategies:
  - 10.1 Plan for sea level rise of not less than 0.8 metres by 2100 and allow for the combined effects of tides, storm surges, coastal processes and local conditions such as topography and geology when assessing risks and coastal impacts associated with climate change;
  - 10.2 Ensure that land subject to coastal hazards is identified and appropriately managed to ensure that future development is not at risk; and
  - 10.3 Avoid development in identified coastal hazard areas susceptible to inundation.

11. Clause 13.03-1S Floodplain management – the amendment meets the objective to assist in the protection of:
  - 11.1 Life, property and community infrastructure from flood hazard;
  - 11.2 The natural flood carrying capacity of rivers, streams and floodways;
  - 11.3 The flood storage function of floodplains and waterways;
  - 11.4 Floodplain areas of environmental significance to river health; and
  - 11.5 The amendment also implements the strategies to “Identify land affected by flooding, including land inundated by the 1 in 100 year flood event or as determined by the floodplain management authority in planning schemes” and “Avoid intensifying the impact of flooding through inappropriately located use and development.”
12. The amendment supports and implements the following policies from the local section of the planning scheme:
13. Clause 21.05-4 Coastal environments:
  - 13.1 The objectives: To protect, maintain and enhance the coast, estuaries and marine environment and to respect and manage coastal processes; and
  - 13.2 The strategy: Setback future land use and development from coastal areas, estuaries and coastal wetlands to provide a buffer which is adequate to accommodate coastal recession and the landward migration of coastal wetland vegetation communities such as mangroves and salt marshes.
14. Clause 21.05-5 Climate change:
  - 14.1 The objective: To plan for and adapt to the impacts of climate change; and
  - 14.2 The strategy: Avoid land use and development within areas considered at risk of coastal erosion or inundation from flooding, storm surge or rising sea levels.
15. Clause 21.05-7 Flooding – has relevant objectives:
  - 15.1 To protect floodplains; and
  - 15.2 To minimise the potential for damage and risks to public safety and property from flooding.

***Alignment to Council Plan***

16. The proposed amendment aligns with the Council Plan strategic priorities of:
  - 16.1 Planned sustainable development – including the priority of improving the environmental performance of new developments, using planning controls; and
  - 16.2 Effective environmental management – including the Climate Change Adaptation Strategy and protection of coastal areas.

***Conflict of Interest***

17. No Council officers involved in the preparation of the report have a direct or indirect interest in the issue to which this report relates.

***Risk Assessment***

18. There is a risk that if Council, as the Planning Authority, does not act on the coastal inundation mapping it has available it may be liable if flooding occurs in the future and

damages property. Council can reduce this risk by acting on the scientific based data it has available and applying the appropriate overlay.

19. The overlay will help reduce risk of property damage as a result of sea level rise and coastal storm events by requiring a planning permit for new dwellings and other buildings and works. This will enable both Council as the Responsible Authority and the Corangamite Catchment Management Authority as the Floodplain Management Authority to apply adaptation measures such as raising building floor levels or building designs that allows periodic inundation to occur.

***Environmental Implications***

20. The amendment will help manage the environmental hazard posed by future sea level rise. The Land Subject to Inundation Overlay will trigger a planning permit requirement for relevant buildings and works. This includes new dwellings, subdivision and earthworks that alter natural ground levels. The Responsible Authority and Floodplain Management Authority will be able to assess planning applications in areas identified as potentially vulnerable from future sea level rise and associated environmental hazards such as coastal erosion, flooding and storm surge.

## Attachment 2

### **Background**

#### Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment (Our Coast Project)

1. The Our Coast project is a Victorian Government funded initiative and covers the area from Breamlea to Point Wilson. It expands on two previous climate change coastal research projects undertaken by the CSIRO and the Victorian Government (Future Coasts). The Our Coast assessment is known as a “3rd pass” assessment.
2. The Our Coast Senior Partnership Group has guided the preparation of the *Bellarine Corio Bay Coastal Hazard Assessment* and the amendment. Agencies involved are: City of Greater Geelong, Borough of Queenscliff, Department of Land Water Environment and Planning, Corangamite Catchment Management Authority, Barwon Coast Committee of Management and Bellarine Bayside Committee of Management.
3. The Our Coast website states:
  - 3.1 *“Our climate is changing as a result of global warming. These changes will exacerbate existing coastal hazards such as rising sea levels, storm surges and coastal erosion. The Our Coast project brought local Councils and their communities together to plan for these changes.... the Geelong and Bellarine Peninsula region is one of four Victorian coastal regions to undertake Local Coastal Hazard Assessments.”*
4. The Bellarine Peninsula and Corio Bay LCHA has involved three key steps:
  - 4.1 Phase 1 - The Geelong-Queenscliff Coastal Mapping Project – identified areas exposed to erosion and inundation hazards with future sea level rise. This involved a technical assessment of coastal data looking at hazards including catchment inundation, storm surge and erosion; and resulted in a series of hazard maps showing inundation in a range of severe weather events and sea level rise scenarios. The erosion component was not proceeded with following a peer review;
  - 4.2 Phase 2 – The Geelong-Queenscliff Coastal Climate Change Risk Assessment - This assessment identified the impact of inundation hazards identified in the Geelong-Queenscliff Coastal Mapping project on coastal communities and adjoining natural areas. In particular, it investigated and prioritised risks to private, public, environmental and social/cultural assets; and
  - 4.3 Phase 3 – Geelong-Queenscliff Coastal Adaptation Program - This phase is investigating adaptation solutions and responses to the coastal hazards and risks identified in the earlier stages of the Our Coast program. This project falls within the Phase 3 process.
5. The Our Coast project does include descriptions of potential adaptation measures that could protect parts of the Bellarine and Corio Bay from sea level rise with examples including:
  - 5.1 Constructing a higher seawall at Ocean Grove;
  - 5.2 Raising seaside roads at Portarlington;
  - 5.3 Raising the railway line at Point Lonsdale; and
  - 5.4 Back flow valves on stormwater outlets at Barwon Heads.
6. However, the aspect of Our Coast that is ready for planning scheme implementation is the Local Coastal Hazard Assessment (LCHA) Inundation Report prepared by Cardno and the associated flood modelling and mapping of different sea level rise and storm event scenarios. This is the aspect that Amendment C394 is seeking to implement.

7. In 2017 the Our Coast group engaged two experienced planning consultants who are also current and former VCAT and panel members - John Keaney and Michael Kirsch - to provide options on planning scheme implementation for the City of Greater Geelong and Borough of Queenscliffe.
8. The key element of the LCHA to be implemented is the mapping of coastal inundation based on a 1% Annual Exceedance Probability (AEP) + 0.8m sea level rise. This standard approximates the State policy to "Plan for possible sea level rise of 0.8 metres by 2100..."
9. Keaney and Kirsch reviewed the various 'planning scheme' options that are available to implement this mapping and to apply a set of planning scheme controls.
10. The key outcomes of the review are:
  - 10.1 A preferred planning scheme approach to managing sea level rises based on including all land within the 1% AEP + 0.8m SLR area as identified in the LCHA in a Land Subject to Inundation Overlay (LSIO); and
  - 10.2 A draft LSIO schedule (exempting minor buildings and works from permission), a draft Local Planning Policy and draft changes to the two Municipal Strategic Statements.
11. The approach taken with Amendment C394 directly follows the advice of the Keaney and Kirsh report with some fine tuning to the LSIO schedule.

### **Discussion**

#### Precedents in other parts of Victoria

12. Amendment C394 is a large amendment for the City due to the number of coastal residential properties affected. The City is showing leadership in moving to implement sea level rise mapping but there are also other parts of the State where the related LSIO has been successfully applied.
13. Five other planning scheme amendments have been exhibited and subject to panel reports and subsequently applied the LSIO to areas affected by future sea level rise of 0.8m as follows:
  - 13.1 South Gippsland Amendment C81 - applied the LSIO to areas affected by inland flooding and current and predicted coastal inundation, and introduced supporting policy. The LSIO was applied to areas within the predicted 0.8m sea level rise by 2100;
  - 13.2 Bass Coast Amendment C82 - applied the LSIO to areas affected by riverine flooding and predicted coastal inundation, and introduced supporting policy. Initiated by the Bass Coast Shire Council, West Gippsland Catchment Management Authority and Melbourne Water, and was approved following a panel hearing in 2014. The exhibited LSIO was applied to areas within the predicted 0.8m sea level rise by 2100;
  - 13.3 Moyne Amendment C54 - implemented Stage 1 of the Port Fairy Floodplain Management Plan, and introduced new flood mapping, through the use of the FO and LSIO, together with a new 'flooding' policy and Local Floodplain Development Plan. This amendment was approved in December 2014;

- 13.4 Moyne Planning Scheme Amendment C60 - implemented the Port Fairy West Structure Plan and applied the LSIO based on the Future Coasts Port Fairy LCHA 2013. This amendment was the subject of a panel hearing held in 2016. The LSIO mapping was based on available modelling and was applied to the area within the predicted 0.8m sea level rise. This amendment was approved in October 2016; and
- 13.5 Mornington Peninsula Amendment C216 – affecting Westernport Bay in particular around Hastings. It applied the LSIO based on the Western Port Local Coastal Hazard Assessment mapping at 0.8m sea level rise. It was subject to a panel report of August 2018 and was approved in March 2019.
14. In addition, a Coastal Hazard Assessment is now being undertaken by the State Government for all the coastal land around Port Philip Bay. This will eventually roll out into planning scheme amendment for the bayside municipalities.

Detail of the Amendment

15. The amendment implements State policy which requires planning authorities to plan for possible sea level rise of 0.8 metres by 2100.
16. The amendment seeks to:
- 16.1 amend Clause 21.05 Natural Environment to refer to the *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment December 2015* and include a new objective and strategy at Clause 21.05-5 Climate Change relating to coastal impacts of climate change;
- 16.2 introduce a new Schedule 2 to Clause 44.04 titled “Coastal Inundation and Hazard” (LSIO2); and
- 16.3 apply LSIO2 to land identified in the *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment December 2015* as being inundated by the combined effects of the 1% Average Event Probability (AEP) flood event plus 0.8 metre sea level rise.
17. The objectives of LSIO2 include:
- 17.1 to protect land vulnerable to coastal inundation from inappropriate development;
- 17.2 to plan for projected sea level rises to ensure that the community and assets are not exposed to an unacceptable level of risk associated with the coastal impacts of climate change; and
- 17.3 to ensure that any new development is suitably designed to ensure that it is compatible with the identified flood hazard and local drainage characteristics.
18. Minor policy changes are also required to refer to the Our Coast local coastal hazard assessment.
19. The Land Subject to Inundation Overlay clause from the Victoria Planning Provisions is in **Attachment 3**. The specific Schedule proposed under this amendment, LSIO2, is in **Attachment 4**. Maps of the areas over which the LSIO2 is to be applied are in **Attachment 5**.

Point Lonsdale area

20. The Point residential development (previously Stockland) at Point Lonsdale includes a waterway system that will drain this part of Point Lonsdale. The development was subject to a combined Environmental Effects Statement, Amendment (C150) and Planning Permit approximately 10 years ago. As part of this process modelling was undertaken to show how the new waterway system would function under sea level rise and storm surge events. The mapping at the time showed that The Point residential area and some existing residential areas in Point Lonsdale would also benefit from this waterway system as it would reduce the flood impact.
21. At the time the Our Coast mapping was undertaken The Point waterway was not in existence and hence was not picked up as a topographical feature or part of the drainage system. The mapping produced therefore doesn't take into account this waterway.
22. It is proposed that further mapping be undertaken that includes the new waterway and the LSIO2 be applied at a later date under a separate planning scheme amendment.
23. The City will also continue to liaise with the Borough of Queenscliffe as its part of Point Lonsdale township is also affected by potential sea level rise. Ideally an overlay would be applied as part of a joint amendment involving both municipalities.

### **Attachment 3 - Land Subject to Inundation Overlay (State provision)**

**44.04**  
S1/07/2018  
VC148

#### **LAND SUBJECT TO INUNDATION OVERLAY**

Shown on the planning scheme map as LSIO with a number (if shown).

##### **Purpose**

To implement the Municipal Planning Strategy and the Planning Policy Framework.

To identify land in a flood storage or flood fringe area affected by the 1 in 100 year flood or any other area determined by the floodplain management authority.

To ensure that development maintains the free passage and temporary storage of floodwaters, minimises flood damage, is compatible with the flood hazard and local drainage conditions and will not cause any significant rise in flood level or flow velocity.

To reflect any declaration under Division 4 of Part 10 of the *Water Act, 1989* where a declaration has been made.

To protect water quality in accordance with the provisions of relevant State Environment Protection Policies, particularly in accordance with Clauses 33 and 35 of the State Environment Protection Policy (Waters of Victoria).

To ensure that development maintains or improves river and wetland health, waterway protection and flood plain health.

**44.04-1**  
S1/07/2018  
VC148

#### **Land subject to inundation objectives and statement of risk**

A schedule to this overlay may contain:

- Land subject to inundation management objectives to be achieved.
- A statement of risk.

**44.04-2**  
S1/07/2018  
VC148

#### **Buildings and works**

A permit is required to construct a building or to construct or carry out works, including:

- A fence.
- Roadworks, if the water flow path is redirected or obstructed.
- Bicycle pathways and trails.
- Public toilets.
- A domestic swimming pool or spa and associated mechanical and safety equipment if associated with one dwelling on a lot.
- Rainwater tank with a capacity of not more than 10,000 litres.
- A pergola or verandah, including an open-sided pergola or verandah to a dwelling with a finished floor level not more than 800mm above ground level and a maximum building height of 3 metres above ground level.
- A deck, including a deck to a dwelling with a finished floor level not more than 800mm above ground level.
- A non-domestic disabled access ramp.
- A dependent person's unit.

This does not apply:

- If a schedule to this overlay specifically states that a permit is not required.
- To flood mitigation works carried out by the responsible authority or floodplain management authority.

- To the following works in accordance with plans prepared to the satisfaction of the responsible authority:
  - The laying of underground sewerage, water and gas mains, oil pipelines, underground telephone lines and underground power lines provided they do not alter the topography of the land.
  - The erection of telephone or power lines provided they do not involve the construction of towers or poles.
- To post and wire and post and rail fencing.

**44.04-3**  
31/07/2018  
VC148

#### **Subdivision**

A permit is required to subdivide land.

**44.04-4**  
31/07/2018  
VC148

#### **Application requirements**

An application must be accompanied by any information specified in a schedule to this overlay.

**44.04-5**  
31/07/2018  
VC148

#### **Local floodplain development plan**

If a local floodplain development plan has been developed for the area and has been incorporated into this scheme, an application must be consistent with the plan.

**44.04-6**  
31/07/2018  
VC148

#### **Exemption from notice and review**

An application under this overlay is exempt from the notice requirements of section 52(1)(a), (b) and (d), the decision requirements of section 64(1), (2) and (3) and the review rights of section 82(1) of the Act.

**44.04-7**  
31/07/2018  
VC148

#### **Referral of applications**

An application must be referred to the relevant floodplain management authority under Section 55 of the Act unless in the opinion of the responsible authority, the proposal satisfies requirements or conditions previously agreed in writing between the responsible authority and the floodplain management authority.

**44.04-8**  
31/07/2018  
VC148

#### **Decision guidelines**

Before deciding on an application, in addition to the decision guidelines in Clause 65, the responsible authority must consider, as appropriate:

- The Municipal Planning Strategy and the Planning Policy Framework .
- Any local floodplain development plan.
- Any comments from the relevant floodplain management authority.
- The existing use and development of the land.
- Whether the proposed use or development could be located on flood-free land or land with a lesser flood hazard outside this overlay.
- The susceptibility of the development to flooding and flood damage.
- The potential flood risk to life, health and safety associated with the development. Flood risk factors to consider include:
  - The frequency, duration, extent, depth and velocity of flooding of the site and accessway.
  - The flood warning time available.

- The danger to the occupants of the development, other floodplain residents and emergency personnel if the site or accessway is flooded.
- The effect of the development on redirecting or obstructing floodwater, stormwater or drainage water and the effect of the development on reducing flood storage and increasing flood levels and flow velocities.
- The effect of the development on river health values including wetlands, natural habitat, stream stability, erosion, environmental flows, water quality and sites of scientific significance.
- Any other matters specified in a schedule to this overlay.

## Attachment 4 – Draft Schedule 2 to LSIO

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C394ggee

### **SCHEDULE 2 TO CLAUSE 44.04 LAND SUBJECT TO INUNDATION OVERLAY**

Shown on the planning scheme map as **LSIO2**

#### **COASTAL INUNDATION AND HAZARD**

##### **1.0 Land subject to inundation objectives to be achieved**

--/20--  
C394ggee

To protect land vulnerable to coastal inundation from inappropriate development.

To plan for projected sea level rises to ensure that the community and assets are not exposed to an unacceptable level of risk associated with the coastal impacts of climate change.

To identify land in coastal areas that may be inundated by the combined effects of the 1% Average Event Probability (AEP) flood event plus 0.8 metre sea level rise.

To ensure that any new development is suitably designed to ensure that it is compatible with the identified flood hazard and local drainage characteristics.

##### **2.0 Statement of risk**

--/20--  
C394ggee

A number of areas in the municipality are susceptible to flooding, via the flooding of waterways, stormwater runoff and coastal inundation, which have the potential to result in significant adverse economic, social and environmental impacts. Areas of coastal inundation and hazard have been identified in the *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment - Inundation Report*, Cardno for City of Greater Geelong (2015) which is the source of mapping in this overlay.

##### **3.0 Permit requirement**

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C394ggee

A permit is not required to construct a building or carry out works for:

- An extension to an existing dwelling, provided the gross floor area of the extension does not exceed 20 square metres.
- Outbuildings and works normal to an existing dwelling including a deck or verandah that do not exceed 20 square metres, landscaping, a pergola, driveway, carport, barbeques and water tank.
- Agricultural and farm buildings less than 100 square metres in gross floor area.
- A building which is open on all sides including a domestic shed, animal enclosure, stockyard or agricultural shed.
- An upper storey extension to an existing building within the existing building footprint.
- A footpath, bicycle path, boardwalk, tennis court or sports ground provided that they are constructed at ground level.
- An in-ground domestic swimming pool or spa and associated mechanical and fencing equipment where the excavated spoil is removed and the perimeter edging of the pool is finished at natural ground level.
- An elevated boardwalk, provided that the new surface levels are above the applicable levels set by the relevant floodplain management authority.
- Repairs and routine maintenance of existing fences if the fence design and materials remain the same.
- A radio mast, telecommunications tower, antenna, power pole or light pole.
- An outdoor advertising sign/structure.
- Earthworks that do not change the rate of flow or the discharge point of water across a property boundary.

- Works carried out by any water authority to maintain and replace infrastructure related to sewer and water supply.
- Works carried out under the *Coastal Management Act 1995* or the *Crown Land (Reserves) Act 1978* that have had regard to the Bellarine Peninsula – Corio Bay Local Coastal Hazard Assessment and are conducted by a public land manager or a coastal committee under the *Coastal Management Act 1995*.

#### 4.0 Application requirements

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C394ggee

The following application requirements apply to an application for a permit under Clause 44.04, in addition to those specified in Clause 44.04 and elsewhere in the scheme and must accompany an application, as appropriate, to the satisfaction of the responsible authority:

- A location plan drawn to scale, showing the boundaries and dimensions of the site, surrounding uses, the layout of existing and proposed buildings and works and the distance to coast or estuary.
- Elevation plans taken by or under the direction and supervision of a licensed land surveyor showing natural ground level, finished ground level and the floor levels of any existing and proposed buildings in relation to both AHD and the level as nominated by the relevant floodplain management authority at 2100.
- A detailed site plan with 0.5 metre contours showing the layout of existing and proposed buildings and works, watercourses, access roads, vegetation and all infrastructure that may be affected by flooding, sea level rise or coastal inundation, taken by or under the direction and supervision of a licensed land surveyor.
- An outline of actions or measures required, if any, to the siting and design of the buildings or works, or in association with the use and occupation of all aspects of the proposal in order to reduce the risk to individuals, property, infrastructure and the environment over the predicted life of the buildings or works. These actions may include the consideration of adaptation options such as planned retreat, setbacks, accommodation of changes through floor heights, site and land forming and drainage works.

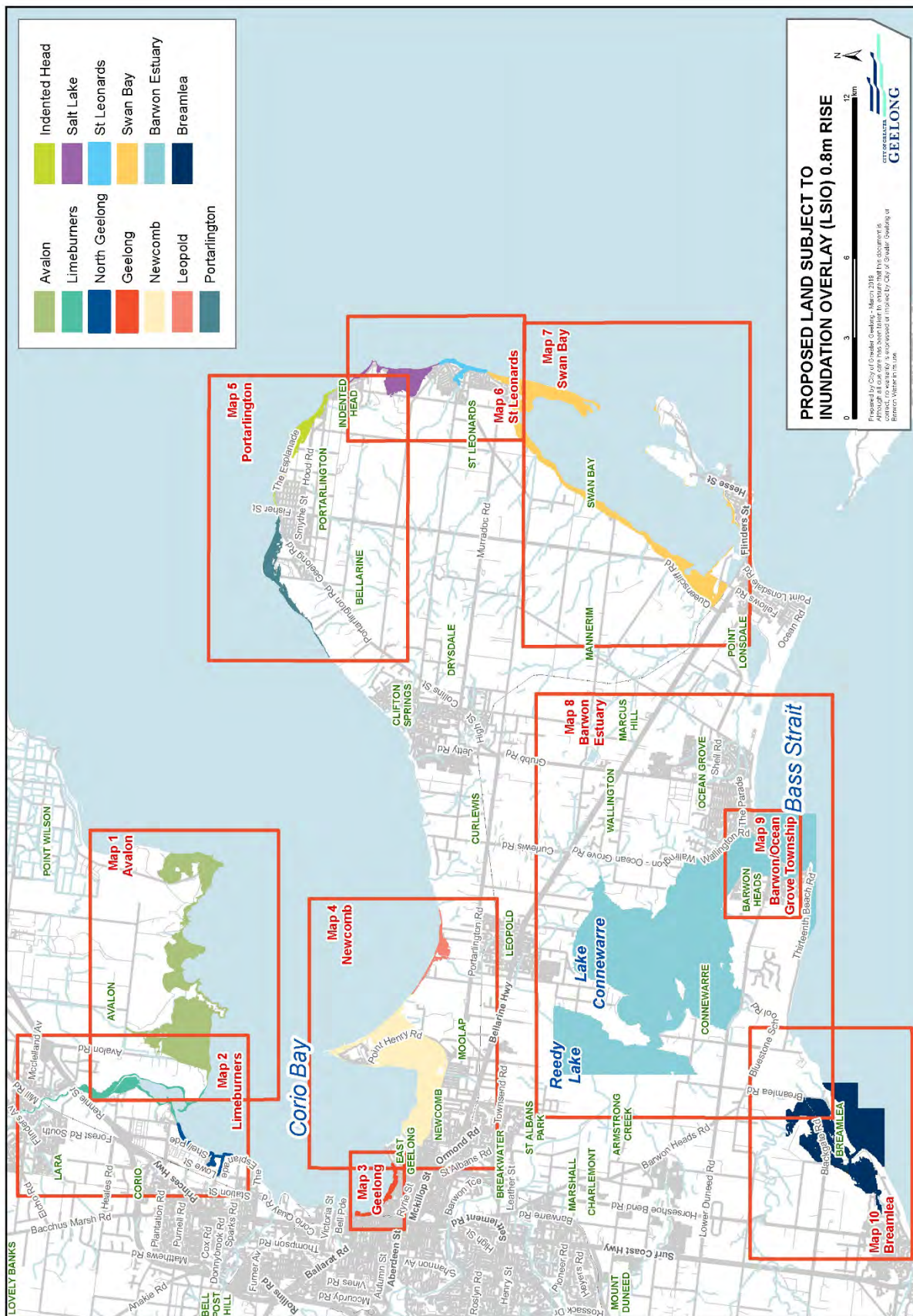
#### 5.0 Decision guidelines

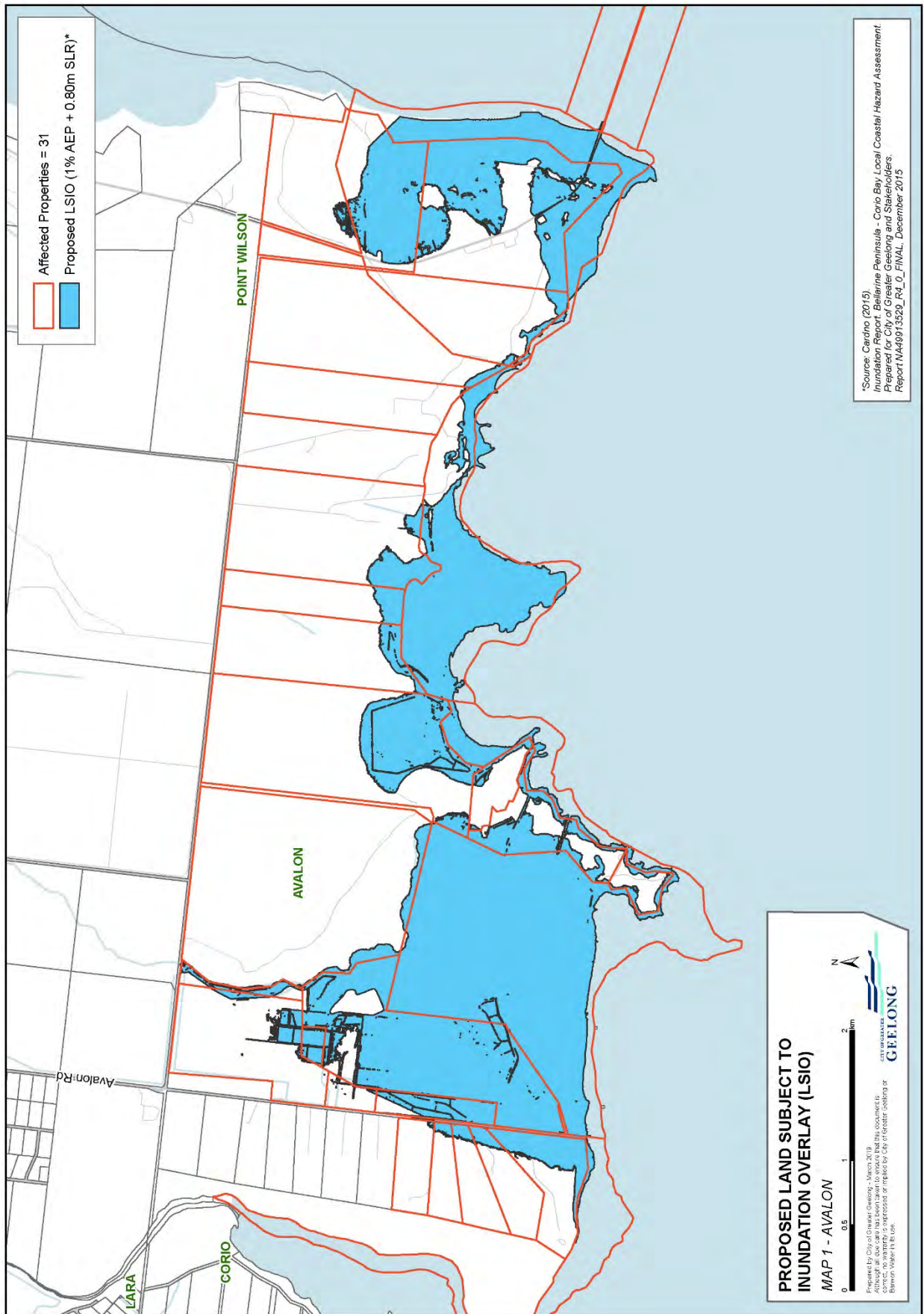
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C394ggee

The following decision guidelines apply to an application for a permit under Clause 44.04, in addition to those specified in Clause 44.04 and elsewhere in the scheme which must be considered, as appropriate, by the responsible authority:

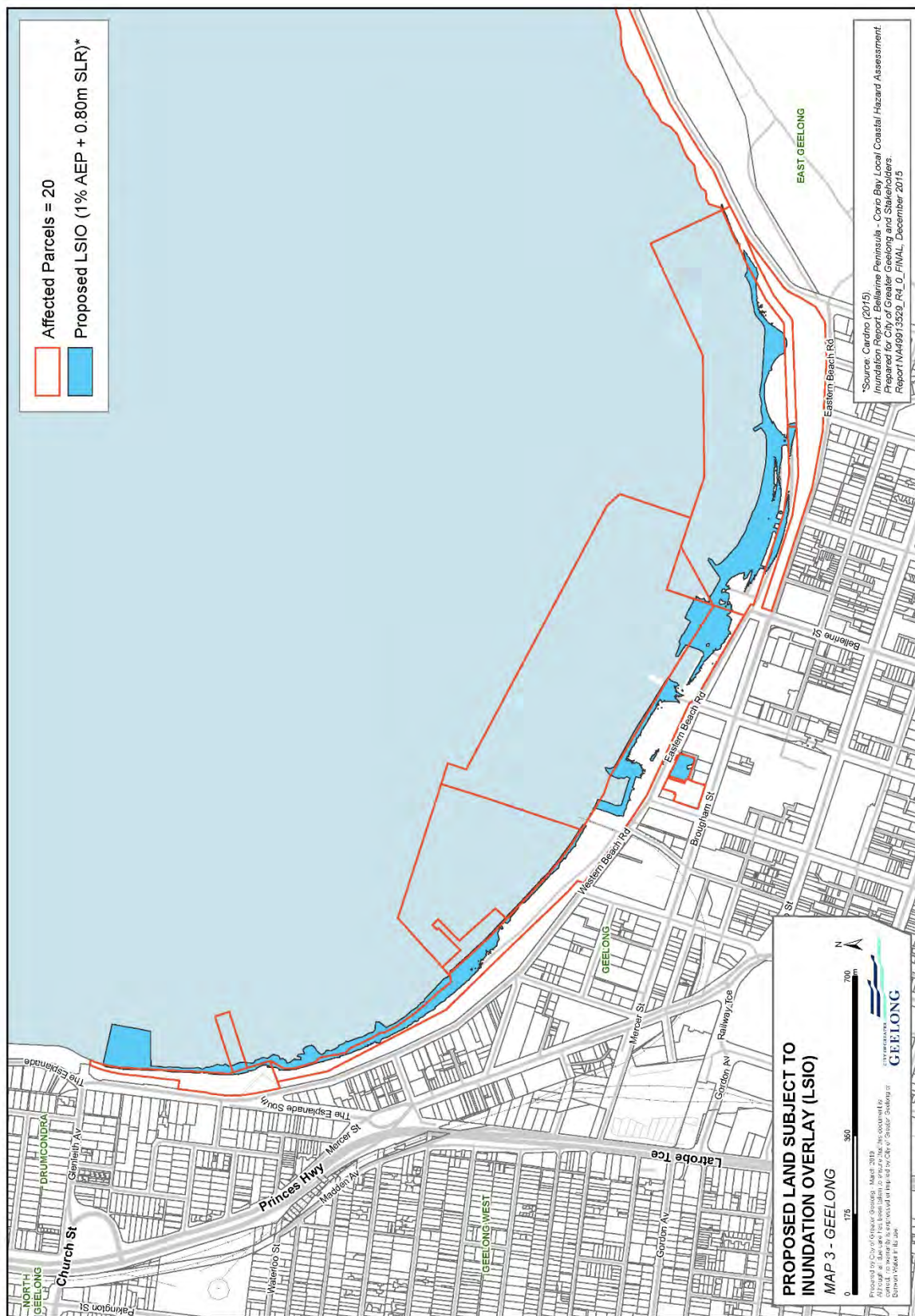
- The views of the Corangamite Catchment Management Authority
- *Bellarine Peninsula - Corio Bay Local Coastal Hazard Assessment - Inundation Report*, Cardno for City of Greater Geelong (Dec 2015)

Attachment 5 – Map of areas proposed for Land Subject to Inundation Overlay

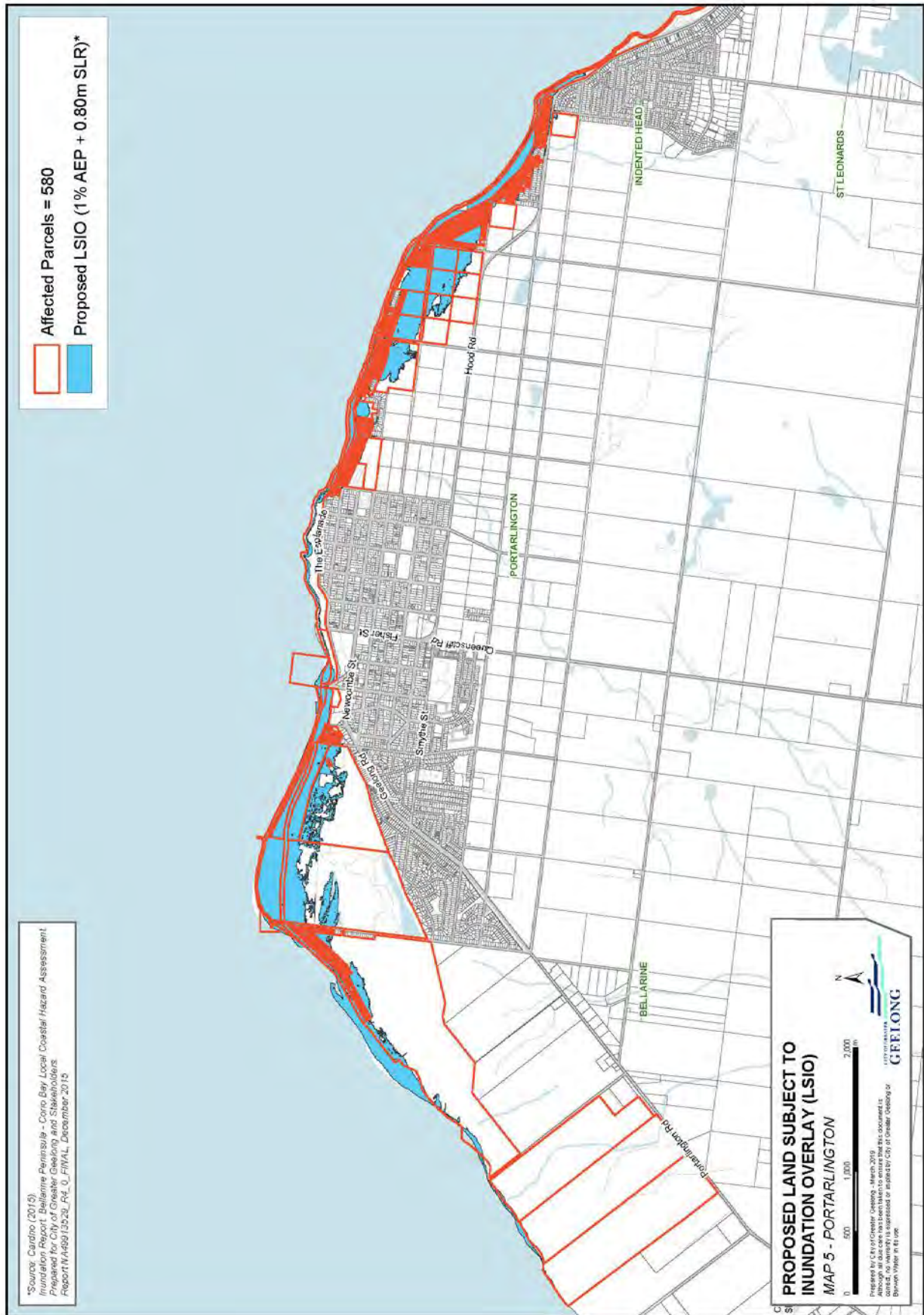




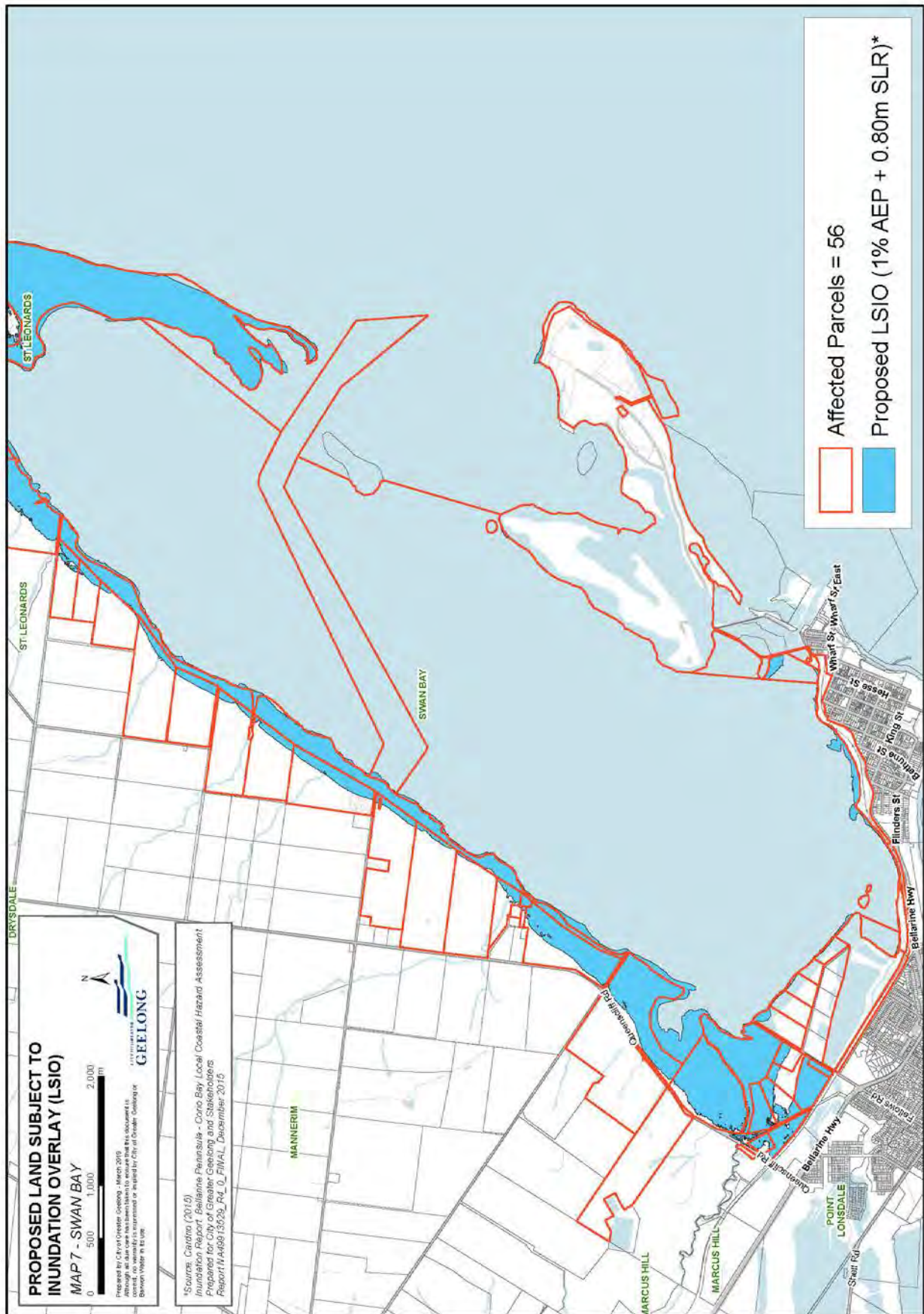


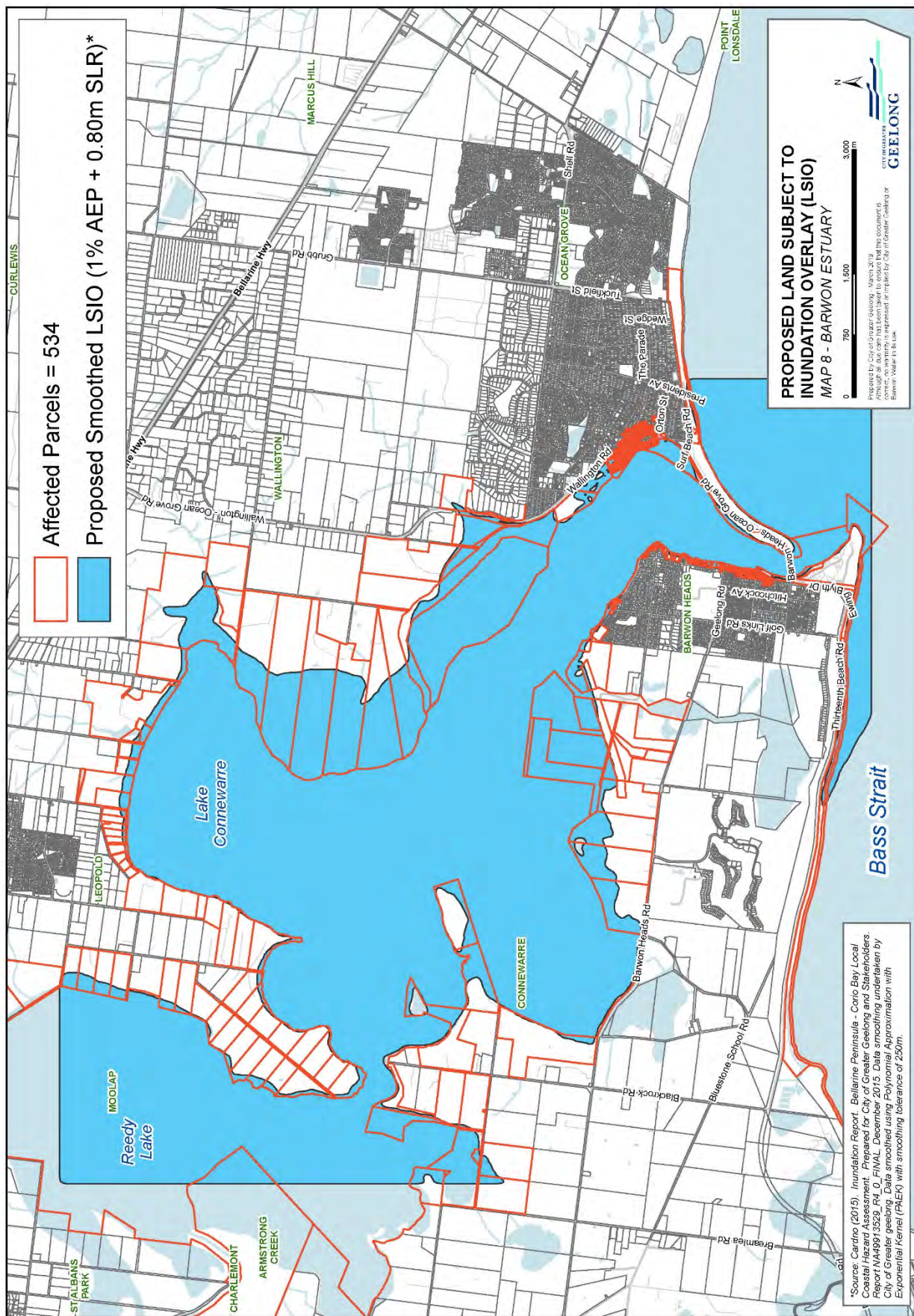


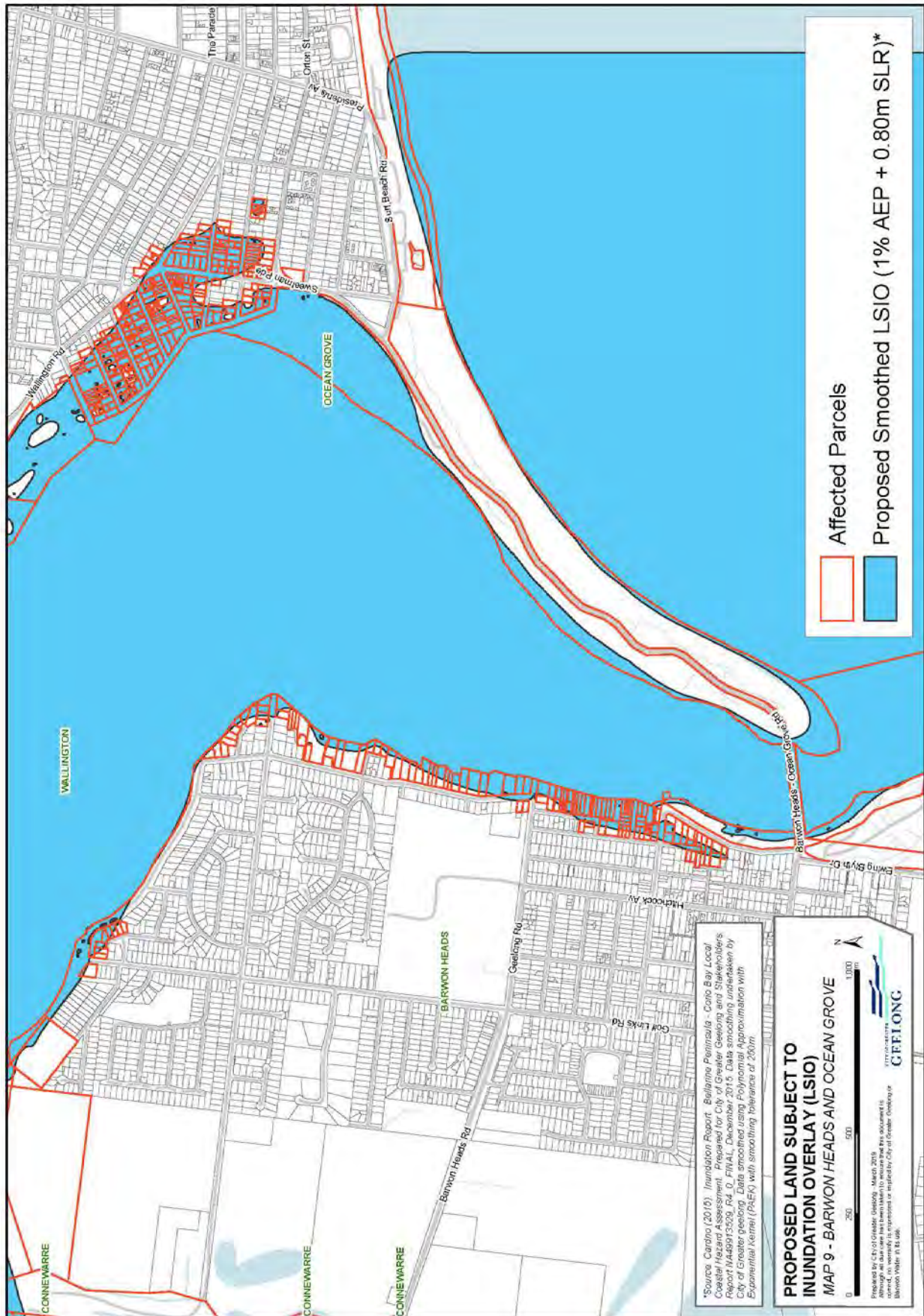


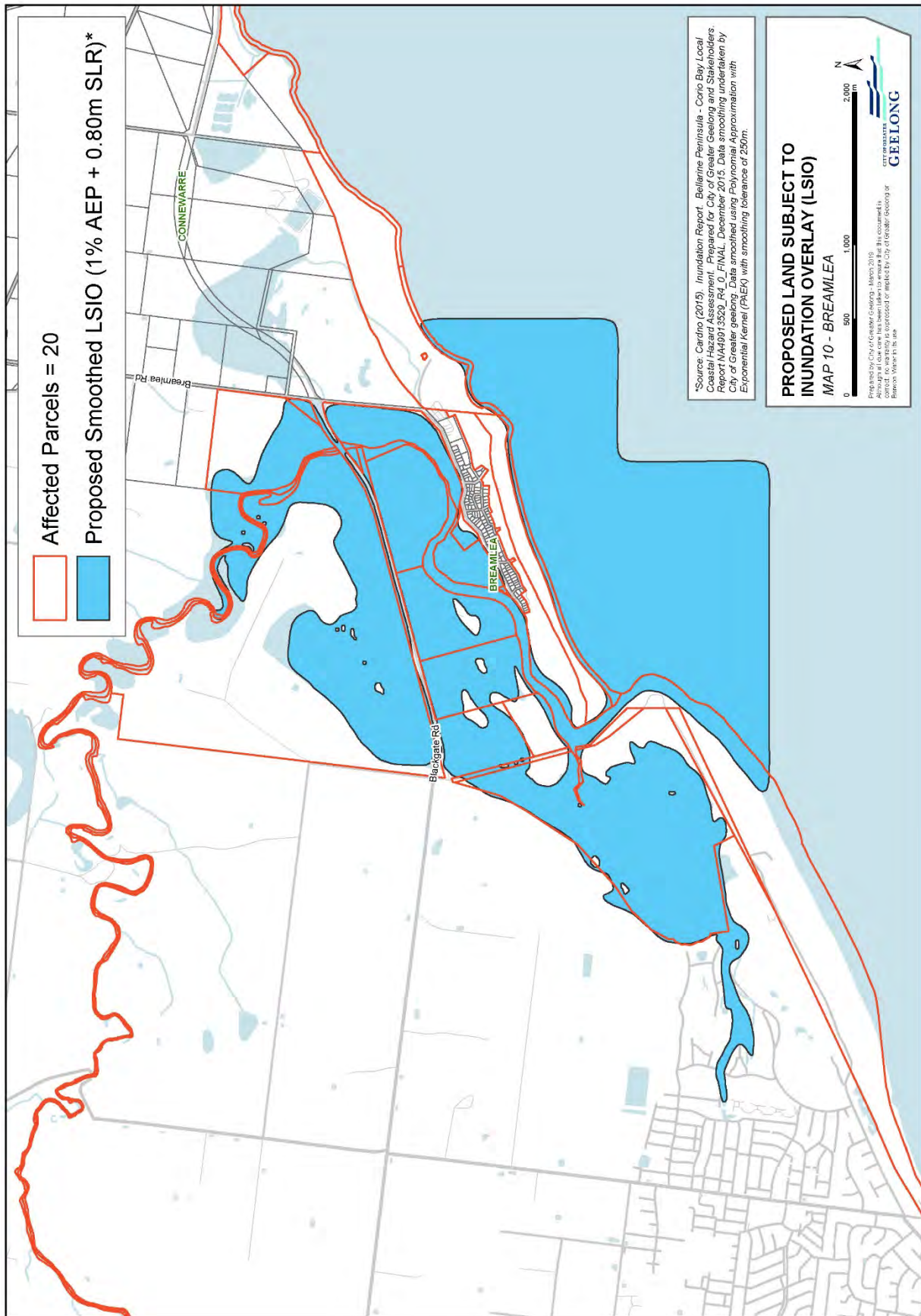












## **2. AMENDMENT C376 (PART 2) REMOVAL OF HERITAGE OVERLAY, BATESFORD QUARRY – CONSIDERATION OF SUBMISSIONS AND ADOPTION**

**Source:** Planning, Design & Development – Strategic Implementation  
**Director:** Gareth Smith  
**Portfolio:** Sustainable Development

### **Purpose**

1. To consider the outstanding submissions received in relation to Amendment C376 (Part 2) and seek adoption of the amendment.

### **Background**

2. Amendment C376 proposed a number of minor changes to the Greater Geelong Planning Scheme. The amendment was a 'bundled' amendment, to both correct errors and introduce a number of minor changes to the scheme ordinance and mapping.
3. Those elements of the amendment which received no objecting submissions were adopted by Council as Amendment C376 Part 1 on 23 October, 2018, with the balance of the amendment being deferred for further consideration as Amendment C376 Part 2.

### **Key Matters**

4. Having resolved the outstanding issues which were the basis for the remainder of the amendment being deferred, Council can now adopt the balance of the amendment as Amendment C376, Part 2.
5. Amendment C376 Part 2 relates to the deletion and alterations of heritage overlays for structures in and around the Batesford Quarry.
6. **Attachment 2** sets out the details of the outstanding submitters, the relevant matters raised in their submissions and the basis of the officer recommendation arising from discussion with the submitters about those submissions.
7. **Attachment 3** provides a detailed discussion of the history of and the basis for the recommendation for the deletion / alteration of the two listings from the schedule to the Heritage Overlay.

**Cr Mason moved, Cr Murrhy seconded -**

### **8. That Council:**

- 8.1 **Adopt Amendment C376 Part 2 in the form outlined in Attachment 4 of this report; and**
- 8.2 **Submit the adopted Amendment C376 Part 2 together with the prescribed information to the Minister for Planning requesting approval.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. There will be no significant financial implications for Council as a result of the adoption of this amendment.

### ***Community Engagement***

2. The amendment was exhibited in accordance with the provisions of the *Planning and Environment Act 1987* from 3 May 2018 to 4 June 2018, with four submissions received. Two matters remained to be considered following the adoption of Amendment C376 Part 1.
3. As those matters have now been resolved to the satisfaction of both the affected submitters the balance of the original amendment can now be adopted as Amendment C376 Part 2.

### ***Social Equity Considerations***

4. The amendment is largely policy neutral and there are no adverse social equity impacts.

### ***Policy/Legal/Statutory Implications***

5. The changes proposed by this amendment are essentially of a minor administrative nature. The amendment will result in good planning outcomes by ensuring that inaccurate application of overlay provisions do not result in unnecessary requirements for planning permits.

### ***Alignment to Council Plan***

6. The amendment supports the sustainable built and natural environment strategic direction of the Council Plan 2018-22 and is consistent with the strategic direction of community wellbeing and the priority of connected, creative and strong communities.

### ***Conflict of Interest***

7. No City officers or contractors who have provided advice in relation to this report have declared a conflict of interest regarding the matter under consideration.

### ***Risk Assessment***

8. No significant risks associated with implementing the recommendation contained in this report have been identified.

### ***Environmental Implications***

9. The proposed amendment will not have any adverse effects on the environment.

**Attachment 2**

**Summary of Submissions**

| No | Name  | Address                      | Type                            | Summary of Submission   | Officer Response   |
|----|---|------------------------------|---------------------------------|---|--|
| 2  | <b>Geelong and Region Branch National Trust of Australia (Victoria)</b> | P O Box 1512<br>Geelong 3220 | Supporting                      | “Supportive of most aspects outlined in Amendment C376.”<br>Requests investigation as to the following:<br>1/. Does HO1732 remain in the Planning scheme?   | 1/Officers have provided a response confirming that HO1732 is not part of or in any way affected by this amendment.<br>The City has received correspondence from the submitter advising that they are satisfied with the response.   |
| 4  | <b>TGM Group Pty Ltd</b><br>On behalf of Riverlee Heights Pty Ltd       | P O Box 1137<br>Geelong 3222 | Seeking to change the amendment | “If ... a representative section of the conveyor be retained, this should preferably be at ground level in an open space reserve or included in the existing Public Conservation and Resource Zoned land adjacent to the Moorabool River where the existing overlay is in place.” | Relates to the proposed change to the extent of the proposed extension of HO 1740.<br>Following consideration of the submission, the officer recommendation proposes that, consistent with the submission, Council not proceed to extend the application of HI1740 in the manner exhibited.<br>The City has received correspondence from the submitter advising that they are satisfied with this outcome. |

## **Attachment 3**

### ***Discussion***

1. The decision to prepare and exhibit the amendment was made by a delegated City officer on 2 March 2018. The amendment is a 'bundled' amendment, to both correct errors and introduce a number of minor changes to the Greater Geelong Planning Scheme ordinance and mapping.

### **Amendment C376 Part 2**

2. The following elements of the exhibited amendment were deferred at the time of adoption of Amendment C376 Part 1, in order to allow for further consideration and for consultation with objecting submitters, where required.
3. Land affected:
  - 3.1 Batesford Quarry
4. Detailed changes:
  - 4.1 The exhibited amendment proposed the following detailed changes to the Greater Geelong Planning Scheme.

#### *Planning Scheme Map Changes:*

- 4.2 Delete HO45 from the land at Batesford Quarry; and
- 4.3 Delete HO1740 from part of the land at Batesford Quarry, and apply HO1740 to another part of the land at Batesford Quarry, consistent with the remaining extent of the overhead conveyor structure.

#### *Planning Scheme Ordinance Changes:*

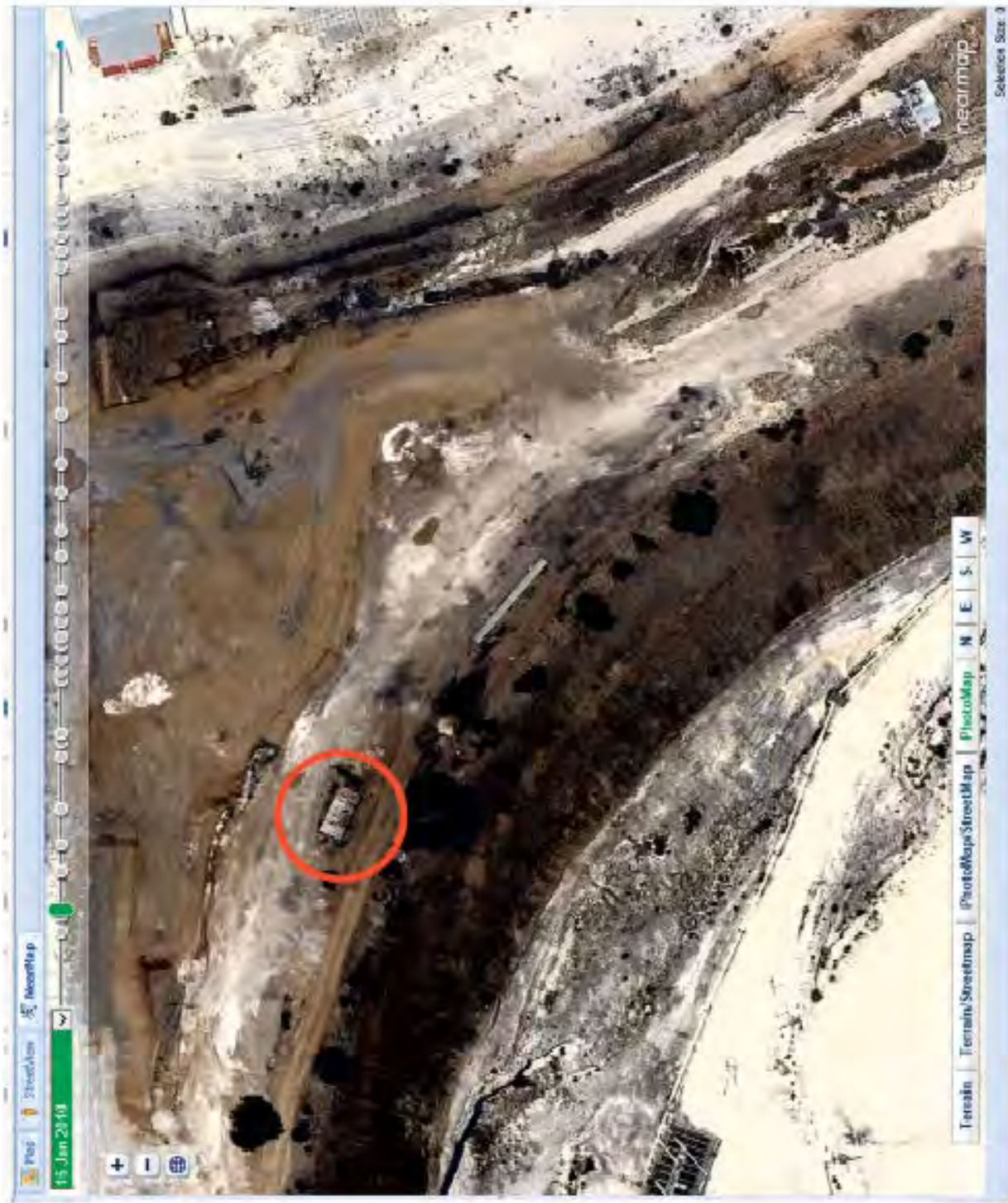
- 4.4 Amend the Schedule to Clause 43.01 to delete the entry for HO43.

### **Officer Consideration**

5. HO45 – Bachyrus Railroad Steam Shovel
  - 5.1 This is a large, 19th Century steam powered excavation shovel, mounted on rails to allow for movement along the face of the excavation works. The shovel mechanism swivels to permit the removal of material and its placement in vehicles for removal from the quarry;
  - 5.2 The shovel represents an antiquated form of mechanical excavation, which has long since been replaced by smaller, more manoeuvrable diggers powered by internal combustion engines. Consequently, the Bachyrus shovel had fallen into disrepair as a result of not having been used for many years;
  - 5.3 In order to facilitate the removal of product from the area occupied by the steam shovel and other redundant infrastructure, the shovel was removed from the land in 2010 and relocated to Lake Goldsmith, in the Pyrenees Shire, where it has been restored to operational condition; and
  - 5.4 The following four photos identify the chronology of the removal of the Bachyrus Steam Shovel and other redundant structures from the land between late 2009 and mid-2010, together with the subsequent extraction of material up until the present time.



**Nov. 2009 - Conveyor Infrastructure and Bachyrus Railroad Steam Shovel in situ**



**Jan 2010 – Conveyor infrastructure removed.**



**Jul 2010 – Bachyrus Railroad Steam Shovel Removed**



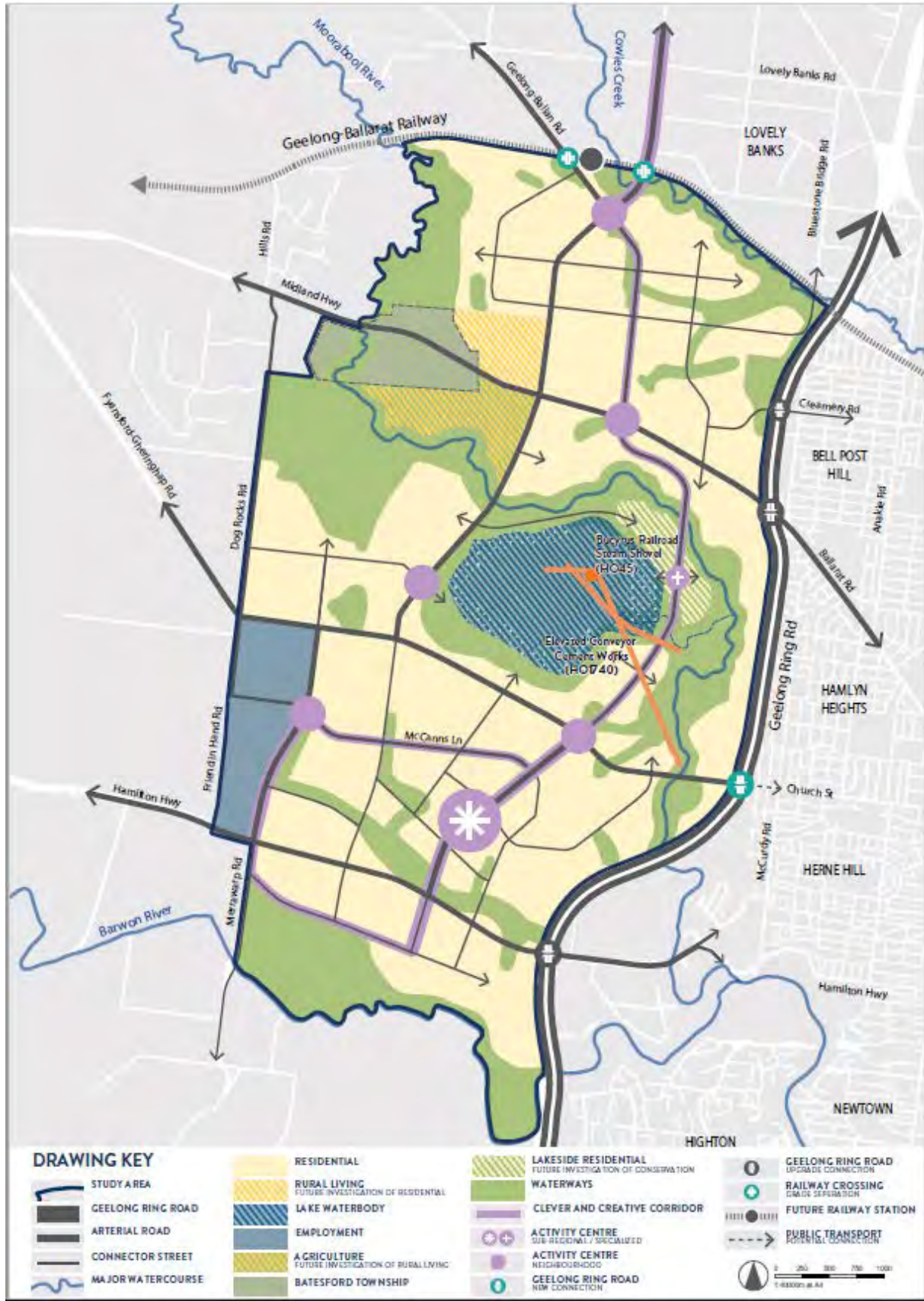
**Feb 2019 – Site now extensively mined no heritage significance remains.**

6. HO1740 – Elevated Conveyor structure

- 6.1 This structure of prefabricated concrete trestles and boxed spans was erected in the mid-20<sup>th</sup> century to convey material extracted from the quarry to the Geelong Cement Works which overlook Batesford from the escarpment, south east of the site;
- 6.2 As is evident from the preceding photos, the disused conveyor structure was removed from the land in early 2010 in order to facilitate the mining of the portion of the quarry which it occupied;
- 6.3 The only remaining spans of the conveyor which are currently located within the area protected by HO1740 are located on public land in the Public Conservation and Resource Zone (PCRZ). The conveyor spans the Moorabool river, and on the eastern side of the Moorabool River, between the river and the unconstructed portion of Church Street;
- 6.4 Both HO45 and the section of HO1740 which is to be deleted are located within the Western Growth Area. The plan of the growth area on the following page indicates the location of the heritage overlays which are to be removed. In particular, it is evident that both HO45 and the majority of HO1740 are located within a lake and water body which is proposed to be created in the existing quarry; and
- 6.5 The exhibited amendment had proposed to extend the application of HO1740 to remaining sections of the conveyor structure in the farming zone, between the eastern side of the Moorabool River and the Geelong Ring Road. However, following the consideration of an objecting submission lodged on behalf of the owner of this land, it is recommended that this not occur. The submitter has advised the City that this recommendation satisfies their objection.

7. Officer Assessment

- 7.1 In view of the previous removal of the heritage items from the land, it is considered that the continued application of HO45 and the section of HO1740, to the extent identified on the map which forms part of Attachment 3 to this report, is redundant, and that the identified areas of the mapped application of HO45 and HO1740 should be deleted from the planning scheme; and
- 7.2 Following discussions with the objecting submitter regarding the exhibited proposal to extend the application of HO1740, it is considered that this should not proceed.



**Redundant Heritage listings to be removed. Note location of the “Lake Waterbody” in the former quarry**

**Amendment to be Adopted**

**Attachment 4**

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*Planning and Environment Act 1987*

GREATER GEELONG PLANNING SCHEME

AMENDMENT C376 Part 2

INSTRUCTION SHEET

The planning authority for this amendment is the City of Greater Geelong.

The Greater Geelong Planning Scheme is amended as follows:

**Planning Scheme Maps**

The Planning Scheme Maps are amended by a total of 1 attached map sheets.

**Overlay Maps**

1. Amend Planning Scheme Map Nos. 31 HO, 32 HO & 36 HO in the manner shown on the attached map marked "Greater Geelong Planning Scheme, Amendment C376 part 2.

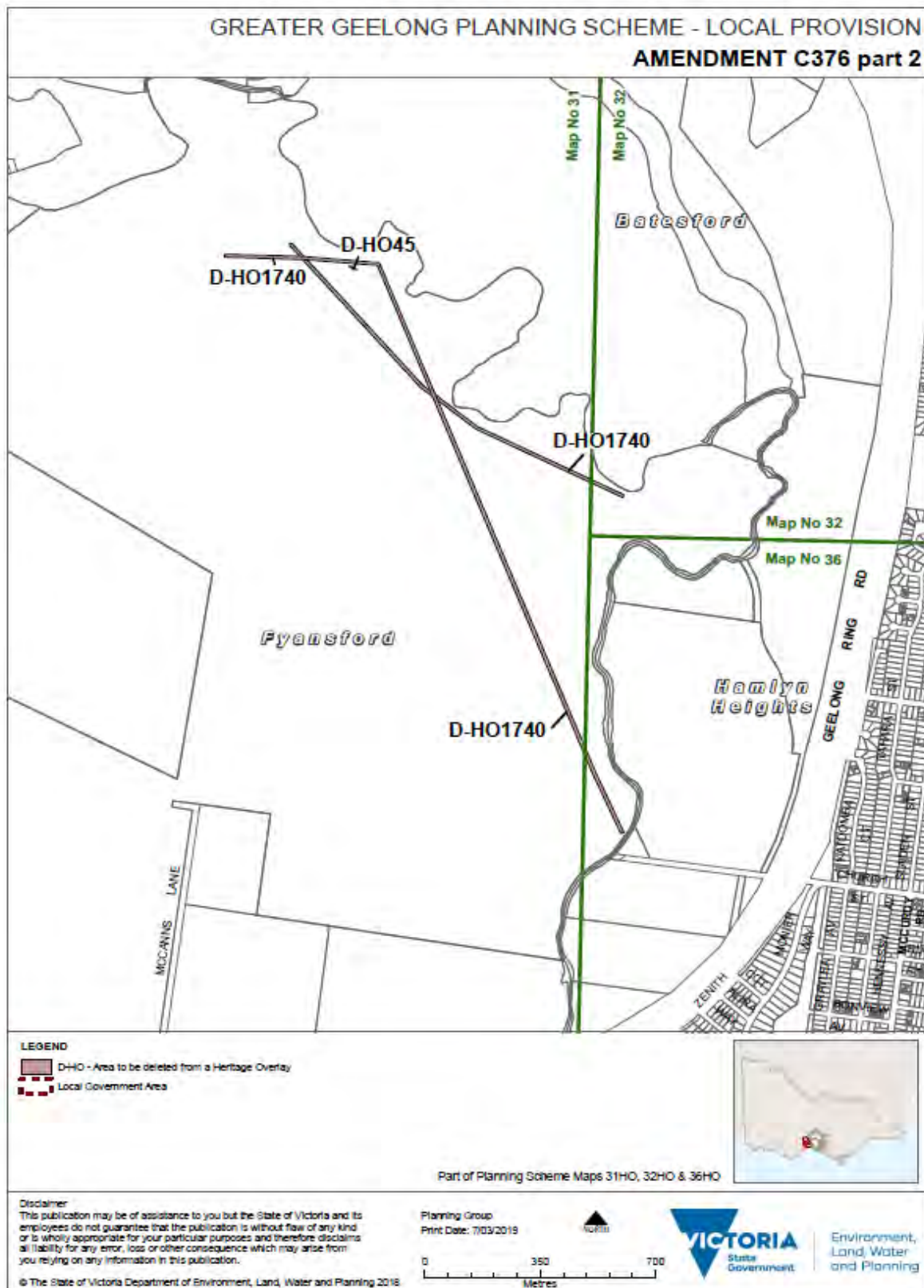
**Planning Scheme Ordinance**

The Planning Scheme Ordinance is amended as follows:

2. In Overlays – Clause 43.01 replace the Schedule with a new Schedule in the form of the attached document.

End of document

**Deletion HO45 and Part HO1740**



**Clause 43.01 – Extract of changes to Heritage Overlay**

Greater Geelong Planning Scheme

| PS Map Ref | Heritage Place  | External Paint Controls Apply? | Internal Alteration Controls Apply? | Tree Controls Apply? | Outbuilding s or fences not exempt under Clause 43.01-3 | Included on the Victorian Heritage Register under the Heritage Act, 1985? | Prohibited uses permitted? | Name of Incorporated Plan under Clause 43.01-2 | Aboriginal heritage place? |
|------------|---|--------------------------------|-------------------------------------|----------------------|---|---|----------------------------|--|----------------------------|
| HO1643     | Mercy's Foot Bridge c1968<br>Over Bowen River, Belmont          | Yes                            | No                                  | No                   | No  | No  | No                         |  | No                         |
| HO1645     | Bucyrus Rail Road Steam Shovel<br>Beechford Quarry<br>Beechford | -                              | -                                   | -                    | -   | Yes<br>Ref: No-415416   | No                         |  | No                         |
| HO236      | Stella Maris Convent<br>39 Bay Street, North Geelong            | Yes                            | No                                  | No                   | No  | No  | Yes                        |  | No                         |
| HO109      | "Baywater"<br>Residence,<br>4 Baywater Road,<br>Mairdoun        | No                             | No                                  | No                   | No  | No  | Yes                        |  | No                         |
| HO630      | Residence<br>16 Beach Parade,<br>Geelong West                   | No                             | No                                  | Yes                  | Yes- fence  | No  | No                         |  | No                         |
| HO632      | Residence<br>24 Beach Parade,<br>Geelong West                   | No                             | No                                  | No                   | Yes- fence  | No  | No                         |  | No                         |
| HO1508     | WW2 Stone<br>Bechers Road (off),<br>Drysdale                    | Yes                            | No                                  | No                   | No  | No  | No                         |  | No                         |

Greater Geelong Planning Scheme  
 Ordinance - Clause 43.01 - 8/2018/18  
 Page 19 of 207

### **3. FINANCIAL MANAGEMENT REPORT – MARCH 2019**

**Source:** Customer & Corporate Services – Financial Services  
**Director:** Michael Dugina  
**Portfolio:** Finance

#### **Purpose**

1. To present to Council the Financial Performance information to 31 March 2019.

#### **Background**

2. On 26 June 2018 the Final Budget was adopted with a recurrent deficit of (\$8.0m) and higher opening cash balance of \$81.6m. This recognised the early receipt in 2017-18 of expected 2018-19 Commonwealth Government Grants Commission funding (50% of allocation). On 28 August 2018 Council approved the carryover of capital and non-capital project funding into 2018-19.
3. This change known as 2018-19 projection was in response to funding allocated in 2017-18 for projects not completed, resulting in higher than expected opening cash balance of \$102.6m. The 2018-19 recurrent projection is an operating deficit of (\$17.3m) and non-recurrent surplus of \$78.8m. The 2018-19 full year projected net result is a surplus of \$61.5m.
4. The financial statements and commentary is for the period July 2018 – March 2019, which compares the budget projection with actual revenue and expense.

#### **Key Matters**

5. The recurrent operating result for the nine month period is a surplus of \$6.2m. The projected position was a deficit of (\$11.6m) so the result represents a better than anticipated outcome of \$17.8m. It is expected however that in the full year this surplus will reduce to our projected position of (\$7.0m) deficit. A summary of the year to date variances are provided in **Attachment 1** of this report.
6. Capital expenditure year to date is \$80.8m against a projection of \$93.2m. It is anticipated that there will be a carryover figure of \$26.5m (as budgeted) for works not completed by the end of the financial year. This figure will be reviewed during the final quarter of 2018-19. A summary of capital expenditure variances is provided on **Attachment 1** of this report.
7. The cash and investment balance of \$97.9m is \$15.9m lower than expected at this stage of the year mainly due to new loans not being taken out, partly offset by capital spend behind schedule. A summary of the cash and investments is provided on **Attachment 1** of this report.
8. The non-recurrent result (e.g. gifted assets from development, sale of properties, developer cash contributions to infrastructure etc.) for the half year period was a surplus of \$73.8m. This was \$26.5m favourable to the anticipated position. At the end of the year it is expected that the position will be \$29.6m better than anticipated. A summary of the non-recurrent variances is provided on **Attachment 1** of this report.
9. There were no environmental upgrade agreements entered into for the quarter. The existing agreement is valued at \$115k.

**Cr Murnane moved, Cr Nelson seconded -**

- 10. That Council endorse the Financial Report to 31 March 2019.**

**Carried.**

## Attachment 1

### Discussion

1. The 2018-19 full year projected net result is a surplus of \$61.5m. Refer following Table:

|   | Expenditure<br>\$'000 | Income<br>\$'000 | Surplus/<br>(Deficit)<br>\$'000 | Opening<br>Cash<br>Balance |
|---|-----------------------|------------------|---------------------------------|----------------------------|
| <b>Council Draft 2018-19 Budget<br/>- Recurrent Surplus/(Deficit)</b>   | <b>354,553</b>        | <b>356,831</b>   | <b>2,278</b>                    | <b>\$63.7m</b>             |
| Grants Commission 2018-19 - 50% received<br>in 2017-18                  |                       | (10,271)         | (10,271)                        |                            |
| <b>Council adopted 2018-19 Budget<br/>- Recurrent Surplus/(Deficit)</b> | <b>354,553</b>        | <b>346,560</b>   | <b>(7,993)</b>                  | <b>\$81.6m</b>             |
| 2017-18 Non Capital Carryover Requests                                  | 9,360                 | 79               | (9,281)                         |                            |
| <b>2018-19 Recurrent Projection</b>                                     | <b>363,913</b>        | <b>346,639</b>   | <b>(17,274)</b>                 | <b>\$102.6m</b>            |
| <b>Non Recurrent Surplus/(Deficit)</b>                                  | <b>6,190</b>          | <b>84,989</b>    | <b>78,799</b>                   |                            |
| <b>Net Result Surplus/(Deficit)</b>                                     | <b>370,103</b>        | <b>431,628</b>   | <b>61,525</b>                   |                            |

2. The March 2019 management reports are provided in the following table to report year-to-date performance and full-year forecast performance versus projection.

| <b>Summary</b>                     |                      |                          |                                   |                         |                       |                                  |
|------------------------------------|----------------------|--------------------------|-----------------------------------|-------------------------|-----------------------|----------------------------------|
|                                    | YTD<br>Actual<br>\$m | YTD<br>Projection<br>\$m | YTD Var<br>Fav/<br>(Unfav)<br>\$m | FY<br>Projection<br>\$m | FY<br>Forecast<br>\$m | FY Var<br>Fav/<br>(Unfav)<br>\$m |
| Recurrent<br>Surplus/(Deficit)     | 6.25                 | (11.55)                  | 17.80                             | (17.27)                 | (6.97)                | 10.30                            |
| Non-Recurrent<br>Surplus/(Deficit) | 73.80                | 47.30                    | 26.50                             | 78.80                   | 108.48                | 29.68                            |
| Net Surplus/(Deficit)              | 80.05                | 35.75                    | 44.30                             | 61.52                   | 101.50                | 39.98                            |
| Capital Expenditure                | 80.75                | 93.20                    | 12.45                             | 127.22                  | 131.10                | (3.88)                           |
| Closing Net Cash<br>Positive/(Neg) | 97.85                | 113.71                   | (15.86)                           | 92.22                   |                       |                                  |

| <b>Recurrent Variance Commentary</b>      |                      |                          |                                   |                         |                       |                                  |
|---|----------------------|--------------------------|-----------------------------------|-------------------------|-----------------------|----------------------------------|
|   | YTD<br>Actual<br>\$m | YTD<br>Projection<br>\$m | YTD Var<br>Fav/<br>(Unfav)<br>\$m | FY<br>Projection<br>\$m | FY<br>Forecast<br>\$m | FY Var<br>Fav/<br>(Unfav)<br>\$m |
| Recurrent Income                          | 267.91               | 260.80                   | 7.11                              | 346.64                  | 353.56                | 6.92                             |
| Recurrent Expenditure                     | 261.67               | 272.36                   | 10.69                             | 363.91                  | 360.53                | 3.38                             |
| Recurrent Surplus/(Deficit)               | 6.25                 | (11.55)                  | 17.80                             | (17.27)                 | (6.97)                | 10.30                            |
| <b>YTD Variance - \$17.80m Favourable</b> |                      |                          |                                   |                         |                       |                                  |

3. The following major variances contributed to this result:

**Recurrent Income**

|  | Actual YTD<br>\$m | Variance<br>Fav/(Unfav)<br>\$m |
|--|-------------------|--------------------------------|
| <b>General Rates and Charges</b> – Supplementary rates<br>\$1,026k favourable, in addition to other favourable rates generation YTD, expected to be partly offset by objections in full year.  | 172.05            | 1.53                           |
| <b>Government Grants</b>   |                   |                                |
| Main favourable variances consist of:  | 34.47             | 2.09                           |
| <ul style="list-style-type: none"> <li>• Federal recurrent \$1,435k favourable – Community Care \$1,433k (<i>Home Care Packages \$1,131k and Commonwealth Home Support Program \$248k</i>).</li> <li>• State specific purpose \$992k favourable – Phasing variance in City Services Admin \$60k. Unbudgeted grants received – <i>Bell Park Soccer Club \$225k, Lara Flood Study \$157k, Storm water Service Strategy \$100k, SHIP Housing Strategy \$100k, Agribusiness Strategy \$75k, Geelong Regional Bowls Facility \$65k, Geelong After Dark \$60k and St Helens Seawall Remediation \$50k.</i></li> <li>• State recurrent \$492k favourable – Family Services \$189k (<i>Community Child Health</i>). <i>Unbudgeted grant received – Vic Roads School Grant – School Crossing Supervisor Subsidy</i>) \$304k.</li> </ul> |                   |                                |
| Offset by:   |                   |                                |
| <ul style="list-style-type: none"> <li>• Federal child care assistance (\$662k) unfavourable – Family Services (\$699k) (<i>Whittington LDC \$604k &amp; Family Day Care \$212k, offset by Integrated Children Centres \$225k favourable</i>).</li> <li>• Federal – Other (\$195k) unfavourable – Grants Commission funding unfavourable.</li> </ul>   |                   |                                |
| <b>User Charges</b>  | 43.06             | 1.14                           |
| Main favourable variances consist of:  |                   |                                |
| <ul style="list-style-type: none"> <li>▪ Waste Services – \$1,492k favourable – Disposal \$759k (<i>Drysdale Landfill Operations</i>) and Collection \$733k (<i>North Geelong transfer station \$656k and Commercial Collection Services \$84k</i>).</li> <li>▪ Development Planning \$860k favourable – <i>Subdivision application fees</i>.</li> </ul>   |                   |                                |
| Offset by:   |                   |                                |
| <ul style="list-style-type: none"> <li>▪ Leisure &amp; Recreation (\$796k) unfavourable (<i>Arena \$252k, Waterworld \$136k, Corio Leisuretime \$118k and Golf Courses \$89k</i>) and City Works (\$316k) (<i>SZ Reinstatements</i>)</li> </ul>  |                   |                                |

|   | Actual YTD<br>\$m | Variance<br>Fav/(Unfav)<br>\$m |
|---|-------------------|--------------------------------|
| <b>Other Fees &amp; Charges</b>   | 11.56             | 1.70                           |
| Favourable mainly due to:   |                   |                                |
| <ul style="list-style-type: none"> <li>▪ Fines and Costs \$979k favourable – General cost overrun \$782k, offset by expenditure, Fire Prevention \$122k and Council Election penalties \$110k.</li> <li>▪ Planning and building permit applications \$849k favourable.</li> </ul> |                   |                                |
| <b>Sundry Income</b>  | 5.36              | 0.67                           |
| <ul style="list-style-type: none"> <li>▪ Unbudgeted miscellaneous income received.</li> </ul>   |                   |                                |
| <b>Interest on Investments</b>  | 1.41              | (0.02)                         |
| <b>Recurrent Income Sub-total</b>   | <b>\$267.91m</b>  | <b>\$7.11m</b>                 |

**Recurrent Expenditure**

|   | Actual YTD<br>\$m | Variance<br>Fav/(Unfav)<br>\$m |
|---|-------------------|--------------------------------|
| <b>Employee related expenditure</b> – Favourable salary related costs \$6,851k mainly relating to unfilled vacancies. Offset by unfavourable supplementary labour costs (\$6,045k) (see external services).   | 107.00            | 6.93                           |
| <b>General Works:</b>   | 87.20             | 0.07                           |
| <p><i>Materials</i> \$804k favourable with the main variances being Road making materials \$1,207k and cleaning \$163k (<i>both phasing only</i>), offset by consumable materials (\$740k) unfavourable (<i>Home Care Packages</i>).</p> <p><i>Plant / Equip / Vehicle Costs</i> \$882k favourable with the main variances being External plant &amp; equipment hire \$568k, Minor Plant &amp; Equipment \$162k and Vehicle Maintenance \$113k (<i>all phasing</i>).</p> <p><i>External Services</i> is (\$1,775k) unfavourable mainly due to:</p> <ul style="list-style-type: none"> <li>• Contractors \$4,956k favourable - Phasing variances in discretionary projects \$2,199k (incl \$1,068k unbudgeted for General cost overrun (partly offset in income) and in recurrent projects \$2,757k.</li> <li>• Contributions \$744k favourable - phasing variances mainly in Events Services \$445k and Developer Contribution Plans \$327k (<i>Armstrong Creek East</i>).</li> </ul> |                   |                                |

|   | Actual YTD<br>\$m | Variance<br>Fav/(Unfav)<br>\$m |
|---|-------------------|--------------------------------|
| Offset by:  |                   |                                |
| <ul style="list-style-type: none"> <li>Supplementary labour (\$6,045k) unfavourable – mainly in Community Care (\$2,287k), City Works (\$906k), Engineering (\$600k), City Development (\$587k), Parks &amp; Gardens (\$512k), Waste (\$297k), Health &amp; Local Laws (\$248k), Property &amp; Procurement (\$195k) and Central Geelong &amp; Waterfront (\$143k).</li> <li>Waste Disposal &amp; Recycling (\$907k) unfavourable - Garbage Service (\$1,282k), North Geelong Transfer Station (\$1,032k), Litter Service (\$138k) and Commercial Collection (\$106k) (due to diversion of waste to Wyndham), partly offset by Green Waste Service \$1,024k fav (low tonnages in winter &amp; dry summer) and Recycling Service \$739k fav.</li> <li>Building Maintenance (\$657k) unfavourable.</li> </ul> |                   |                                |
| <b>Administration</b> costs \$376k favourable mainly due to:  | 9.02              | 0.38                           |
| <ul style="list-style-type: none"> <li>Favourable Interest Paid \$502k, Training &amp; Development \$431k and Printing \$107k, partly offset by unfavourable Doubtful Debts (\$612k) unfavourable (<i>Local Laws - Infringements</i>) and Computer Software (\$111k).</li> </ul>  |                   |                                |
| <b>Professional Services</b> costs \$783k favourable mainly due to:   | 4.81              | 0.78                           |
| <ul style="list-style-type: none"> <li>Favourable phasing variances in Consultants \$1,301k, partly offset by Legal expenses (\$595k) unfavourable.</li> </ul>  |                   |                                |
| <b>Utility</b> costs are \$831k favourable mainly due to phasing and timing of invoices related to Electricity \$755k, Gas \$344k and Communications \$221k, partly offset by Water (\$490k) – dry summer months.   | 8.16              | 0.83                           |
| <b>Depreciation</b> costs \$1,223k favourable (timing of capitalisations).  | 45.95             | 1.22                           |
| <b>(Gain)/Loss on Sale of Plant and Equipment</b> \$475k  | (0.47)            | 0.48                           |
| favourable.   |                   |                                |
| <b>Recurrent Expenditure Sub-total</b>  | <b>\$261.67m</b>  | <b>\$10.69m</b>                |

**Recurrent Full Year Forecast**

- The 2018-19 full year recurrent forecast shows a deficit of (\$6.97m), which is an improvement of \$10.30m against projection, based on the year to date favourability as outlined in section 3 (above). An increase in expenditure during Q4 is expected, due to the appointment of additional FTE's, a higher volume of invoicing (prior year trend suggests this) and the increased focus on accruing external expenditure prior to year.

| <b>Non Recurrent Variance Commentary</b>  |                |                    |                          |                   |                 |                         |
|---|----------------|--------------------|--------------------------|-------------------|-----------------|-------------------------|
|   | YTD Actual \$m | YTD Projection \$m | YTD Var Fav/ (Unfav) \$m | FY Projection \$m | FY Forecast \$m | FY Var Fav/ (Unfav) \$m |
| Non-Recurrent Surplus/(Deficit)           | 73.80          | 47.30              | 26.50                    | 78.80             | 108.48          | 29.68                   |
| <b>YTD Variance – \$26.50m favourable</b> |                |                    |                          |                   |                 |                         |

5. The following variances contributed to this result:

|   | Actual YTD \$m | Variance Fav/(Unfav) \$m |
|---|----------------|--------------------------|
| <b>Subdivision gifted assets</b>          | 56.17          | 22.42                    |
| <b>Capital grants &amp; income</b>        | 15.52          | 0.92                     |
| <b>Developer contributions</b>            | 4.29           | 0.87                     |
| <b>Gain/(Loss) on sale of property</b>    | (0.12)         | (0.28)                   |
| <b>Loss on disposal of infrastructure</b> | (1.08)         | 3.56                     |
| <b>Prior Year Adjustments</b>             | (0.98)         | (0.98)                   |
|   | <b>\$73.80</b> | <b>\$26.50</b>           |

**Non Recurrent Full Year Forecast**

6. The 2018-19 full year non recurrent forecast has improved by \$29.68m to a surplus of \$108.48m, due to the higher than expected recognition of subdivision infrastructure \$22.4m, higher capital grants received over the full year \$4.5m and an increase in the gain on sale of property \$1.9m (*mainly relating to unbudgeted sales of 702 Grubb Rd, Drysdale and the Geelong Ring Road Employment Precinct*).
7. The full year net operating forecast is \$101.50m, an increase of \$39.98m.

|                                    | Annual Projection \$'000 | Annual Forecast \$'000 | Movement \$'000 |
|------------------------------------|--------------------------|------------------------|-----------------|
| Recurrent Income                   | 346,639                  | 353,558                | 6,919           |
| Recurrent Expenses                 | 363,913                  | 360,533                | 3,380           |
| <b>Recurrent Surplus/(Deficit)</b> | <b>(17,274)</b>          | <b>(6,975)</b>         | <b>10,299</b>   |
| Non Recurrent Surplus/(Deficit)    | 78,799                   | 108,482                | 29,683          |
| <b>Net Surplus/(Deficit)</b>       | <b>61,525</b>            | <b>101,507</b>         | <b>39,982</b>   |

| <b>Capital Expenditure Variance Commentary</b> |                |                    |                          |                   |                 |                         |
|--|----------------|--------------------|--------------------------|-------------------|-----------------|-------------------------|
|  | YTD Actual \$m | YTD Projection \$m | YTD Var Fav/ (Unfav) \$m | FY Projection \$m | FY Forecast \$m | FY Var Fav/ (Unfav) \$m |
| Capital Expenditure                            | 80.75          | 93.20              | 12.45                    | 127.22            | 131.10          | (3.88)                  |
| <b>YTD Variance – \$12.46m favourable</b>      |                |                    |                          |                   |                 |                         |

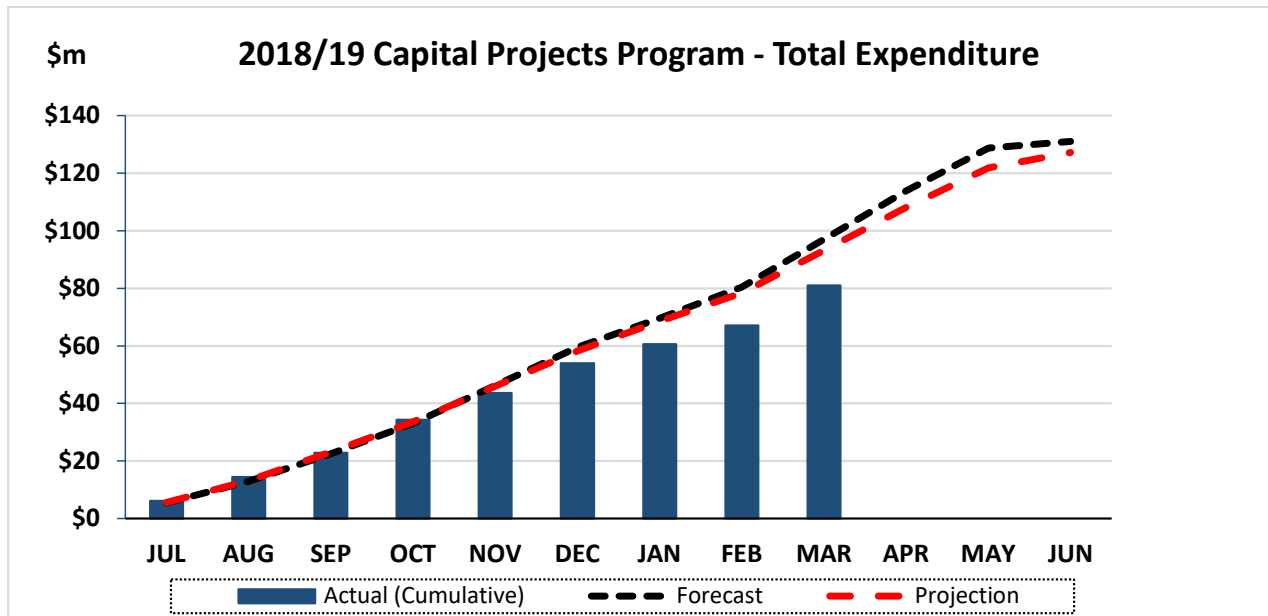
8. The capital program is \$12.46m underspent, with the major project variances as follows:

|  | <b>\$m</b>       |
|--|------------------|
| • Fleet Replacement                              | 1.91             |
| • Land Acquisition Fyansford                     | 1.70             |
| • Elcho Channel SRC Scheme                       | 1.62             |
| • Building renewal works                         | 1.31             |
| • Building Better Bike Connections               | 1.16             |
| • Leopold Community Hub Stage 2                  | 0.93             |
| • Drainage Construction                          | 0.92             |
| • Osborne House Remedial Works                   | 0.70             |
| • Drysdale Integrated Children's & Family Centre | 0.63             |
| • Rosewall Community Hub                         | 0.55             |
| • Beach house landlord works                     | 0.50             |
| • IT Asset Replacement                           | 0.50             |
| • Purnell Road CFC                               | (1.16)           |
| • Other  | 1.19             |
|  | <b>\$ 12.46m</b> |

9. Forecast changes to capital projects at 31 March 2019, recommended by the Capital Works Project Group and approved by the CEO.

| <b>Project ID</b> | <b>Name</b>   | <b>Transfer Amount</b> | <b>From</b>  | <b>Date CWPG Recommended</b> |
|-------------------|---|------------------------|--|------------------------------|
| C19404            | Lara Soccer Pavilion                                | \$165,000              | Fund from \$250k savings on Flinders Peak (C16807)                             | 28/08/2018                   |
| C19424            | Griggs Creek  | \$100,000              | To take from overall capital program savings                                   | 28/08/2018                   |
| C15812            | Western Beach Park                                  | \$120,000              | Transfer from saving on C18422 Eastern Beach footpath                          | 25/09/2018                   |
| C13857            | Corio Landfill Rehabilitation                       | \$100,000              | Savings as per CPWG  | 14/11/2018                   |
| C15841            | Leopold Community Hub Stage 2                       | \$540,000              | Savings as per CPWG  | 14/11/2018                   |
| C17201            | Drysdale Landfill Cell 5                            | \$650,000              | Savings as per CPWG  | 14/11/2018                   |
| C68051            | ACEP NAC Community Complex                          | \$700,000              | Savings as per CPWG  | 14/11/2018                   |
| C68204            | DCP- Barwon Heads Rd to Harriot Rd land Acquisition | \$1,684,661            | Savings as per CPWG (Harriot Rd Drainage Project funded in 2019-20 at \$1.25m) | 14/11/2018                   |
| C19201            | Waterworld Canopy                                   | \$240,000              | Savings as per CPWG  | 14/11/2018                   |
| C19303            | Innovation Drive GREP                               | \$280,000              | Savings as per CPWG  | 17/01/2019                   |
| C19423            | Belmont Depot Washbay                               | (\$206,000)            | Increase as per CPWG   | 17/01/2019                   |
| C19419            | Bell Post Hill Sport & Rec Club Kitchen Upgrade     | (\$95,000)             | Increase as per CPWG   | 14/02/2019                   |

10. Carryover of expenditure to 2019-20 on incomplete projects as at 30 June 2019 is projected to be as budgeted \$26.5m and this will be further reviewed during the fourth quarter.
11. The graph below summarises total capital gross expenditure to date compared to budget and projection.



***Environmental Upgrade Agreements***

12. An environmental upgrade agreement was entered into for Lot 2 on Plan Subdivision 041455, Volume 08704 Folio 526.
13. Council only has one environmental upgrade agreement in place.
14. The total charge for this agreement is \$115k and all payments that have fallen due have been remitted.
15. The total value of payments that are yet to fall due is \$95k.

**DETAILED OPERATING STATEMENT**

As at 31 March 2019

| Adopted Budget \$000s |   | Month         | Month             | YTD            | YTD               | YTD             | Full Yr           | Forecast       | Full Yr         |
|-----------------------|---|---------------|-------------------|----------------|-------------------|-----------------|-------------------|----------------|-----------------|
|                       |   | Actual \$000s | Projection \$000s | Actual \$000s  | Projection \$000s | Variance \$000s | Projection \$000s | Actual \$000s  | Variance \$000s |
|                       | <b>RECURRENT INCOME</b>                       |               |                   |                |                   |                 |                   |                |                 |
| 227,286               | Rates and Charges                             | 19,121        | 19,028            | 172,053        | 170,526           | 1,526           | 227,286           | 228,313        | 1,027           |
| 43,135                | Government Grants                             | 3,850         | 2,609             | 34,470         | 32,378            | 2,092           | 43,214            | 45,244         | 2,030           |
| 55,005                | User Charges                                  | 4,702         | 4,529             | 43,064         | 41,929            | 1,135           | 55,005            | 56,241         | 1,236           |
| 13,434                | Other Fees and Charges                        | 1,454         | 1,348             | 11,563         | 9,860             | 1,704           | 13,434            | 15,220         | 1,786           |
| 5,799                 | Sundry Income                                 | 422           | 397               | 5,350          | 4,684             | 666             | 5,799             | 6,654          | 855             |
| 1,901                 | Interest Investments                          | 249           | 158               | 1,411          | 1,426             | (15)            | 1,901             | 1,886          | (15)            |
| <b>346,560</b>        | <b>TOTAL RECURRENT INCOME</b>                 | <b>29,799</b> | <b>28,070</b>     | <b>267,911</b> | <b>260,803</b>    | <b>7,109</b>    | <b>346,639</b>    | <b>353,558</b> | <b>6,919</b>    |
|                       | <b>RECURRENT EXPENDITURE</b>                  |               |                   |                |                   |                 |                   |                |                 |
|                       | <i>Employee Related</i>                       |               |                   |                |                   |                 |                   |                |                 |
| 148,872               | Salaries                                      | 11,927        | 12,130            | 105,266        | 112,117           | 6,851           | 149,197           | 143,270        | 5,927           |
| 2,407                 | Workcover                                     | 221           | 195               | 1,736          | 1,811             | 75              | 2,412             | 2,337          | 75              |
|                       | <i>Goods and Services</i>                     |               |                   |                |                   |                 |                   |                |                 |
| 9,614                 | General Works - Materials                     | 781           | 803               | 6,663          | 7,466             | 804             | 9,690             | 8,926          | 764             |
| 7,757                 | General Works - Plant/Equipment/Vehicle Costs | 493           | 613               | 5,028          | 5,910             | 882             | 7,798             | 6,921          | 877             |
| 93,593                | General Works - External Services             | 7,333         | 7,585             | 75,504         | 73,890            | (1,614)         | 99,650            | 105,279        | (5,629)         |
| 12,150                | Administration                                | 864           | 1,275             | 9,019          | 9,394             | 376             | 12,465            | 12,084         | 381             |
| 5,272                 | Professional Services                         | 436           | 641               | 4,814          | 5,597             | 783             | 7,813             | 7,402          | 411             |
| 11,988                | Utilities                                     | (1,728)       | 1,040             | 8,158          | 8,990             | 832             | 11,988            | 11,415         | 573             |
| 62,893                | Depreciation                                  | 5,139         | 5,241             | 45,947         | 47,170            | 1,223           | 62,893            | 62,893         | 0               |
| (7)                   | Gain/(Loss) on Sale of Plant & Equipment      | 218           | 0                 | 468            | (7)               | 475             | (7)               | (7)            | 0               |
| <b>354,554</b>        | <b>TOTAL RECURRENT EXPENDITURE</b>            | <b>25,249</b> | <b>29,524</b>     | <b>261,667</b> | <b>272,353</b>    | <b>10,686</b>   | <b>363,913</b>    | <b>360,533</b> | <b>3,380</b>    |
| <b>(7,993)</b>        | <b>RECURRENT SURPLUS/(DEFICIT)</b>            | <b>4,550</b>  | <b>(1,454)</b>    | <b>6,245</b>   | <b>(11,550)</b>   | <b>17,795</b>   | <b>(17,274)</b>   | <b>(6,975)</b> | <b>10,299</b>   |
|                       | <b>NON-RECURRENT INCOME</b>                   |               |                   |                |                   |                 |                   |                |                 |
| 45,000                | Subdivision Gifted Assets                     | 2,843         | 3,750             | 56,168         | 33,750            | 22,418          | 45,000            | 67,418         | 22,418          |
| 31,320                | Capital Grants and Income                     | 2,016         | 555               | 15,515         | 14,597            | 918             | 32,274            | 36,794         | 4,520           |
| 4,570                 | Developer Contributions                       | 60            | 381               | 4,292          | 3,428             | 865             | 4,570             | 5,435          | 865             |
| 0                     | Insurance Recovery                            | 0             | 0                 | 0              | 0                 | 0               | 0                 | 0              | 0               |
| 3,145                 | Gain/(Loss) on Sale of Property               | 0             | 0                 | (117)          | 167               | (284)           | 3,145             | 5,025          | 1,880           |
| <b>84,035</b>         | <b>TOTAL NON-RECURRENT INCOME</b>             | <b>4,919</b>  | <b>4,686</b>      | <b>75,859</b>  | <b>51,942</b>     | <b>23,917</b>   | <b>84,989</b>     | <b>114,672</b> | <b>29,683</b>   |
|                       | <b>NON-RECURRENT EXPENDITURE</b>              |               |                   |                |                   |                 |                   |                |                 |
| 6,190                 | Loss on Disposal of Infrastructure            | 1             | 516               | 1,077          | 4,642             | 3,565           | 6,190             | 6,190          | 0               |
| 0                     | Disbursements                                 | 0             | 0                 | 0              | 0                 | 0               | 0                 | 0              | 0               |
| 0                     | Prior Year Adjustments                        | 244           | 0                 | 978            | 0                 | (978)           | 0                 | 0              | 0               |
| 0                     | Non Council Assets                            | 0             | 0                 | 0              | 0                 | 0               | 0                 | 0              | 0               |
| 0                     | Asset Demolition                              | 0             | 0                 | 0              | 0                 | 0               | 0                 | 0              | 0               |
| <b>6,190</b>          | <b>TOTAL NON-RECURRENT EXPENDITURE</b>        | <b>245</b>    | <b>516</b>        | <b>2,055</b>   | <b>4,642</b>      | <b>2,587</b>    | <b>6,190</b>      | <b>6,190</b>   | <b>0</b>        |
| <b>77,845</b>         | <b>NON-RECURRENT SURPLUS/(DEFICIT)</b>        | <b>4,673</b>  | <b>4,170</b>      | <b>73,803</b>  | <b>47,299</b>     | <b>26,504</b>   | <b>78,799</b>     | <b>108,482</b> | <b>29,683</b>   |
| <b>69,851</b>         | <b>NET SURPLUS/(DEFICIT)</b>                  | <b>9,224</b>  | <b>2,716</b>      | <b>80,048</b>  | <b>35,749</b>     | <b>44,299</b>   | <b>61,525</b>     | <b>101,507</b> | <b>39,982</b>   |

## STATEMENT OF FINANCIAL POSITION

### As at 31 March 2019

|                                      | <i>YTD Act<br/>Current Yr<br/>\$000s</i> | <i>YTD Act<br/>Previous Yr<br/>\$000s</i> | <i>Prior Year<br/>FY Actual<br/>\$000s</i> |
|--------------------------------------|--|---|--|
| <b>CURRENT ASSETS</b>                |  |   |  |
| Cash and Cash Equivalents            | 97,846                                   | 101,297                                   | 102,558                                    |
| Trade and Other Receivables          | 55,405                                   | 55,758                                    | 12,439                                     |
| Prepayments                          | 456                                      | 3,479                                     | 180  |
| Inventories                          | 1,212                                    | 1,184                                     | 1,101                                      |
| <b>TOTAL CURRENT ASSETS</b>          | <b>154,919</b>                           | <b>161,718</b>                            | <b>116,278</b>                             |
| <b>CURRENT LIABILITIES</b>           |  |   |  |
| Trade and Other Payables             | 23,249                                   | 26,146                                    | 29,609                                     |
| Unearned Income                      | 59,019                                   | 55,690                                    | 3,841                                      |
| Loans                                | 7,353                                    | 9,524                                     | 9,868                                      |
| Refundable Deposits                  | 5,950                                    | 3,776                                     | 4,929                                      |
| Employee Benefits                    | 32,834                                   | 31,947                                    | 30,967                                     |
| Landfill Provision                   | 447                                      | 8,933                                     | 447  |
| <b>TOTAL CURRENT LIABILITIES</b>     | <b>128,851</b>                           | <b>136,016</b>                            | <b>79,661</b>                              |
| <b>NET CURRENT ASSETS</b>            | <b>26,068</b>                            | <b>25,702</b>                             | <b>36,617</b>                              |
| <b>NON-CURRENT ASSETS</b>            |  |   |  |
| Land and Buildings                   | 945,157                                  | 872,739                                   | 948,137                                    |
| Plant and Equipment                  | 26,036                                   | 26,060                                    | 27,285                                     |
| Infrastructure                       | 1,300,231                                | 1,143,364                                 | 1,270,748                                  |
| Intangible Assets                    | 482                                      | 0   | 689  |
| Work In Progress                     | 141,641                                  | 111,505                                   | 83,171                                     |
| Investments                          | 10,694                                   | 10,665                                    | 10,694                                     |
| Receivables                          | 2,394                                    | 1,866                                     | 2,394                                      |
| <b>TOTAL NON-CURRENT ASSETS</b>      | <b>2,426,635</b>                         | <b>2,166,198</b>                          | <b>2,343,118</b>                           |
| <b>NON-CURRENT LIABILITIES</b>       |  |   |  |
| Developer Contributions Liability    | 172                                      | 37  | 37   |
| Loans                                | 34,384                                   | 29,356                                    | 38,810                                     |
| Employee Benefits                    | 304                                      | 481                                       | 2,886                                      |
| Landfill Provision                   | 12,970                                   | 0   | 13,177                                     |
| Carbon Tax Future Liability          | 0  | 0   | 0  |
| <b>TOTAL NON-CURRENT LIABILITIES</b> | <b>47,830</b>                            | <b>29,873</b>                             | <b>54,910</b>                              |
| <b>NET ASSETS</b>                    | <b>2,404,873</b>                         | <b>2,162,026</b>                          | <b>2,324,825</b>                           |
| <b>Represented by:</b>               |  |   |  |
| <b>RATEPAYER EQUITY</b>              |  |   |  |
| Surplus Year to Date                 | 80,048                                   | 43,745                                    | 65,040                                     |
| Accumulated Surplus                  | 1,281,953                                | 1,176,287                                 | 1,216,912                                  |
| Asset Revaluation Reserve            | 990,542                                  | 849,039                                   | 990,542                                    |
| Reserves                             | 52,330                                   | 92,955                                    | 52,330                                     |
| <b>TOTAL RATEPAYER EQUITY</b>        | <b>2,404,873</b>                         | <b>2,162,026</b>                          | <b>2,324,825</b>                           |

## STATEMENT OF CASH FLOWS

### As at 31 March 2019

|  | March<br>Actual<br>\$000s | March<br>Budget<br>\$000s |
|--|---------------------------|---------------------------|
| <b>Cash Flows from Operating Activities</b>                                      |                           |                           |
| <i>Payments</i>  |                           |                           |
| Employee Costs   | (108,196)                 | (115,434)                 |
| General Works / Utilities / Disbursements  | (123,559)                 | (116,755)                 |
| Administration / Professional Services   | (13,646)                  | (13,941)                  |
| Interest Expense   | (1,473)                   | (1,975)                   |
|  | <b>(246,874)</b>          | <b>(248,105)</b>          |
| <i>Receipts</i>  |                           |                           |
| General Rates  | 189,703                   | 187,744                   |
| Fire Services Levy   | 984                       | 0                         |
| Fees and Charges   | 63,276                    | 60,007                    |
| Investment Income  | 1,411                     | 1,451                     |
| GST Recoveries on Operating Transactions   | 14,387                    | 8,900                     |
| Government Grants  | 34,623                    | 32,300                    |
|  | <b>304,384</b>            | <b>290,402</b>            |
| <b>Net Cash Inflow/(Outflow) from Operating Activities before Capital Income</b> | <b>57,510</b>             | <b>42,297</b>             |
| <b>Cash Flows from Investing Activities</b>                                      |                           |                           |
| Payments for Land & Buildings, Plant & Equipment and Infrastructure Assets       | (80,753)                  | (90,707)                  |
| Payments for Investment in Associates  | 0                         | 0                         |
| Capital Income   | 15,515                    | 14,597                    |
| Proceeds from Sale of Land & Buildings   | 4,480                     | 4,700                     |
| Proceeds from Sale of Plant & Equipment  | 1,067                     | 1,788                     |
| Developer Cash Contribution  | 4,409                     | 3,420                     |
| <b>Net Cash Outflow from Investing Activities</b>                                | <b>(55,282)</b>           | <b>(66,203)</b>           |
| <b>Cash Flows from Financing Activities</b>                                      |                           |                           |
| Repayment of Borrowings  | (6,940)                   | (6,989)                   |
| Proceeds from New Loans  | 0                         | 42,047                    |
| <b>Net Cash Outflow from Financial Activities</b>                                | <b>(6,940)</b>            | <b>35,058</b>             |
| <b>Net Increase (Decrease) in Cash Held</b>                                      | <b>(4,712)</b>            | <b>11,153</b>             |
| Cash at the Beginning of the Financial Year                                      | 102,558                   | 102,558                   |
| <b>Cash at the End of Current Period</b>   | <b>97,846</b>             | <b>113,711</b>            |
| Loans  | 41,737                    | 83,736                    |
| <b>Closing Net Debt</b>  | <b>56,109</b>             | <b>29,975</b>             |

| <b>Cash and Investments</b>                   |                       |                           |                                 |                          |                        |                                |
|---|-----------------------|---------------------------|---------------------------------|--------------------------|------------------------|--------------------------------|
|   | <b>YTD Actual \$m</b> | <b>YTD Projection \$m</b> | <b>YTD Var Fav/ (Unfav) \$m</b> | <b>FY Projection \$m</b> | <b>FY Forecast \$m</b> | <b>FY Var Fav/ (Unfav) \$m</b> |
| Closing Net Cash Positive/(Neg)               | 97.85                 | 113.71                    | (15.86)                         | 92.22                    | N/A                    | N/A                            |
| <b>YTD Variance – (\$15.86m) unfavourable</b> |                       |                           |                                 |                          |                        |                                |

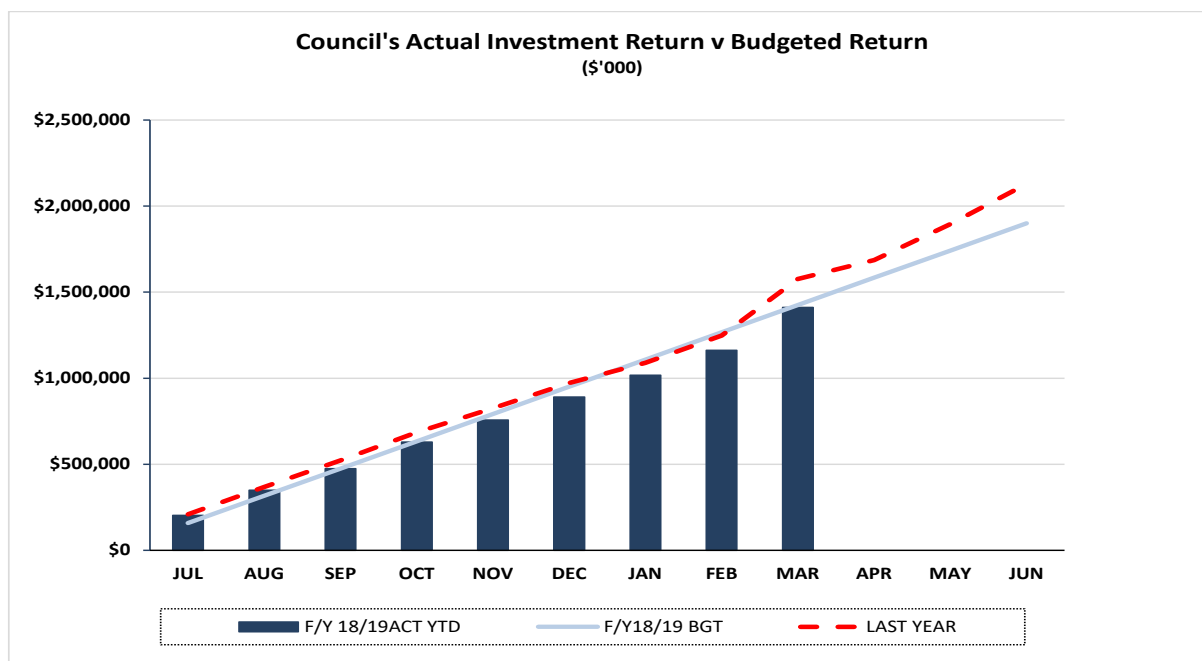
16. The month end cash and investments balance was \$97.85m. This was (\$15.86m) unfavourable, mainly due to new loans not being taken out, partly offset by capital spend behind schedule.

Council has future commitments for \$33.73m, which are fully cashed back:

|                     |                       |
|---------------------|-----------------------|
| Long Service Leave  | \$22.3m               |
| Statutory Reserves  | \$ 3.8m               |
| Refundable Deposits | \$ 5.9m               |
| Income in Advance   | \$ 1.2m               |
| Asset Development   | \$ 0.5m               |
| <b>Total</b>        | <b><u>\$33.7m</u></b> |

The Landfill Provision balance is currently \$13.0m.

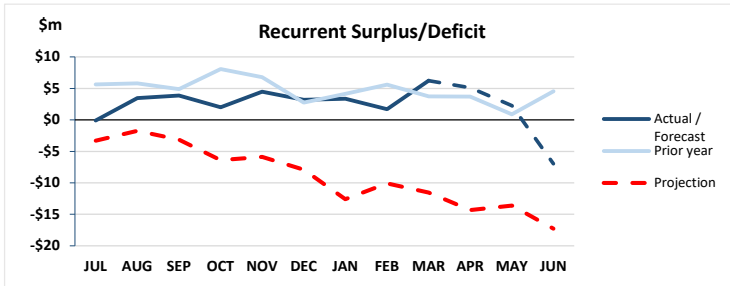
17. Working capital funds are invested in short term deposits and investment returns are as follows.



18. Investment returns are currently \$15k below budget and \$165k down compared to the same time last year.

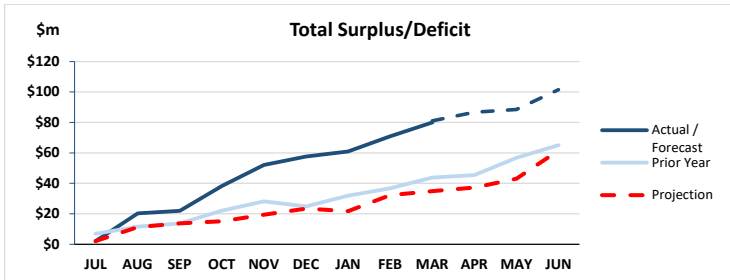
**Financial Performance Indicators**

**As at 31 March 2019**

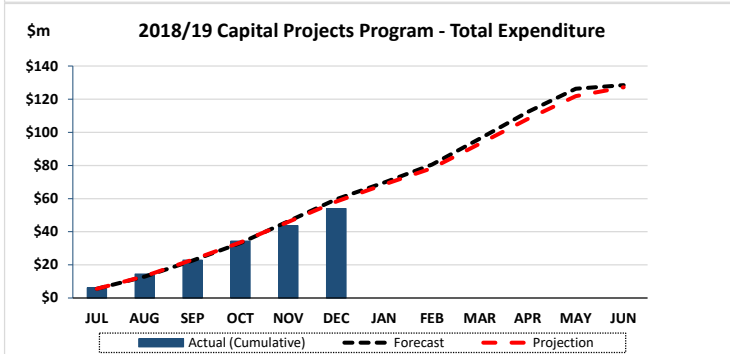


YTD surplus higher than projection due to favourable income and lower contractor costs.

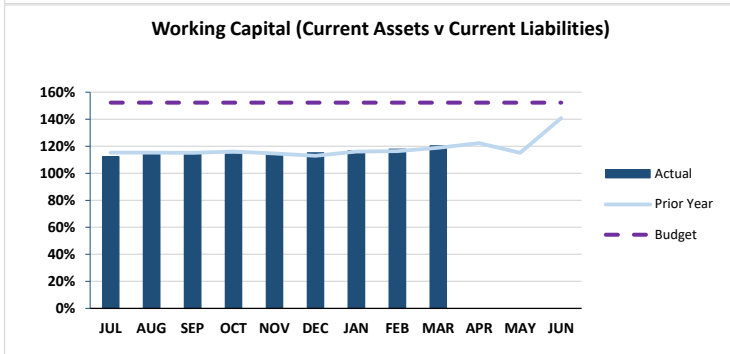
2018-19 projection lower than prior year actuals due to early receipt of \$10m from Grants Commission in June 2018, however relates to the 2018-19 year.



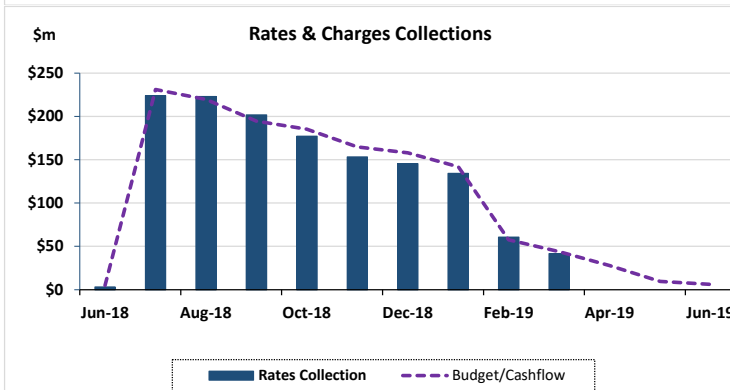
Favourable YTD mostly due to higher Subdivision Gifted Assets and the current favourable recurrent position.



Slight favourability v projection YTD mostly due to plan phasing/timing of projects.



Working Capital ratio tracking in line with prior year, however is lower than budget YTD, mostly due to higher unearned income \$59k YTD, which is expected to reduce at year end.



Tracking in line with budget

## **Attachment 2**

### ***Financial Implications***

1. Any financial implications are addressed within the body of the report.

### ***Community Engagement***

2. Project managers have been consulted and provided the latest project updates which have been factored into this report.

### ***Social Equity Considerations***

3. There are no social equity implications arising from the subject of this report.

### ***Policy/Legal/Statutory Implications***

4. The report is provided in accordance with requirements under the *Local Government Act 1989*.

### ***Alignment to Council Plan***

5. This report is aligned to the council plan strategic objective 'Organisational Leadership, Strategy and Governance.

### ***Conflict of Interest***

6. No Council officers or contractors who have provided advice in relation to this report have declared a conflict of interest regarding the matter under consideration.

### ***Risk Assessment***

7. There are no high or extreme risks arising from the subject of this report.

### ***Environmental Implications***

8. There are no environmental implications arising from the subject of this report.

#### **4. COUNCIL PLAN QUARTERLY REPORT – MARCH 2019**

**Source:** Governance, Strategy & Performance – Strategy, Engagement & Performance  
**Acting Director:** Rebecca Leonard  
**Portfolio:** Strategy and Communications

##### **Purpose**

1. To present the Council Plan Quarterly Report – March 2019 for consideration and endorsement by Council.

##### **Background**

2. Council adopted the 2018–22 Council Plan at the Council Meeting on 26 June 2018. The Council Plan identified the objective and priorities of Council. The *Council Plan Quarterly Report – March 2019* (Report) tracks the progress against Council Plan's 11 strategic priorities and the one year aims.

##### **Key Matters**

3. There are 84 key priorities and 56 aims. At the end of March 2019, the majority of these were on track year to date with:
  - 3.1 Six 'completed' to date with three completed in the March quarter:
    - *Implement the actions in the annual employee opinion survey; and*
    - *Convene a Junior Council, with input into decision making, to improve engagement with young people.*
  - 3.2 One 'not started':
    - *Advocating and planning for a second container port at Bay West.*
  - 3.3 Five 'needs improvement':
    - *Delivering the Better Bike Connections project;*
    - *Executing strategies for economic growth in the region's north - Identify opportunities for economic growth in the region's north;*
    - *Increasing free Wi Fi in public spaces and community facilities;*
    - *Developing digital tools and technologies to improve service delivery and our customer experience / Establishing sustainable financial and infrastructure management systems for our future; and*
    - *Using data and analytics to make better decisions.*
  - 3.4 One 'off track':
    - *Making our processes more effective and efficient.*

**Cr Murnane moved, Cr Nelson seconded -**

4. **That Council endorse the Council Plan Quarterly Report – March 2019, which will be made available to the community on the Council website.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. There are no financial implications arising from the subject of this report.

### ***Community Engagement***

2. The report has been prepared in consultation with officers from across the organisation. The report will be made available to the community online through Council's website ([www.geelongaustralia.com.au](http://www.geelongaustralia.com.au)), four times a year.

### ***Social Equity Considerations***

3. The report documents the work Council is undertaking in relation to improving access and inclusion for all.

### ***Policy/Legal/Statutory Implications***

4. The City's activities are guided by the *Council Plan 2018–22*, which was adopted in accordance with the *Local Government Act 1989*. The implementation of the council plan is monitored via the quarterly report.

### ***Alignment to Council Plan***

5. The report has been developed to meet our commitment to transparently report, including progress on council plan key priorities and aims.

### ***Conflict of Interest***

6. There have been no direct or indirect interests declared.

### ***Risk Assessment***

7. There are no identified risks arising from this report.

### ***Environmental Implications***

8. There are no identified environmental implications arising from this report.



THE CITY OF  
GREATER GEELONG

# COUNCIL PLAN 2018–22 QUARTERLY REPORT

---

MARCH 2019

## **SPARROVALE WETLANDS**

The City is working with a range of stakeholders to ensure the timely delivery of the Sparrovale Wetlands, an iconic, world class wetland environment which will provide significant environmental and community benefit.





## ABOUT THE PLAN

**Council Plan 2018–22 – Putting Our Community First** outlines how the City is working towards making Greater Geelong a clever and creative city-region. It guides how we allocate resources so we can deliver infrastructure, services and programs to the community in a sustainable way.

The 11 strategic priorities we are focusing on until 2022 are:

- **Improved health and safety of our community**
- **Informed social infrastructure and planning**
- **A more inclusive and diverse community**
- **Planned sustainable development**
- **Effective environmental management**
- **Vibrant arts and culture**
- **Integrated transport connections**
- **A thriving and sustainable economy**
- **Growing our tourism and events**
- **Innovative finances and technology**
- **Organisational leadership, strategy and governance**

This quarterly report has been developed to meet our commitment to transparent performance reporting, including progress updates on our key priorities and aims.

### Links to the vision

*Greater Geelong: A Clever and Creative Future* is the 30-year community vision for the region. *Council Plan 2018–22* outlines how we will work towards making Greater Geelong a clever and creative city-region.

### March status update

There are 84 key priorities and 56 aims. In March 2019, the majority of these were on track with:

- Six 'completed' year to date, two of these in the last quarter:
  - *Implement the actions in the annual employee opinion survey*
  - *Convene a Junior Council, with input into decision making, to improve engagement with young people.*
- One 'not started'
  - *Advocating and planning for a second container port at Bay West.*
- Five 'needs improvement'
  - *Delivering the Better Bike Connections project.*
  - *Executing strategies for economic growth in the region's north - Identify opportunities for economic growth in the region's north.*
  - *Increasing free Wi Fi in public spaces and community facilities.*
  - *Developing digital tools and technologies to improve service delivery and our customer experience / Establishing sustainable financial and infrastructure management systems for our future.*
  - *Using data and analytics to make better decisions.*
- One 'off track'
  - *Making our processes more effective and efficient.*

# IMPROVED HEALTH AND SAFETY OF OUR COMMUNITY

The health and safety of our community is vital. We will address family violence, homelessness, food shortages and public safety.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency       | Baseline | Target 2022 | YTD Mar 2019 | Progress comments         | Status |
|--|-----------------|----------|-------------|--------------|---------------------------|--------|
| Increase in the percentage of residents feeling safe where they live.                              | Every two years | 54%      | 57%         | -            | Reported every two years. | △      |
| Increase in the percentage of adults rating their health as very good, or excellent.               | Every two years | 59%      | 60%         | -            | Reported every two years. | △      |
| Increase in the percentage of adults who are sufficiently physically active.                       | Every two years | 41%      | 43%         | -            | Reported every two years. | △      |
| Increase in the percentage of children enrolled who participate in Maternal Child Health Services. | Annual          | 73.46%   | 75%         | -            | Reported annually.        | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims  | Progress comment  | Status |
|---|---|---|--------|
| Showing leadership in gender equity, diversity and family violence prevention.                |   | The draft <i>Ba-gurrk Gender Equity Framework and Action Plan</i> was endorsed on 12 February 2019. The City also co-hosted the 2018 Women in Community Life Awards which recognise and celebrate local women for their contributions in the community.                         | ■      |
| Supporting local organisations that address homelessness, family violence and food shortages. |   | We are assisting the <i>Towards Home Plus, Geelong</i> program, a joint initiative led by Neami National, which commenced in February 2019. This program has been essential in providing out-reach to a number of rough sleepers in central Geelong.                            | ■      |
| Develop a housing policy to provide a range of social and affordable housing options.         |   | The project has commenced with key stakeholder engagement and a community forum planned for May - June 2019. A final report and presentation will be provided to Council in October 2019.   | ■      |
| Improving safety in our community.  | <i>Consult with the community on safety issues that are impacting them.</i>     | Council are supporting local safety committees in Geelong and on the Bellarine to increase community safety. Over the coming months we will review the role and strategic plan of the Geelong Safety Committee.   | ■      |
| Providing safer public spaces.  | <i>Improve safety of, and user satisfaction with, community infrastructure.</i> | We are working together to implement a landscape plan to achieve Crime Prevention Through Environmental Design (CPTED) improvements for the Waurin Ponds Skate Park. A landscape concept plan has been developed and a construction works package is being prepared for tender. | ■      |
|   | <i>Improve public safety on the Geelong Waterfront and in Central Geelong.</i>  | The CCTV system is currently undergoing review and upgrade to provide improved capabilities with respect to the quality and analysis of imagery.  | ■      |

| Four year priorities<br>Council Plan 2018–22           | 2018–19<br>major aims  | Progress comment  | Status |
|--|--|---|--------|
| Working with stakeholders to prevent crime.            |  | We are continuing to be involved in the Central Geelong Mall Subcommittee, a collaborative approach to addressing some of the perceived issues in and around the Little Malop Street Mall. The subcommittee, overseen by the G21 Regional Justice Reference Group, is supported by the State Government, the City, Victoria Police and other community and youth groups.  | ■      |
| Encouraging responsible pet ownership.                 |  | We completed an audit and implementation plan for signage requirements. We are undertaking a review of bin and waste bag locations, particularly along trails. Council recently adopted a dog park strategy, including three-priority areas for construction within the East, Central and North of the municipality.  | ■      |
| Promoting healthy eating and supporting active living. |  | The Municipal Public Health and Wellbeing Plan 2018–2021 was endorsed by Council in October 2018. Activities within the plan currently underway include: collaboration on an effective Choose Water campaign, reduction of sugary drinks in Council's managed sport and recreation facilities, hosting of a Mental Health awareness event and development of a discussion paper outlining the City's role in mental health and wellbeing. | ■      |
|  | <i>Consult with the community to create more health and fitness options.</i> | We have provided free healthy eating seminars for members across all of our leisure centres. A member survey was conducted in March to gather feedback on satisfaction, communication methods and program ideas. Virtual fitness classes have now commenced at Leisurelink and are scheduled to commence at our other centres over the next four months.  | ■      |
| Creating healthy environments in children's settings.  |  | We promote healthy eating in all children settings and provide support and encouragement to families. When developing menus we follow the Australian Dietary Guidelines to ensure a range of healthy food options are provided.   | ■      |
| Working towards having the safest roads in Victoria.   |  | Central Geelong pedestrian improvement works, which include upgrades to pedestrian crossing points and intersections, have been completed in Myers Street, Bellerine Street and at Eastern Beach.<br><br>The <i>Geelong Road Safety Strategy</i> review is underway, with the final document and community engagement due in 2019.  | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



PEOPLE FEEL SAFE  
WHEREVER THEY ARE



AN INCLUSIVE, DIVERSE,  
HEALTHY AND SOCIALLY  
CONNECTED COMMUNITY

# INFORMED SOCIAL INFRASTRUCTURE AND PLANNING

We will strive for social equity in the infrastructure and services we deliver for our community.

■ On track    
 ◆ Needs improvement    
 ⬢ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency | Baseline               | Target 2022 | YTD Mar 2019                        | Progress comments  | Status |
|--|-----------|------------------------|-------------|-------------------------------------|--|--------|
| No net loss of public open space by suburb.                            | Annual    | 2,147.6 ha (530 sites) | Maintain    | 2,177.9 hectares (549 sites) (2018) | An increase of 19 sites and 30.3 hectares on the baseline result of 2017 with no net loss in any suburb. | ■      |
| Per cent of plans for key community infrastructure projects completed. | Annual    | -                      | 100%        | -                                   | 37 key community infrastructure projects have been identified for delivery in 2018–19.                   | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims   | Progress comment  | Status |
|---|--|---|--------|
| Providing more quality spaces that support active lifestyles.                           |  | Construction of two new sporting ovals, netball courts and a community pavilion at Armstrong Creek East Precinct is now complete. Construction of a new softball and baseball pavilion at Stead Park is also completed. In March, Council endorsed the design of a community shed as part of the Armstrong Creek West Sports Reserve, and the development of a new all accessible play space at Rippleside Park.  | ■      |
| Supporting the growth of localised and regional sporting facilities.                    | <i>Provide new sports and leisure facilities, and upgrade existing ones.</i>           | <p>New or upgraded facilities are being delivered at over twenty sport and recreation reserves in the municipality. Some of these include:</p> <ul style="list-style-type: none"> <li>• court update at Ocean Grove Tennis Club</li> <li>• West Oval Pavilion and facility redevelopment.</li> <li>• St Mary's pavilion redevelopment</li> <li>• Herne Hill new netball shelter</li> <li>• change room upgrades at Grovedale, South Barwon and East Geelong Recreation Reserves.</li> </ul> <p>Masterplans have also been completed for Herne Hill Reserve and West Oval, with further masterplans underway for Lara Recreation Reserve, Drysdale Sporting Precinct and Grovedale Recreation Reserve.</p> | ■      |
| Delivering accessible and attractive community infrastructure, based on community need. | <i>Complete planning and design of the Northern ARC Health and Wellbeing Hub.</i>      | The schematic design phase is now complete. Detailed design has commenced and is due to be completed in August / September 2019. We will continue to actively lobby both state and federal government for funding.  | ■      |
|   | <i>Complete planning to upgrade existing children's centres, and provide new ones.</i> | <p>We have opened two new Children and Family Centres in Armstrong Creek East and Highton respectively. Planning has commenced for Armstrong Creek West Child and Family Centre.</p> <p>The Drysdale and Purnell Road (Corio) Integrated Children's Centres are now under construction and on track to be opened in 2020.</p>   | ■      |
|   | <i>Acquire land for new community infrastructure.</i>                                  | We completed acquisitions in the Armstrong Creek area for drainage infrastructure. We are about to finalise a land exchange in Indented Heads. This land will be enhanced to create benefit for the community.  | ■      |
|   | <i>Upgrade community facilities and make them safer.</i>                               | <p>Five replacement toilet blocks providing accessibility have been completed including:</p> <ul style="list-style-type: none"> <li>• Windmill Reserve, Newtown</li> <li>• Queens Park, Newtown</li> <li>• Kingston Park, Ocean Grove</li> <li>• Collendina Foreshore, Ocean Grove</li> <li>• Harvey Park, St Leonards.</li> </ul> <p>The last toilet block, Gateway Sanctuary in Leopold, will be completed by the end of June 2019.</p>   | ■      |

| Four year priorities<br>Council Plan 2018–22                                  | 2018–19<br>major aims                                | Progress comment   | Status |
|---|--|--|--------|
|   | <i>Upgrade streets, roads, footpaths and drains.</i> | <p>The 2018–19 renewal programs for the upgrade of roads, footpath, kerb and channel, drainage and bridges is underway. Some of the programs the City is currently undertaking include:</p> <ul style="list-style-type: none"> <li>• Completion of missing links of kerb and channel, and footpath along Barwarre Road, Marshall</li> <li>• Ongoing design development of major drainage projects including flood mitigation in Epworth Street, Ocean Grove and main drainage outfall Coriyule Road, Curlewis</li> <li>• Construction of kerb and channel, and traffic in High Street/Watson Road, Belmont.</li> </ul> | ■      |
| Advocating and planning for a range of social and affordable housing options. |  | We have planning policies to encourage housing diversity in established areas and key locations in greenfield areas are in place. The development of a social housing policy is currently underway.  | ■      |
| Maintaining our public open space.  | <i>Provide more accessible public urban space.</i>   | <p>The Central Geelong – Public Open Space Network report has been noted by the Council. This report will inform the review of the Greater Geelong Open Space Strategy, which once adopted by Council, will set the strategic direction and guide decision making, prioritising and investing in the current and future open space network.</p> <p>The Open Space Study is being finalised with a view of presenting to Council in the coming months, alongside the Social Infrastructure Planning work currently underway.</p>  | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



AN INCLUSIVE, DIVERSE,  
HEALTHY AND SOCIALLY  
CONNECTED COMMUNITY



PEOPLE FEEL SAFE  
WHEREVER THEY ARE



SUSTAINABLE DEVELOPMENT  
THAT SUPPORTS POPULATION  
GROWTH AND PROTECTS THE  
NATURAL ENVIRONMENT








# A MORE INCLUSIVE AND DIVERSE COMMUNITY

We want to recognise all members of the Geelong community and not leave anyone behind.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency        | Baseline | Target 2022 | YTD Mar 2019 | Progress comments   | Status |
|--|------------------|----------|-------------|--------------|---|--------|
| Increase in the percentage of adults who definitely feel multiculturalism makes life better.                     | Every four years | 57.4%    | 60%         | -            | Reported every four years.  | △      |
| Increase in the percentage of adults attending a local community event.  | Every four years | 71.2%    | 75%         | -            | Reported every four years.  | △      |
| Increase in the percentage of adults feel that they can get help from family, friends or neighbours when needed. | Every four years | 73.5%    | 80%         | -            | Reported every four years.  | △      |
| More community facilities with gender-neutral and accessible toilets, or change areas.                           | TBD              | -        | Increase    | -            | 20 gender neutral toilets have been completed at the Armstrong Creek Sports Pavilion. | ■      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims  | Progress comment  | Status |
|---|---|---|--------|
| Advocating for, and helping to achieve, the priorities set by local Aboriginal people.      | <i>Renew the Karreenga Aboriginal Action Plan</i>                 | We commenced community engagement to inform the development of Council's first <i>Reconciliation Action Plan</i> , which will replace the <i>Karreenga Aboriginal Action Plan</i> . We plan to complete this action plan before the end of 2019.  | ■      |
| Improving our engagement with our culturally diverse population.                            | <i>Renew the Multicultural Action Plan</i>                        | The <i>Multicultural Action Plan 2018–22</i> was launched in February 2019 following its endorsement by Council in October 2018.  | ✓      |
| Supporting activities that improve social connections in our community.                     | <i>Create a framework to support social and charitable groups</i> | <p>The City is providing a second round of grants for Community Investment and Support Fund - Healthy and Connected Communities Grants. Applications closed in February 2019 and are currently being considered.</p> <p>We facilitated and delivered a number of projects to foster social connections, including:</p> <ul style="list-style-type: none"> <li>Road Safety Project in Apollo Place Whittington</li> <li>Story Cube Project with Nelson Park</li> <li>School Bike Education Challenge with Nth Geelong Secondary College</li> <li>capacity-building with Neighbourhood Houses.</li> </ul> <p>We also continued our youth interactions aimed at improving social and community connections through groups, drop in programs and events, engaging with almost 9,000 young people since January.</p> | ■      |
| Promoting gender equity and diversity in our sporting and leisure facilities, and programs. |   | New gender neutral change rooms have been constructed at Winter Reserve, Belmont and Lara United Football Club. New facilities are planned as part of the West Oval Pavilion redevelopment, South Barwon and Bell Park recreation reserves.   | ■      |

| Four year priorities<br>Council Plan 2018–22  | 2018–19<br>major aims   | Progress comment  | Status  |
|---|---|---|---|
| Facilitating employment programs for the communities that need it most, including young people. |   | The Whittington Works demand-led employment project funded by Jobs Victoria, continues to support job seeking residents in Whittington in partnership with Bethany Community Support.<br>The Skilling the Bay funded Whittington Works - Opportunity East (Education to Employment Program) have delivered the Women of Whittington Workwise Women's program, in partnership with The Gordon Skills and Job Centre and referred jobseekers to an Industry Skills Set Skills Uplift Traffic Management/ Entry Level Construction training program with Multiskills.<br>The City is also supporting a series of 'Exploring Your Horizons' small business planning workshops to foster local small business/social enterprise initiatives. |    |
|   |   | We facilitated 220 skill groups and educational programs across the municipality, engaging with over 1,500 young people since January.  |    |
| Improving access to facilities and programs for people of all abilities.                        | <i>Provide a grants scheme to fund community groups and initiatives that promote inclusion and accessibility.</i> | Applications for Round 2 of the Community Investment Support Fund - Healthy and Connected Communities Grants closed in February with applications now being considered.   |    |
|   |   | Actions from the recently endorsed <i>Access and Inclusion Plan</i> are underway with the delivery of a Marveloo, providing the City with a portable self-contained adult change facility for use at events. Marketing and implementation is scheduled to occur by June 2019.   |    |
| Recognising our returned service men and women.   |   | We are supporting and facilitating a range of projects including: <ul style="list-style-type: none"> <li>installing Bluestone Pavers with Victoria Cross recipient names and relocating the Spirit of ANZAC statue within Johnston Park</li> <li>developing Armistice Day Stories of Peace for Anzac day projections on City Hall in 2019</li> <li>installing Honour Walls at the Ocean Grove War Memorial for Anzac Day</li> <li>developing a Connecting Memory Anzac Digital Story Trail for Armstrong Creek</li> <li>an Armistice Living Tribute for Johnstone Park</li> <li>adding to the Veterans of the Boer War collection through a partnership between the Lara RSL with the National Wool Museum.</li> </ul>                  |  |
| Further developing programs that support older people and young people in our community.        | <i>Renew the Municipal Early Years Plan</i>   | Council endorsed the <i>Municipal Early Years Plan 2018–22</i> in November 2018. As well as being a plan of action to help us improve the health and wellbeing of the region's children (aged 0-8) and their families, it is also intended as a guide for early years providers and services within the municipality.   | ✓   |
|   |   | We are continuing to develop a positive and active ageing discussion paper to use during the consultation phase of our positive ageing strategy planned for April/May.  |  |
| Advocating for inclusive, multicultural activities and respect for cultural diversity.          |   | Council has adopted the Multicultural Action Plan 2018-2022. The focus of the plan reinforces the work undertaken in this area including the development of a 2018-19 calendar that identifies publically accessible, culturally diverse and faith events. The City is providing employee training to support awareness, respect and responsive service delivery to our culturally diverse communities.   |  |

## LINKS TO THE CLEVER CREATIVE VISION



AN INCLUSIVE, DIVERSE,  
HEALTHY AND SOCIALLY  
CONNECTED COMMUNITY



PEOPLE FEEL SAFE  
WHEREVER THEY ARE

# PLANNED SUSTAINABLE DEVELOPMENT

We will use sustainable principles to guide development of growth areas and help protect our townships.

■ On track    
 ◆ Needs improvement    
 ⬮ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency | Baseline          | Target 2022                | YTD Mar 2019 | Progress comments  | Status |
|--|-----------|-------------------|----------------------------|--------------|--|--------|
| More protected natural habitat that we manage.   | Annual    | 898.712 hectares* | Increase                   | -            | *The next update on the December 2018 baseline result will be available late 2019/early 2020.  | △      |
| 15 years of residential land supply planned.   | Annual    | 14+ years         | Maintain                   | -            | Reported annually.   | △      |
| Increase in the percentage of new housing construction conducted within existing urban areas.      | Annual    | 37.8%             | 40%                        | 27.0% (2018) | There has been a significant increase in the total annual dwelling production. Greenfield development is most able to respond to spikes in demand for new dwellings. The next update on this result will be available late 2019/early 2020.  | ⬮      |
| All new large, City-owned buildings rated 5-star 'Green Star'.                                     | Annual    | -                 | 100%                       | -            | Reported annually.   | △      |
| All new small, City-owned buildings with built environment sustainability scorecard or equivalent. | Annual    | -                 | 100%                       | -            | Reported annually.   | △      |
| Mandatory sustainable design assessment of all new developments.                                   | n/a       | n/a               | Planning controls in place | -            | The City has completed a public exhibition of a planning scheme amendment to include environmentally sustainable design local policy in the Greater Geelong Planning Scheme. The policy will require multi-dwelling developments to include an Environmentally Sustainable Development assessment as part of the planning permit process. It is expected the policy will be adopted and operating by mid-2019. | ■      |

| Four year priorities Council Plan 2018–22  | 2018–19 major aims   | Progress comment   | Status |
|--|--|--|--------|
| Making sure housing supply, diversity and affordability can meet the needs of our growing community. | <i>Complete the Settlement Strategy, to guide growth, boundaries and development in townships and urban areas.</i> | Planning scheme amendment to implement the Settlement Strategy and the Northern and Western Geelong Framework Plan is underway.  | ■      |
| Facilitating opportunities for infill residential development.                                       |  | The <i>West Fyans Structure Plan, Pakington Street Urban Design Framework</i> and <i>South Geelong Urban Design Framework</i> are underway. Work underway includes community consultation and identification of types and scale of new infill development for these areas. | ■      |
| Continuing to develop urban growth areas across the region.  |  | The framework plan for Northern and Western Geelong Growth Areas was adopted by Council on 26 March 2019. More than 30 active estates in Greater Geelong are providing a diversity of lot types and housing products.  | ■      |

| Four year priorities<br>Council Plan 2018–22  | 2018–19<br>major aims  | Progress comment   | Status |
|---|--|--|--------|
| Managing the impact of development on the unique character of our townships.          |  | Infrastructure construction and planning is underway in our growth areas to meet the needs of new residents.   |        |
|   |  | Work with Department of Environment, Land, Water and Planning is underway to investigate designation of the Bellarine Peninsula as a distinctive landscape area. Design controls to guide new development in Barwon Heads being implemented through the Barwon Heads Structure Plan. The final amendment has been adopted by Council and submitted to the Minister of Planning.  | ■      |
| Improving the environmental performance of new developments, using planning controls. |  | We have completed the public exhibition period for a planning scheme amendment designed to include environmentally sustainable design local policy in the Greater Geelong Planning Scheme. The amendment is scheduled to be considered by Council in April 2019.   | ■      |
| Delivering biodiversity conservation programs.  |  | Council has adopted a first-of-its-kind plan aimed at protecting the hooded plover, an iconic and highly threatened bird species that lives and breeds on local beaches. The program is underway, in partnership with BirdLife Australia and community volunteers.<br><br>In February 2019 we partnered with the Geelong Field Naturalists Club to present the inaugural Geelong Nature Forum. The one-day forum featured short talks by local biodiversity experts, informing residents about the wildlife wonders on their doorstep, and the potential ways for them to help look after our natural environment. | ■      |
| Preserving nature reserves, rural and coastal environments.                           | <i>Manage the delivery of nature reserves in new developments</i>                                      | The City is supporting local community groups, including environmental education, and via the engagement of specialist environmental contractors, to assist with weed control works.   | ■      |
|   | <i>Establish Sparrovale Wetlands, to enhance the area and its biodiversity.</i>                        | The City is working with a range of stakeholders to ensure the timely delivery of the Sparrovale Wetlands system. The Sparrovale Master Plan will shape the design and development of a new parkland for the Geelong community. Consultation on the master plan will occur later this year   | ■      |
|   | <i>Continue a coordinated approach to drainage and water sensitive urban design.</i>                   | Council approved the Barwon Region Strategic Directions Statement for Integrated Water Management in October 2018, and it was signed off by the minister in December 2018. We also received a Victorian Planning Authority grant in December 2018 to prepare a stormwater services strategy.   | ■      |
|   | <i>Review of existing land for community facilities, with new land acquired where needed.</i>          | We reached an agreement with VicRoads to purchase surplus land. This will be used for social infrastructure that can support the new and developing Fyansford community. We are currently awaiting contract of sale documentation from VicRoads.   | ■      |
|   | <i>Introduce a rural and peri-urban advisory body to build relationships and foster best practice.</i> | The Peri Urban Advisory Committee is currently working on a number of environmental initiatives. The committee has identified four priority areas for further work including: biosecurity; livestock exchange; information exchange and truck-wash facilities.   | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



SUSTAINABLE DEVELOPMENT  
THAT SUPPORTS POPULATION  
GROWTH AND PROTECTS THE  
NATURAL ENVIRONMENT

# EFFECTIVE ENVIRONMENTAL MANAGEMENT

We will show leadership to address waste, climate change and environmental challenges.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency          | Baseline   | Target 2022      | YTD Mar 2019 | Progress comments  | Status |
|--|--------------------|--|------------------|--------------|--|--------|
| Increase in percentage of garbage, recyclables and green organics collected from kerbside bins diverted from landfill. | Every three months | 56.32%   | 60%              | 53.48%       | Green waste has been reduced due to the extended dry period but has a peak in spring. Recycling trend is increasing due to the record dry summer and autumn period on the Peninsula. Overall recycling weight per capita is slowly reducing due to a reduction in newspaper circulation and conversion of glass containers to plastic containers. An options paper is going to Council in the first half of the 2019-20 financial year for review of possible long-term solutions. | ◆      |
| Reduction in emissions from street lights, buildings and vehicle fleet use.  | Annual             | 23,135   | 50% reduction    | -            | Reported annually. Target and baseline are from 2014-15 levels as per the City's Zero Carbon Emissions Strategy.   | △      |
| Increased use of sustainable material in our asset construction and renewal.   | Annual             | 8,000 tonnes of asphalt recycled in-house annually<br>3,000 tonnes of concrete to recycling annually | Increase         | -            | Reported annually.   | △      |
| Increased suburban tree canopy.  | Every two years    | 14%  | 16%              | -            | Reported every two years.  | △      |
| Increased number of street trees planted per annum.  | Every three months |  | >1,850 per annum | 902          | Street tree planting mainly occurs during late Autumn and Winter as this is the best time of year for planting.  | ■      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims   | Progress comment   | Status |
|---|--|--|--------|
| Reduce our carbon footprint through the use of solar initiatives and other renewable energy options.          | <i>Continue to improve environmental management services.</i>                  | We have undertaken the following work at City owned facilities: <ul style="list-style-type: none"> <li>• rooftop solar systems installed, with 21 systems to be in operation by the end of 2019</li> <li>• upgraded inefficient lighting across multiple sites</li> <li>• heating, ventilation and cooling upgrades and building management systems installed to more efficiently heat and cool our facilities.</li> </ul> | ■      |
|   | <i>Continue to embed One Planet Living principles across the organisation.</i> | We are training our employees in One Planet Living, including presentations at employee induction sessions.  | ■      |
| Educating and assisting our community to act on climate change, by reducing waste, emissions and water usage. | <i>Identify 'waste-to-energy' options for our region.</i>                      | We will continue to meet with other local governments, energy providers, waste-to-energy companies and other stakeholders to explore options for alternative waste treatment.  | ■      |

| Four year priorities<br>Council Plan 2018–22  | 2018–19<br>major aims  | Progress comment  | Status |
|---|--|---|--------|
|   | <i>Trial a hard waste collection service.</i>  | We have started trialling a book-in hard waste collection service which aims to collect items that are not accepted or do not fit into the three-bin residential kerbside collection. The City has already received nearly 4,500 bookings for the service since it opened on 1 March 2019.  | ■      |
|   | <i>Renew the Environment Management Strategy.</i>  | We completed our internal and community engagement workshops to provide input into the <i>Environment Management Strategy</i> . We plan to have the draft document available for public consultation by mid-2019.   | ■      |
|   | <i>Continue to invest in the community Environment and Sustainability grants program.</i>              | We allocated all \$50,000 of our 2018–19 Environment and Sustainability Grants Program funds in December 2018.  | ✓      |
|   | <i>Investigate options to achieve zero waste to landfill and support the community to do likewise.</i> | We are exploring options to achieve zero landfill waste through discussions with other local governments, businesses and state government agencies. Findings will be presented in our Waste Strategy, which is currently under development.   | ■      |
| Using sustainable materials to construct and renew roads, footpaths and street furniture.     |  | We are using recycled crushed concrete in sub-base construction for footpaths.<br>We are also investigating the possibility of using recycled plastic in asphalt pavements by speaking to suppliers and other local Governments.  | ■      |
| Progressively changing standard street lights to LED lights, to help reduce carbon emissions. |  | We have developed a business plan, including financial modelling, for the replacement of our existing 20,000+ streetlights with LED lighting, which is due to be considered in May 2019.  | ■      |
| Commencing Drysdale landfill rehabilitation.  |  | We have commenced stakeholder consultation for the development of the Drysdale Landfill Landscape Plan, including meeting with the Drysdale Landfill Community Consultation Group. We have begun to prepare options from this engagement, along with forming a project reference group with key stakeholders. This group, which will meet before the end of the financial year to consider these options. | ■      |
| Constructing a green organics facility.   |  | The City's Garden Organics Processing Facility in Anakie has received its first delivery of residential green waste. The composting facility is expected to process an estimated 35,000 tonnes of green organics from the Greater Geelong region.   | ✓      |
| Planting more trees to green and cool our urban areas.  |  | Between July and December 2018, we planted 1,132 new advanced trees in streets and parks as part of the <i>Urban Forest Strategy</i> and we are currently using additional resources over summer to water street and park trees. Preparation and planning for the 2019 planting season has begun with planting to commence in June 2019.  | ■      |
| Reducing single-use plastic across the region.  |  | We developed and are in the process of implementing a Plastic Wise program to reduce single-use plastics at all our events, functions, activities and offices. Council passed a resolution on the Save Our Recycling Plan and is lobbying the state government to be able to implement programs.  | ■      |
| Managing pest plants and animals more effectively.  |  | We reached an agreement with the Department of Environment, Land, Water and Planning on the process for our rabbit-baiting program. This will commence at six reserves in May 2019.   | ■      |
|   | <i>Protect and rehabilitate our beaches, waterways and conservation reserves.</i>                      | We are working collaboratively with State government, other local governments, conservation groups and landowners on the Volcanic Plains Protection Program. This successful initiative provides landholders on the volcanic plains with funding and support to protect and rehabilitate private land.  | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



DEVELOPMENT AND  
IMPLEMENTATION OF  
SUSTAINABLE SOLUTIONS



SUSTAINABLE DEVELOPMENT  
THAT SUPPORTS POPULATION  
GROWTH AND PROTECTS THE  
NATURAL ENVIRONMENT









# VIBRANT ARTS AND CULTURE

We treasure Geelong's culture and heritage and will help our creative community to grow.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success   | Frequency        | Baseline   | Target 2022 | YTD Mar 2019 | Progress comments                | Status |
|---|------------------|--|-------------|--------------|----------------------------------|--------|
| Increased number of objects actively cared for within our arts and heritage collections.  | Annual           | 17,325   | Increase    | -            | Reported annually.               | △      |
| Increased access to cultural collections through on-line engagement.  | Annual           | 49,093   | Increase    | -            | Reported annually.               | △      |
| Increase in the percentage of active library members in the municipality.   | Annual           | 19.28%   | 20%         | -            | Reported annually.               | △      |
| Increased employment in creative occupations.   | Every five years | 4.75%  | Increase    | -            | Data available from 2021 Census. | △      |
| Maintained visitation to our key cultural facilities: National Wool Museum (NWM), Potato Shed, Geelong Gallery, Courthouse Youth Arts, Geelong Library & Heritage Centre. | Annual           | NWM - 851,879<br>Potato Shed 108,444<br>Geelong Gallery 116,940<br>Courthouse Youth Arts 13,940<br>Geelong Library & Heritage Centre 456,934 | Maintain    | -            | Reported annually.               | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims | Progress comment   | Status |
|---|--------------------|--|--------|
| Incorporating arts and cultural initiatives into infrastructure development, to enhance our sense of place. |                    | Our implementation of the <i>Public Art Strategy</i> continues, with a range of projects including: <ul style="list-style-type: none"> <li>the Sunken Gallery</li> <li>contributing to the heritage interpretation of the Sale Yards.</li> <li>partnering with the Traffic Accident Commission (TAC) for a public art memorial for road trauma at Limeburners Point.</li> </ul>  | ■      |
| Recognising and sharing our heritage through storytelling.  |                    | We have been working on the following storytelling projects: <ul style="list-style-type: none"> <li>five stories completed for the Connecting Memory project</li> <li>an interpretative trail commemorating our ANZAC heritage in Armstrong Creek</li> <li>Bronze Stories, a Central Geelong installation</li> <li>exhibitions and public programmes at the National Wool Museum (NWM)</li> <li>NWM exhibitions and public programmes highlighting the region's heritage.</li> </ul> | ■      |
| Recognising and celebrating Geelong's Aboriginal culture and history.                                       |                    | We are currently planning for the 2019 Reconciliation Projection Program. Other projects we have been working on include the Armstrong Creek Connecting Memory project, featuring stories of the First People and working with Wadawarrung to preserve a scar tree, with the aim of placing it at the NWM.   | ■      |

| Four year priorities<br>Council Plan 2018–22  | 2018–19<br>major aims   | Progress comment   | Status  |
|---|---|--|---|
| Working with galleries and museums to improve our public art and heritage offering.   | <i>Develop a cultural strategy that advances our museums and galleries.</i>         | We have done a lot of research to inform the upcoming cultural strategy and heritage asset strategic plan, and the framework for engagement has commenced. The <i>Public Art Strategy</i> , due for completion in 2020, will also be refreshed as part of this process.  |    |
|   | <i>Attract more national art exhibitions to the region.</i>                         | Geelong is presenting major national and international exhibitions at both the Geelong Gallery and the National Wool Museum for 2018-19 including: Sydney Nolan's Ned Kelly series (the Geelong Gallery) and London's Natural History Museum Wildlife Photographer Awards (NWM).   |    |
| Attracting new, and supporting existing, creative industries.   |   | We continue to deliver Arts & Culture information and promotions through ArtsAtlas Geelong and the Arts Bulletin. Renew Geelong, a project we fund in partnership with Creative Victoria, has been successfully activating Central Geelong's empty shops with creative and social enterprises. The Creative Geelong project, also cofounded with Creative Victoria, has been ongoing, staging a number of workshops and social enterprises.  |    |
| Delivering UNESCO City of Design creative outcomes, including: National Wool Museum Master Plan; Geelong Gallery redevelopment; Mountain to Mouth; Geelong After Dark; cultural trails. |   | We are developing a range of exciting creative partnerships for Geelong After Dark and Pivot Summit including a digital project partnership between Deakin University, Ars Electronica Australia and the City, and a large scale aerial installation with ACTNatimuk. Geelong also partnered with Melbourne Design Week for the first time in 2019, hosting over 20 events including workshops, talks, tours and exhibitions.<br><br>The NWM saw over 20,000 visitors for the UNESCO City of Design linked exhibition <i>Masters: Art of the Precious Metal Object</i> .<br><br><i>The Little L Project</i> of the National Wool Museum, in partnership with Deakin University, received Highly Commendable Collaboration or Partnership of the Year Award at the MAV Technology Awards for Excellence 2019. |    |
| Working with the Geelong Regional Library Corporation to deliver efficient and effective services and programs.   |   | As part of Melbourne Design Week in March 2019, we collaborated with the Deakin University School of Architecture and Built Environment, the Geelong Gallery, and Geelong Regional Libraries, to deliver Vital Signs: Smart City, Living City. This was a three-part exhibition with representations of alternative, possible, and plausible design futures for Geelong.   |  |
|   | <i>Support music and performing arts programs.</i>                                  | Guided by the Central Geelong Live Music Action Plan we are supporting our local music sector by increasing the live music presence at Geelong After Dark 2019, and providing advisory support for local music initiatives.<br><br>The next iteration of Connecting Song, a three-part mentorship of experienced songwriters with young emerging musicians, is underway, with mentors and mentees working together in preparation for Geelong After Dark.  |  |
|   | <i>Commence Osborne House remediation.</i>  | We are undertaking a precinct masterplan, which incorporates the land within the boundaries of Swinburne Street, Mackey Street, Princes Highway and the foreshore, including St Helens. This will include options for future use of Osborne House. The masterplan report will be presented to Council by the end of June for approval and adoption.  |  |
|   | <i>Put heritage and conservation plans in place for significant infrastructure.</i> | The <i>Municipal Heritage Strategy</i> was adopted in August 2017. Conversation management plans are a critical tool for the ongoing protection of our heritage buildings and they are being prepared and implemented for many City owned sites.   |  |

## LINKS TO THE CLEVER CREATIVE VISION



CREATIVITY DRIVES CULTURE



A DESTINATION THAT  
ATTRACTS LOCAL AND  
INTERNATIONAL VISITORS





# INTEGRATED TRANSPORT CONNECTIONS

Our focus will be on improving our public and active transport, and better connecting our networks.

■ On track    
 ◆ Needs improvement    
 ◼ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency | Baseline                                | Target 2022 | YTD Mar 2019 | Progress comments  | Status |
|--|-----------|---|-------------|--------------|--------------------|--------|
| Increased kilometres of bicycle and walking paths.               | Annual    | 206 km bike paths<br>1,674 km footpaths | Increase    | -            | Reported annually. | △      |
| Increased community satisfaction rating with sealed local roads. | Annual    | 49                                      | 60          | -            | Reported annually. | △      |
| Renewal gap for road management reduced.                         | Annual    | \$4.5 M                                 | Reduce      | -            | Reported annually. | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims  | Progress comment  | Status      |
|---|---|---|-------------|
| Supporting projects in the G21 Region Road Transport Plan.                            | <i>Establish a traffic management plan for the northern growth corridor (including Lara).</i> | We have collected data and completed an engagement survey for the Lara Traffic Study. We will now prepare an action plan and confirm it with the working group, VicRoads and the Transport Group prior to rollout. The Northern and Western Geelong Growth Area (NWAGGA) will have a separate transport plan for movement and place.  | ■           |
|   | <i>Work with VicRoads to deliver truck restrictions in Central Geelong.</i>                   | A <i>Central Geelong Freight Movement Plan</i> has been prepared by Transport for Victoria, with recommendations pending funding and finalisation of the <i>Transport Network Operating Plan</i> which was presented to Council in March.   | ■           |
| Working with VicRoads to deliver the Network Operating Plan, to improve bus services. |   | Transport for Victoria has held three workshops with industry stakeholders and prepared a draft <i>Network Plans for Transport and Bus Access in Central Geelong</i> . The draft plan is now pending Council approval prior to going out for community consultation.  | ■           |
| Improving our road management and engagement program.                                 |   | <p>The <i>Road Management Plan</i> was updated and adopted in 2018.</p> <p>Our <i>Roads to Success</i> promotion has had a lot of online interest and increased customer understanding of 'pot-hole' repairs.</p> <p>We are also progressing the <i>Paths to Success</i> lean improvement project, which aims at reducing outstanding defects in footpaths and kerb and channels.</p> | ■           |
| Delivering better-connected walking, cycling and trail paths across our region.       | <i>Upgrade existing roads, streets and footpaths.</i>   | <p>Funding to prepare a shared trails master plan was allocated in 2018–19.</p> <p>We issued a consultant's brief, and a draft base plan is due in the first quarter of 2019. This will be followed by community engagement in May 2019.</p>  | ■           |
| Advocating to improve rail, road and sea connections for our region.                  |   | The <i>Fast Rail to Melbourne</i> report was adopted by Council in December 2018. The report, presented to the Victorian Government, advocates for a faster rail service linking Geelong and Melbourne. The report was also presented to the G21 Transport Pillar in December 2018.   | ■           |
| Working with government to improve freight connections to the Geelong Port.           |   | Recent works at McLeod Street in North Geelong have improved access to the port. Regular meetings have been scheduled to inform future infrastructure projects.   | ■           |
| Advocating and planning for a second container port at Bay West.                      |   | We provide support to the G21 Transport Pillar on this issue as required. The group has responded to the Victorian Government call for submissions and we are awaiting further opportunities for input or a decision.   | Not started |

| Four year priorities<br>Council Plan 2018–22  | 2018–19<br>major aims  | Progress comment  | Status  |
|---|--|---|---|
| Supporting further international flights at Avalon.   |  | <p>Tourism Greater Geelong and The Bellarine continues to work closely with both Avalon Airport and Air Asia to promote the new Avalon services in the following ways:</p> <ul style="list-style-type: none"> <li>• media and travel trade familiarisations of the region</li> <li>• volunteers providing visitor information services at Avalon</li> <li>• facilitated filming of video encouraging visitors to 'Turn Left' on arrival at Avalon</li> <li>• creating a flyer on Geelong and the Bellarine experiences for flight crew to do on their lay over</li> <li>• training programs for ambassadors who work with and support departing and arriving passengers.</li> </ul> <p>Avalon Airport is now a Tourism Greater Geelong and the Bellarine platinum partner.</p> <p>Efforts continue to attract additional airlines, new routes and destinations to Avalon, with further flight announcements anticipated in mid-2019.</p> <p>Research will commence in the first quarter of 2019 to better understand the travel patterns of Air Asia inbound passengers. Work will also commence on promoting Air Asia to the student market in Geelong, with the aim of boosting visits from family and friends.</p> |    |
| Supporting the redevelopment of the rail station precinct, including a modern bus terminal. |  | Development Victoria has completed their peer review of the master plan and prepared a suite of recommendations, including a staging plan for consideration by the Victorian Government.  |    |
| Delivering the Better Bike Connections project.   |  | An appropriately robust engagement with the community has meant that this project is delayed. Council will consider the southern link of the Better Bike Connections project at the Council Meeting on 30 April 2019. This will determine the outcome of this key priority.   |   |
|   | <i>Investigate and develop parking solutions in Central Geelong.</i> | The Revitalising Central Geelong partnership have concluded a consultation period for the Central Geelong Car Parking Discussion Paper. The consultation allowed members of the community, as well as holidaymakers and visitors to the region, to provide their feedback on transport and parking options. The feedback will influence a Central Geelong Parking Strategy, to be developed in 2019.  |  |

## LINKS TO THE CLEVER CREATIVE VISION



# A THRIVING AND SUSTAINABLE ECONOMY

We will capitalise on Geelong’s incredible economic opportunities.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success                         | Frequency | Baseline          | Target 2022 | YTD Mar 2019 | Progress comments  | Status |
|---|-----------|-------------------|-------------|--------------|--------------------|--------|
| More businesses within the municipality.    | Annual    | 17,336 businesses | Increase    | -            | Reported annually. | △      |
| 15 years of industrial land supply planned. | Annual    | 21 years          | Maintain    | -            | Reported annually. | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims  | Progress comment   | Status |
|---|---|--|--------|
| Continuing to work with government to deliver projects that revitalise Central Geelong. |   | The Revitalising Central Geelong partnership, jointly funded with the Victorian Government, is continuing to deliver on the <i>Revitalising Central Geelong Action Plan</i> . Recent activity includes: <ul style="list-style-type: none"> <li>• Malop Street Green Spine Block 1 design</li> <li>• new laneway breakthroughs at Denny's Place and Market Street</li> <li>• planning for Green Spine Blocks 3 to 6</li> <li>• consultation on Central Geelong Parking</li> <li>• commencement of the Urban Design Framework Activity Centre Zone review</li> <li>• progressing the Transport Network Operating Plan and Bus Service Review.</li> </ul>   | ■      |
| Working with government to deliver City Deal projects.                                  | <i>Work with government and local stakeholders to scope City Deal projects.</i> | Council has resolved to authorise the Mayor to endorse the Geelong City deal in a Council meeting on 26 March 2019. This state and federal government funding has a focus on the visitor economy and will help deliver key projects to drive the local and regional economy. Some of the projects for Geelong include: <ul style="list-style-type: none"> <li>• Convention and Exhibition Centre</li> <li>• Central Geelong Revitalisation</li> <li>• the Waterfront Safe Harbour project.</li> </ul> The City is contributing more than \$17 million in funding to projects that fall within the City of Greater Geelong.   | ■      |
| Using Geelong’s UNESCO City of Design award to secure economic development projects.    |   | In partnership with the National Gallery Victoria (NGV), Geelong hosted over 20 events as part of Melbourne Design Week in March. <p>The City hosted the UNESCO Creative Cities Network (UCCN) - Geelong Stakeholder Day which was attended by 150 people and featured three speakers from the UCCN representing the cities of Dundee and Kortrijk. The event highlighted the importance of design across the community, how it can be used to improve the liveability of Geelong and plans for the next 12 months including community engagement activities.</p> A representative from the City and Deakin University attended the Singapore Design Week to support the City of Design UNESCO Public Forum Event delivered by the Singapore Design Council. Geelong presented at the forum and took part in a panel of experts discussing the importance design for business and education. | ■      |

| Four year priorities<br>Council Plan 2018–22                     | 2018–19<br>major aims   | Progress comment  | Status |
|--|---|---|--------|
| Attracting new investments to the region.                        |   | <p>The City has hosted several delegations to Geelong over the past quarter including:</p> <ul style="list-style-type: none"> <li>representatives from UNESCO Cities of Design; Dundee, Scotland and Kortrijk, Belgium. The delegates were invited to share the design journey of their cities at Geelong’s UNESCO stakeholder event.</li> <li>delegates from our sister city Lianyungang, China enhancing relationships with the City and institutions including The Gordon and Deakin University.</li> </ul> <p>We have also:</p> <ul style="list-style-type: none"> <li>hosted the Geelong Defence Alliance stand along with Deakin at the Avalon Airshow. Local businesses including XTM, Flaim Systems, McHugh and Eastwood and CLOS were represented on the stand, providing business exposure to the Defence market.</li> <li>been supporting businesses including Organic Dairy Farmers Australia, Vestas, ALE Heavy lift and Hanwha.</li> <li>assisted 12 small businesses with preliminary advice including the relevant regulations and preferable business locations through the Better Approvals Process.</li> </ul> | ■      |
| Helping to renew industrial precincts.                           |   | Work to implement the <i>West Fyans Structure Plan</i> and the <i>Pakington Street Urban Design Framework</i> is underway. These projects will help transition older industrial areas to a mix of contemporary employment and residential uses.   | ■      |
| Executing strategies for economic growth in the region’s north.  | Identify opportunities for economic growth in the region’s north. | We are working on a joint project to ensure the planning and economic activities enable employment opportunities in the north of the municipality. This initiative needs additional discussion and development to ensure the progress of agreed activities in the 2019-20 financial year continue to align with Council expectations and meet our commitments to the community in the region’s north.   | ◆      |
| Supporting and promoting local businesses, markets and products. |   | <p>Council is sponsoring the <i>Girledworld</i> Geelong Youth Innovation Summit, a three day event in May to help to students explore the future skills, entrepreneurial mindsets and practical STEM knowledge they will need to lead, succeed and thrive in their future careers.</p> <p>We also continue to provide a number of programs designed to support small business in the region. These include:</p> <ul style="list-style-type: none"> <li>Business Victoria workshops</li> <li>Australian Taxation Office workshops</li> <li>Free business mentoring through Business Victoria’s mobile business centre.</li> <li>partner and support programs delivered by ManuFutures, Runway, Geelong Manufacturing Council and the Chamber of Commerce.</li> </ul>   | ■      |
|  | <i>Make land available to attract new industry.</i>               | We completed industrial land supply monitoring in 2018. There has been a significant increase in demand in recent years, but sufficient supply remains for at least 20 years.   | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



A PROSPEROUS ECONOMY  
THAT SUPPORTS JOBS AND  
EDUCATION OPPORTUNITIES

# GROWING OUR TOURISM AND EVENTS

Our tourism and events offering is strong, but we aim to grow it further.

■ On track    
 ◆ Needs improvement    
 ■ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success   | Frequency | Baseline                      | Target 2022            | YTD Mar 2019 | Progress comments  | Status |
|---|-----------|-------------------------------|------------------------|--------------|--------------------|--------|
| Annual increase in visitors.                                      | Annual    | 5.1 million (Apr 17-Mar 18)   | 2.1 per cent per annum | -            | Reported annually. | △      |
| Annual increase in expenditure by visitors.                       | Annual    | \$936 million (Apr 17-Mar 18) | 3.8 per cent per annum | -            | Reported annually. | △      |
| Annual increase in international overnight visitors.              | Annual    | 55,900 (Apr 17-Mar 18)        | 4.9 per cent per annum | -            | Reported annually. | △      |
| Annual increase in domestic overnight visitors.                   | Annual    | 1.3 million (Apr 17-Mar 18)   | 1.9 per cent per annum | -            | Reported annually. | △      |
| Annual increase in tourism employment.                            | Annual    | Estimated 5,906               | 1.6 per cent per annum | -            | Reported annually. | △      |
| Return on investment of Geelong major events to the municipality. | Annual    | 46:1                          | 30:1                   | -            | Reported annually. | △      |

| Four year priorities Council Plan 2018–22   | 2018–19 major aims   | Progress comment   | Status |
|---|--|--|--------|
| Working with government to deliver City Deal tourism infrastructure projects, including the Convention and Exhibition Centre. |  | Both Federal and State governments have committed to the City Deal which has also been signed off by the City. Projects in the City Deal that relate to the Visitor Economy and projects include: <ul style="list-style-type: none"> <li>the Convention and Exhibition Centre</li> <li>Delivery of Shipwreck Coast Masterplan</li> <li>Revitalisation of Central Geelong,</li> <li>Safe Harbour Geelong</li> <li>the new ferry terminal for Queenscliff</li> </ul> | ■      |
| Delivering the <i>Visitor Economy Strategy 2017–21</i> and the <i>Tourism Development Plan</i> .                              | <i>Complete preliminary work for the establishment of the Mineral Springs Spa.</i> | The funding agreement with Regional Development Victoria to undertake bore integrity testing has been completed with results still being finalised. Results will trigger next steps and be used to determine immediate and longer term funding requirements.   | ■      |
|   | <i>Continue to attract cruise ships.</i>   | During the 2018-2019 summer, Geelong hosted three cruise ships (Seven Seas' Mariner, MS Regatta and Viking Sun) delivering close to 3000 visitors/crew to the region.  | ■      |
|   | <i>Support the Geelong Waterfront Safe Harbour Precinct Project.</i>               | A working group of technical and design specialists from the City and state government agencies will work with the Yacht Club to progress the master plan to satisfy the requirements of good design and public access.  | ■      |
|   | <i>Help to upgrade visitor facilities, experiences and accommodation.</i>          | A tourism development plan detailing the top 20 projects for the region was completed in February 2019. With visitation forecast to increase significantly, Geelong and the Bellarine will need to increase guest rooms to meet projected demand.  | ■      |
|   | <i>Commence construction of an artificial reef and underwater sculpture park.</i>  | Consultants have been engaged to oversee stage 1 of 'The Sunken Gallery' project. This includes: <ul style="list-style-type: none"> <li>formalising in principle support for the project by external stakeholders</li> <li>developing a marketing and communications plan, including consultation</li> <li>identifying project partners and funding opportunities.</li> </ul>  | ■      |

| Four year priorities<br>Council Plan 2018–22   | 2018–19<br>major aims   | Progress comment   | Status |
|--|---|--|--------|
| Building on the current events program and increasing cross-promotional opportunities. | <i>Continue to support high-quality events across the region.</i> | <p>Expression of interest documentation has been developed to engage artists with a local artist selected to install a work first commissioned for Mountain to Mouth, as a land based marker for the Sunken Gallery.</p> <p>Tourism Greater Geelong and The Bellarine (TGGB) continues to support major events with 'pop up' Visitor Information Centre including:</p> <ul style="list-style-type: none"> <li>• Avalon International Air Show</li> <li>• Great Australian Beer Festival.</li> <li>• G21 Agribusiness Forum's AFL Country Game</li> </ul> <p>The region's major events are now fully integrated into TGGB digital platforms, visitor guides and visitor information services.</p> | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



A DESTINATION THAT  
ATTRACTS LOCAL AND  
INTERNATIONAL VISITORS



A PROSPEROUS ECONOMY  
THAT SUPPORTS JOBS AND  
EDUCATION OPPORTUNITIES

# INNOVATIVE FINANCES AND TECHNOLOGY

Clever and sustainable financial management, matched with digital growth, will advance our future.

■ On track    
 ◆ Needs improvement    
 ● Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency | Baseline  | Target 2022   | YTD Mar 2019 | Progress comments  | Status |
|--|-----------|---|---------------|--------------|--------------------|--------|
| Better Wi-Fi access in community facilities and public spaces. | Annual    | 92 Wi-Fi access points across the city<br><br>11 council facilities with free community Wi-Fi | Increase      | -            | Reported annually. | △      |
| More online transactions with our customers.                   | Annual    | Payments – 114,257<br><br>Forms – 17,517<br><br>Requests for Service – 24, 074                | Increase      | -            | Reported annually. | △      |
| Less than 5 per cent budget variation (actual to budget).      | Annual    | -   | <5% variation | -            | Reported annually. | △      |
| Increased revenue streams.                                     | Annual    | -   | Increase      | -            | Reported annually. | △      |

| Four year priorities Council Plan 2018–22  | 2018–19 major aims                                       | Progress comment   | Status |
|--|--|--|--------|
| Delivering smart technology solutions to areas such as street lighting, parking, waste management and children’s services. |  | We are currently installing a LoRaWAN low powered sensor network across the municipality to enable the use of smart sensors. This is an important piece of infrastructure to enable the use of numerous sensors for services such as parking management, environmental monitoring, movement and people counting, waste management, asset usage and management. Approximately 150 sensors will be installed in April/May 2019.  | ■      |
| Delivering Smart Cities infrastructure using electronic data collection to better manage assets and resources.             |  | Installation of two data platforms to improve the collection, management, sharing and visualisation of data and open data sets is almost complete.<br><br>An internal data register will improve identification and collaboration of data sharing between our departments while and an open data platform to the public will enable greater access to council data.<br><br>Requests for supply of LIDAR (Light Detection and Ranging) data, has been out for quote and we are assessing contracts currently. LIDAR is used for many purposes including planning, engineering, urban design, infrastructure development, land development, surveyors, and 3D modelling. | ■      |
| Increasing free Wi-Fi in public spaces and community facilities.   |  | The grants funding has not yet been received which has caused this project to be delayed. We expect to start in late April 2019.   | ◆      |
|  | <i>Improve digital access for the Geelong community.</i> | Facilitation of the Whittington Digital Inclusion working group has led to Newcomb Library filling a local need around digital skill building. The City continues to work and partner on meeting digital needs of the community with a current focus on Whittington.   | ■      |

| Four year priorities<br>Council Plan 2018–22   | 2018–19<br>major aims                                    | Progress comment  | Status |
|--|--|---|--------|
| Developing digital tools and technologies to improve service delivery and our customer experience. | <i>Drive digital transformation in the organisation.</i> | Our financial systems and infrastructure management systems are key components of the Digital Transformation agenda. As such, we are going to market to seek better ways of delivering these services, through a competitive Request for Tender.  | ◆      |
| Establishing sustainable financial and infrastructure management systems for our future.           |  |   |        |
| Attracting more technology-focused businesses to our region.                                       |  | <p>We are working with various stakeholders in the region to support the tech industry, start-up and entrepreneurial sector including:</p> <ul style="list-style-type: none"> <li>• sponsorship of start-up businesses in the Runway program</li> <li>• working on a program led by ManuFutures to support the entrepreneurs in the manufacturing sector</li> <li>• sponsorship of the upcoming Pivot Summit in May.</li> </ul> | ■      |
| Examining our budget to fund future initiatives.   |  | We are currently scoping out initiatives for 2019–20, as part of the 2019–20 budget process. The draft budget is scheduled to be considered at the Council meeting on 30 April 2019.  | ■      |
|  | <i>Review the efficiency of our service delivery.</i>    | Our five year service planning process for designated services is now underway and scheduled to be complete by June 2019.   | ■      |

## LINKS TO THE CLEVER CREATIVE VISION



A LEADER IN DEVELOPING AND  
ADOPTING TECHNOLOGY



A PROSPEROUS ECONOMY  
THAT SUPPORTS JOBS AND  
EDUCATION OPPORTUNITIES









# ORGANISATIONAL LEADERSHIP, STRATEGY AND GOVERNANCE



We will be the 'leading voice' of the community by delivering confident governance and strategic planning.

■ On track    
 ◆ Needs improvement    
 ⬢ Off track    
 △ Not yet available    
 ✓ Complete

| Measures of success  | Frequency          | Baseline | Target 2022 | YTD Mar 2019  | Progress comments  | Status |
|--|--------------------|----------|-------------|---------------|--|--------|
| Increased community satisfaction with overall council performance.         | Annual             | 54       | >70         | -             | Reported annually.   | △      |
| Increased community satisfaction with customer service.                    | Annual             | 70       | >80         | -             | Reported annually.   | △      |
| Increased community satisfaction in decision-making.                       | Annual             | 53       | >60         | -             | Reported annually.   | △      |
| Increased community satisfaction with community consultation (engagement). | Annual             | 50       | >60         | -             | Reported annually.   | △      |
| Increased community satisfaction with overall council direction.           | Annual             | 54       | >70         | -             | Reported annually.   | △      |
| Reduction in Lost Time Injury Frequency Rate.                              | Every three months | 14.9     | Reduce      | 24.6          | The LTIFR has experienced an upwards trend due to a change in the definition of lost time injuries, reduced hours worked for the period and an increase in the actual number of lost time injuries. Various programs are currently underway to reduce the number of lost time injuries incurred by our people. | ⬢      |
| Increased employee engagement.   | Annual             | 54       | 70%         | -             | Reported annually.   | △      |
| Increased employee satisfaction.   | Annual             | 62       | 80%         | -             | Reported annually.   | △      |
| Increased positive media coverage.   | Every three months | 55%      | Increase    | Average 63.9% | Our average positive media sentiment of 63.9% is our highest (average) score since we began independent media analysis in August 2015. It reflects a slow but steady rise in the City's positive portrayal by most media.  | ■      |

| Four year priorities Council Plan 2018–22                 | 2018–19 major aims | Progress comment   | Status |
|---|--------------------|--|--------|
| Proactively managing our assets, including land holdings. |                    | The Asset Management Transformation Project is progressing, with: <ul style="list-style-type: none"> <li>the final draft policy ready for approval by the Asset Management Steering Committee</li> <li>the framework and strategy progressing well</li> <li>creation of asset management plan templates for each category type.</li> </ul> These components will all be completed by February 2019. Recruitment of key roles providing much needed expertise to deliver this major change project is now complete. | ■      |

| Four year priorities<br>Council Plan 2018–22                                      | 2018–19<br>major aims   | Progress comment  | Status  |
|---|---|---|---|
| Consolidating the City of Greater Geelong offices.                                | <i>Plan for consolidating Council offices.</i>                      | The City is currently working with three shortlisted developers to present high quality, innovative concepts for the new precinct. We will be engaging with the community, our employees and stakeholders over the coming months to gather a wide range of ideas for the new precinct, including public open space and connections with other key parts of central Geelong.   |    |
| Communicating and engaging more effectively with the community, in areas of need. |   | We have commenced community engagement to identify needs in the following priority areas: <ul style="list-style-type: none"> <li>• access and inclusion</li> <li>• lifelong learning and jobs</li> <li>• digital inclusion</li> <li>• community resourcing.</li> </ul> <i>Whittington Works - Opportunity East</i> community engagement activities have built awareness of support available and recruitment to the <i>Education to Employment</i> project. Grovedale Neighbourhood House has conducted a community engagement project to look at better ways to foster an inclusive environment and engage local community members.          |    |
| Continuing to transform our workplace culture.                                    | <i>Implement the actions in the annual employee opinion survey.</i> | We have implemented the Executive Action Plan and undertaken face-to-face employee engagement forums on the employee opinion survey throughout the organisation. We have reviewed the management action plans. The second phase of this initiative is to develop new ways to engage with our people across the City, which will commence in the 2019-20 financial year.   |    |
| Using data and analytics to make better decisions.                                |   | We are continuing to refine ways of using data to report on organisational performance. This has been delayed due to the need to first develop a performance monitoring framework, which will give a holistic view of performance across the organisation.  |  |
| Making our processes more effective and efficient.                                |   | Over 500 employees have participated in Introduction to Lean Thinking training, with a total of 32 completing the Lean Basics training.<br><br>Three business improvement projects are complete so far this financial year, with another 20 currently being supported across various departments to create better customer outcomes while using less effort and resources.<br><br>As demand for support outweighs our capacity to deliver, there has been a delay in the development of the Lean Basics and Lean Leader training programs. Recruitment is underway to increase our ability to provide assistance with these tasks.            |  |
| Increasing state and federal funding for the region.                              |   | We are continuing to advocate for regional priorities, in partnership with G21 and the Committee for Geelong. A number of funding announcements have recently been made including the finalisation of the City Deal and the Australian Government support of Fast Rail for Geelong.   |  |
| Developing, promoting and improving the City's brand.                             |   | We continue to advance several projects to enhance the City's brand, including: <ul style="list-style-type: none"> <li>• new in-house writing programs for officers, based on our writing standard</li> <li>• redesign of signage on animal management vehicles</li> <li>• a range of City-branded collateral (including brochures, print and online advertisements) to support and advance the City's lead role in Geelong's status as a UNESCO City of Design; and</li> <li>• additional marketing material to support and contribute to a range of events for the inaugural Melbourne Design Week in Geelong during March 2019.</li> </ul> |  |
| Leading major local organisations in collaborative projects.                      |   | We will continue to bring together key regional stakeholders, via our Vision Partner Group. Membership of the Vision Partner Group has been reviewed and expanded   |  |

|  |  |   |   |
|--|--|---|---|
|  |  | with the first meeting of the refreshed group held in February 2019.  |   |
| Using better communication to strengthen our strategic priorities. | <i>Strengthen strategic, governance and communication frameworks.</i>  | Our annual Christmas program concluded at the end of January 2019, with record attendances and estimated economic benefits for our regional community -- thanks in part to a proven marketing and media campaign.<br>In late January we commenced a new year of Community Focus and City Hall-based council meetings, with excellent public interest and attendance supported by improved marketing and public engagement.<br>We continue to successfully promote Geelong's status as a UNESCO City of Design, which in turn supports the objectives of the current Council Plan, and our 30-year clever and creative vision. |    |
|  | <i>Convene a Junior Council, with input into decision making, to improve engagement with young people.</i>         | Twelve local young people have been elected to the new Greater Geelong Youth Council, and will now serve as the region's official 'youth voice'. Aged between 12 and 16, the youth councillors represent a wide spread of local towns and suburbs, with three representatives from each of the four Council wards. Geelong's first ever Junior Mayor was elected from among the group in February. The Youth Council will meet once a month at City Hall. The Junior Mayor will then present the group's findings and recommendations to Council on a quarterly basis.  | ✓   |
|  | <i>Begin five-year service planning.</i>   | Our five-year service planning process is well underway, with all designated services due to complete plans by 30 June 2019. Delivery of these plans will set the foundations for service delivery over the coming years, and allow the organisation leaders and councillors to make informed, comparative decisions about investment in service delivery for the future.   |    |
|  | <i>Strengthen relationships with neighbouring councils, including G21 region councils and the City of Wyndham.</i> | Our Mayor and Chief Executive Officer are both on the board of G21 - Geelong Region Alliance.<br>The CEO meets monthly with G21 CEO's and also meets frequently with the CEO of Wyndham to strengthen ties and discuss common projects.   |  |

## HIGHTON CHILDRENS CENTRE

Our new five-star energy rated Highton Child and Family Centre was officially opened in March, providing young families in the area a wide range of services, including kindergarten, maternal and child health, after school care and playgroup.



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## CITY OF GREATER GEELONG

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## CUSTOMER SERVICE CENTRE

100 Brougham Street

Geelong VIC 3220

8.00am – 5.00pm

ISBN: 978-0-6483576-0-5

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The *Council Plan 2018–22* is supported by the *Strategic Resource Plan 2018–22*.

The *Annual Action Plan and Budget* outlines the major initiatives to be funded each year in order to deliver the plan.

For a copy of the current documents go to [www.geelongaustralia.com.au](http://www.geelongaustralia.com.au) or call 5272 5272.

## **5. WOMEN IN COMMUNITY LIFE ADVISORY COMMITTEE (WICLAC) - APPOINTMENT OF NEW MEMBERS 2019**

**Source:** Community Life – Healthy Communities  
**Director:** Robyn Stevens  
**Portfolio:** An Inclusive and Diverse Community

### **Purpose**

1. To seek endorsement from Council to appoint new members to the Women in Community Life Advisory Committee.

### **Background**

2. The Women in Community Life Advisory Committee (WiCLAC) was established in 2013 to provide advice to Council on matters relating to women's participation, representation and leadership in community life.
3. The WiCLAC is a proactive and dedicated group, focussed on achieving positive outcomes of equality, inclusion and respect for women in the Geelong region. Members must demonstrate:
  - 3.1 Commitment to furthering women's participation, representation and leadership in community life;
  - 3.2 Commitment to the Victorian Local Government Women's Charter;
  - 3.3 Commitment to advocacy of Ba-Gurrk, A Gender Equity Framework for the Greater Geelong Region;
  - 3.4 Involvement in women's and other networks;
  - 3.5 Commitment and time to actively participate on the Committee; and
  - 3.6 Capacity to share and promote the work of the Committee to others.

### **Key Matters**

4. The Committee called for applications to fill the roles of recently vacated members. There are currently six members and the terms of reference (**Attachment 2**) allow for eight to 12 members.
5. The opportunity to apply was promoted via social media and relevant networks, as well as contacting people who had previously expressed interest in joining the Committee. The term of the appointment is until early 2021. A new terms of reference, currently being drafted, will align committee members' terms with the conclusion of Council elections.
6. Applications were lodged on the Geelong Australia website and 11 were received. The applications were assessed by a panel comprising two WiCLAC members and one City officer. The assessment panel recommend the appointment of Lynne Beaumont, Emma Cvitak, Rachel Drady, Emily Kerr, Soraya Mobayad and Kara Tieman (bios at Attachment 3), who would bring relevant skills and experience to the Committee.

### **Cr Mansfield moved, Cr Sullivan seconded -**

7. **That Council appoint Lynne Beaumont, Emma Cvitak, Rachel Drady, Emily Kerr, Soraya Mobayad and Kara Tieman to the Women in Community Life Advisory Committee for a term ending no later than 31 March 2021.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. There are no significant financial implications. Under its terms of reference, the WiCLAC has no financial delegation authority.

### ***Community Engagement***

2. The opportunity to apply for WiCLAC membership was promoted via social media and relevant networks, as well as contacting people who had previously expressed interest in joining the Committee.
3. This Committee, in the course of its work, engages with the City's leadership and the broader community in relation to improving civic, economic and general opportunities for women.

### ***Social Equity Considerations***

4. WiCLAC has the following social equity objectives:
  - 4.1 Advocacy - to advocate across the Geelong region for women to be actively involved in decision making processes that deliver relevant, responsive and inclusive outcomes;
  - 4.2 Education and Training - to promote opportunities for women to undertake training, leadership and volunteering; and
  - 4.3 Raising Awareness - explore opportunities for WiCLAC to link with, support and promote activities, events and campaigns that align with its purpose.
5. The Committee clearly aligns with, and is supported by the United Nations Human Rights Charter. Principles of freedom, respect, equality and dignity are promoted by the HRC, and these are incorporated in the Victorian Local Government Women's Charter, which is a guiding document to the Committee.
6. As this group provides a voice and reference for women across the region, the City aims to ensure it is reflective of the community in which we live. With that in mind, group membership includes people of all abilities, diverse ages, cultures, geographical locations and life experiences.

### ***Policy/Legal/Statutory Implications***

7. There are no statutory implications.
8. The Committee reflects Council's position as a signatory to the Victorian Local Government Women's Charter.
9. The Ba-gurrk Gender Equity Framework for the Greater Geelong Region, endorsed by Council in February 2019, informs the direction of WiCLAC, alongside the Victorian Local Government Women's Charter 2010. WiCLAC will provide advice and input into the implementation of the Ba-gurrk Gender Equity Action Plan, currently being developed, and review its progress as required.

***Alignment to Council Plan***

10. All aspects of Council Plan 2018-22 can be delivered by considering a gender equal approach; ensuring consultation, project development, design, management and governance have equal representation and input from women.
11. In particular, strategic priority 1 'Improved Health and Safety of Our Community'; key priority 1 'Showing leadership in gender equity, diversity and family violence prevention' is the core work of WiCLAC.

***Conflict of Interest***

12. No City officers or contractors who have provided advice in relation to this report have declared a conflict of interest regarding the matter under consideration.

***Risk Assessment***

13. There are a number of reputational and governance risks if new members are not appointed to the committee:
  - 13.1 The committee is at risk of not achieving quorum;
  - 13.2 There is reduced capacity for the committee to achieve its goals; and
  - 13.3 There are reduced opportunities for people to contribute to the City's work in gender equity.

***Environmental Implications***

14. There are no environmental implications arising from the subject of this report.

# COMMITTEE TERMS OF REFERENCE



|  |                                |                  |
|--|--------------------------------|------------------|
| <b>Women in Community Life<br/>Advisory Committee</b>              | Document No:                   | CTR295.12        |
|  | Approval Date:                 | 25 February 2015 |
|  | Approved By:                   | Council          |
|  | Review Date:                   | March 2017       |
| Responsible Officer:<br><b>General Manager, Community Services</b> | Expiry Date:                   | N/A              |
|  | Version No:                    | 01               |
| Authorising Officer:   | <b>Chief Executive Officer</b> |                  |

## 1. PURPOSE

The purpose of the Women in Community Life Advisory Committee (WiCLAC) is to provide advice to Council on matters relating to women's participation, representation and leadership in community life.

The target area for the work of the Committee is the municipal boundary of the City of Greater Geelong. The Committee recognises that Geelong is a place where people live, work, study or visit for business, social or leisure based activities, and residents reflect enormous diversity of age, experience and opportunity.

The Committee will promote and celebrate successes, milestones and participation of women. The Committee will advise Council on barriers to women's participation, emerging women's issues, aspirations and initiatives so as to further progress gender equity in the Geelong community.

The Victorian Local Government Women's Charter will inform the direction of the Committee. Each key principle of this Charter assists to create a strong framework for action and change.

Specifically, the Committee is established to:

- Identify barriers to women's participation in the civil, civic and political life of the Geelong community.
- Increase opportunities and access for women to participate in leadership and decision making committees and processes.
- Increase active participation of women in community groups and networks.
- Be inclusive, representative and encouraging of women of all demographics.
- Invite comment and feedback from individuals, community groups and organisations on strategies that address local based priorities for increased women's participation, representation and leadership.
- Provide advice on current or emerging gaps in gender equity, women's participation, representation and leadership.
- Promote open and transparent policies, processes and practices, and highlight the right of all persons, and particularly women, to take part in public life.
- Build on existing links between agencies and community groups.

## **2. CONTEXT**

There is much scope to create and implement strategies and actions to achieve greater gender equity. This Committee also provides an opportunity to showcase areas of best practice by community groups, organisations and government.

Significant milestones and achievements have been reached by women in Greater Geelong. The Committee provides a vehicle to promote and assist in creating new opportunities for women who aspire to participate in community life and decision making processes.

The Committee comes from a combined Community Development and Human Rights approach of working with, and supporting people 'where they are at', while recognising that every person has the right to take part in public affairs without discrimination (Section 18 Victorian Charter of Human Rights and Responsibilities Act. 2006). Through strong links, partnerships, strategies and opportunities, some existing barriers to participation will be diminished. This will enable an increased number and diversity of women in greater decision making processes and participatory events.

The work of the WiCLAC strengthens Council's commitment to the Victorian Local Government Women's Charter, which the City of Greater Geelong Council endorsed in 2010. The Charter identifies support for three principles: Gender Equity, Diversity, and Active Citizenship.

The Committee will embrace and build on the Women in Local Democracy forum in March 2012. This forum was an opportunity to recognise and celebrate the significant work and participation by women in Geelong.

The Committee will utilise the tool, Why Gender Matters, Ten ways local government can advance gender equity, developed in 2012 by the Gender Equity in Local Government Partnership of Victorian councils, regional Women's Health Services, VicHealth and the Municipal Association of Victoria.

## **3. OBJECTIVES**

The objectives for the WiCLAC shall be determined in consultation with the Committee members.

## **4. DEFINITIONS**

WiCLAC – Women in Community Life Advisory Committee

CoGG – City of Greater Geelong

## **5. TERMS OF REFERENCE**

### **5.1 Number of members and eligibility**

- The Committee will consist of 10–12 members plus Council representatives.
- The City of Greater Geelong will seek to select appropriate individuals based on expertise, involvement in women's and other networks, and will recruit a balanced Committee with regard to age, geographic location, etc, where possible.

- Membership of the Committee will be open to both women and men. This recognises that to achieve gender equity, changes in all areas of communities, organisations and Government, understanding, commitment and effort will be required by both men and women.
- The Committee must reflect diversity of local communities.
- Members must live, work, study or visit for business, social or leisure based activities in the City of Greater Geelong.
- Members should attend at least 50% of meetings called within the preceding twelve months. Any action arising from non-attendance would be at the discretion of the Committee.
- All members are expected to actively participate on the Committee and use their influence to impact change within their organisations, networks and the wider Geelong community. This could include:
  - recognition of aspirations and initiatives as part of budget development and delivery of services.
  - review and refinement of relevant policy and procedures.
- Committee members are expected to provide feedback, share, and promote the actions and deliberations of the Committee within organisations, networks, and or the wider community.
- Council shall determine appointments to vacancies on the advice of the committee
- Term of appointment for two years. Maximum of two consecutive terms (4 years).
- Casual vacancies can be filled at the discretion of the Committee for the remaining term of the membership.

## **5.2 Chairperson and Councillor Representatives**

- Council will nominate two representatives to the Committee.
- One Council representative will be the Women in Community Life portfolio holder who will chair the Committee.
- The second Council representative will be nominated by Council.
- Other Councillors of CoGG are welcome to participate as non-voting members.

## **5.3 Timing, place and regularity of meetings**

- The Committee will meet quarterly, but may meet more regularly when it deems necessary.
- Calendar of meeting dates will be set annually and updated if required.

## **5.4 Ability to call meetings at any time**

- A meeting of the Committee will not be called with less than two weeks' notice to all members, unless there are exceptional circumstances.
- Working group meetings may be called by the Committee.

## **5.5 Authority of the Advisory Committee**

- The Committee is an Advisory Committee for the purposes of the Local Government Act, therefore does not have delegated authority, and reports to Council as required.
- The Committee may appoint working groups to pursue specific projects and issues as appropriate, on the basis of special interest.
- The Committee has no financial delegation authority.

## **5.6 Numbers constituting a quorum – Six members**

- A quorum is six (6) members, not including Council officers or Councillors.
- If less than six members attend, the meeting may proceed but no decisions can be made.

## **5.7 Conduct of meetings**

- The Chairperson shall chair the meetings, taking account of both the need for efficiency and the importance of accountability.
- If the Chairperson is not present the meeting will be chaired by one of the members present.
- A Council officer shall prepare the agenda for every Committee meeting in consultation with the chair and circulate the agenda and any meeting papers to Committee members before the meeting.

## **5.8 Timing for meeting agendas before a meeting**

- Wherever possible distribution time for agendas is one week prior to the scheduled meeting date.
- Minutes from the Committee meeting will be circulated one week after the meeting has been held or as soon as practical.

## **5.9 Record keeping**

- A Council officer will support the Committee.
- Minutes of actions and decisions will be recorded and distributed to Committee members.
- Minutes, reports and correspondence of the WiCLAC will be registered in Council's record keeping software (currently Dataworks).

## **5.10 Nature and timing of reports**

- The Committee shall report to Council providing an update of committee activities as required.

## **5.11 Evaluation**

- The Committee will review its operations every two years.
- A copy of this review will be forwarded to Council.

## 5.12 Matters constituting conflicts of interest and confidentiality

- If a Committee member determines that they have a Conflict of Interest in any matter which is to be considered at a meeting of the Committee then that person must:
  - If he or she intends to be present at the meeting, disclose the nature of the interest immediately before the consideration or discussion; or
  - If he or she does not intend to be present at the meeting, disclose the nature of the interest to the Chairperson of the Committee at any time before the meeting is held.
- While any vote or discussion is taken on the subject matter the member must:
  - Leave the room and notify the Chairperson that he or she is doing so; and
  - Remain outside the room and any gallery or other area in view or hearing of the room.
- The Chairperson of the Committee must record the declaration and the nature of the interest in the minutes of the meeting.

## 5.13 Relationship of the committee to Council, CEO and other local government employees

- The Committee will be supported by a Council officer.
- The Committee meetings will be chaired by the Council portfolio holder for Women in Community Life.
- Access to information and request for support from Council departments will be led through the Committee Chairperson.

## 5.14 Facilities and resources

- The Committee shall not be directly funded. The cost of the Committee administration, programs and events shall be borne by Council within the standard Council budget process.

## 6. QUALITY RECORDS

Quality Records shall be retained for at least the period shown below.

| Record                  | Retention/Disposal Responsibility | Retention Period | Location  |
|-------------------------|-----------------------------------|------------------|-----------|
| Meeting minutes/agendas | Committee                         | Permanent        | Dataworks |
| Correspondence          | Committee                         | Permanent        | Dataworks |
| Submissions             | Committee                         | Permanent        | Dataworks |

## 7. ATTACHMENTS

- Victorian Local Government Women's Charter

# WOMEN IN COMMUNITY LIFE ADVISORY COMMITTEE



## NOMINATIONS FOR ENDORSEMENT 14 MAY 2019

### **Lynne Beaumont**

Lynne brings a range of experience and knowledge that includes: being part of Shell Australia Gender Balance National Advisory Board; numerous local committees such as Northern Futures, Open House Geelong and Geelong Cricket Club's Pink Stump Committee. Lynne has worked closely with schools and organisations that encourage young women in education and through female talent interventions.

### **Emma Cvitak**

Emma is a community lawyer with Barwon Community Legal Service and as such has a strong commitment to social equity. Her commitments include being part of the Barwon Elder Abuse Network, National Social Security Rights Network and on the Planning Group for the Barwon Respect Cup. Emma has a strong commitment to equity, preventing violence against women and children, diversity and human rights.

### **Rachel Drady**

Rachel sits on the Central Geelong Marketing Committee and is part of the GMHBA staff group for Reward and Recognition, Marketing and Compliance Review. Rachel is very keen to give back to her community, represent women and be a more active citizen. As a young woman wishes to take the opportunity to engage with women who bring other experiences, expertise and gain from their wisdom.

### **Emily Kerr**

Emily has a PhD in STEM related sciences and as such is very engaged in supported opportunities for young women in STEM disciplines. In participating in the WiCLAC Emily is interested to learn about the functioning of Local Government and initiatives to bring about real change. Emily is a gender equity advocate at Deakin University.

### **Soraya Mobayad**

Through Soraya's involvement in many community art projects, as well as new experiences in education, Soraya has come to notice that there is less representation of women and particularly women with diverse cultural and social backgrounds, and is keen to see these women thrive.

Whilst fortunate to work in the positions held, there have been numerous occasions where she has struggled to be taken seriously as a young woman. Furthermore, in 2017 Soraya was selected for the Emerging Cultural Leaders Program at Footscray Community Arts Centre, where she undertook a six-month mentorship in all aspects of inclusive and accessible artistic programming for diverse communities.

### **Kara Tieman**

Kara's community involvement includes: Women's Melbourne Network - Membership, Empowered Together – Chief Marketing Officer and with the UN Women – International Women's Day Melbourne Committee member. Kara is deeply committed and passionate about

gender equity and as a new resident to Geelong interested in supporting and being part of actions with likeminded people. In addition, Kara has volunteered with the Workplace Gender Equality Agency, Victorian Women's Trust, National Folk Festival ( Disability Access) and been employed as an Equity Project Officer at Deakin among many other roles.

The current members of the Women in Community Life Advisory Committee:

Christine Couzens  
Shurlee Swain  
Jeni Wills  
Stevie Van derChys  
Erica Wastell  
Simone Stevens

## **6. G21 REGIONAL HOCKEY STRATEGY – FINAL REPORT**

**Source:** Community Life – Social Planning & Investment  
**Director:** Robyn Stevens  
**Portfolio:** Social and Infrastructure Planning

### **Purpose**

1. To seek Council endorsement for the *G21 Regional Hockey Strategy*.

### **Background**

2. The *G21 Regional Hockey Strategy* (Strategy) identifies a collective direction for hockey across the region. The strategy provides a framework to support the future development, governance and growth of the sport over the next 10 years. The strategy is a collaborative planning project between the G21 Region Alliance, local government authorities (LGAs) in the G21 Region, Hockey Victoria and other key stakeholders. Council approved the release of the draft *G21 Hockey Strategy* for a six-week public exhibition period in October 2018.

### **Key Matters**

3. The development of the strategy included comprehensive consultation with the hockey community; including workshops with key stakeholders, a member survey, a six-week public exhibition period and a Project Control Group (PCG) with representatives from each G21 council and Hockey Victoria.
4. The document has been endorsed by the G21 Sport & Recreation Pillar and will proceed to the G21 Board for endorsement following Council's resolution.
5. The strategy has identified 6 strategic priorities which aim to improve and develop the sport. These are:
  - 5.1 Priority 1 - Provide functional and accessible hockey facilities;
  - 5.2 Priority 2 - Increase capacity of existing facilities and deliver new pitches to meet future demand;
  - 5.3 Priority 3 - Increase hockey participation through improved programming;
  - 5.4 Priority 4 - Embrace new formats that engage new participants;
  - 5.5 Priority 5 - Adopt strategies that support the development of sustainable clubs; and
  - 5.6 Priority 6 - Promote hockey in the G21 region through collective marketing strategies and initiatives.
6. There are no immediate investment or resource implications for the City in the final strategy.
7. The main priority in the strategy is to improve participation and access to existing hockey facilities in the region.

**Cr Murrhly moved, Cr Nelson seconded -**

8. **That Council endorse the final *G21 Regional Hockey Strategy*.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. There are no financial implications arising from this report.
2. Funding for strategy actions in the future will be sought through a range of funding opportunities and through Council's annual budget process.

### ***Community Engagement***

3. The strategy provides a strategic framework to support the development, governance and growth of hockey in the G21 region over the next 10 years.
4. The strategy demonstrates that, to achieve the identified strategic priorities, there must be a collaborative approach between sport, local and state governments.
5. The strategy provides regional directions and recommendations, as well as prioritising actions to be delivered by Hockey Victoria, Geelong Hockey Association, local clubs and LGAs.
6. The development of the strategy has included comprehensive consultation with the hockey community alongside a Project Control Group (PCG) comprising representatives from each G21 council, Hockey Victoria and the Geelong Hockey Association.
7. Consultation with stakeholders included a workshop and a member survey of all registered players within the region. In addition, public exhibition of the draft strategy was undertaken between 26 October 2018 and 7 December 2018 with a total of 18 submissions received from both individuals and clubs (**Attachment 3**). The submissions resulted in two minor changes to the document with content being approved by the Project Control Group (PCG).
8. The key findings from the community engagement period during the development of the strategy have identified:
  - 8.1 A need for better quality hockey facilities and supporting amenities;
  - 8.2 Employment of a Hockey Victoria regional club development officer;
  - 8.3 Additional satellite facility provision to minimise travel times as this was considered to be a significant barrier to participation;
  - 8.4 Partnerships with councils, Hockey Victoria and state government to further develop the game; and
  - 8.5 Strategies to recruit new participants and increase participation.
9. As a result of the engagement and the ongoing work through the PCG, the strategy has identified six strategic priorities. These are:
  - 9.1 Provide functional and accessible hockey facilities – The strategy identified that existing hockey facilities, particularly those on education land, could be activated more broadly to support participation. With fewer hockey pitches in G21 than in comparison to more popular sports, there is general consensus among the hockey community that there is a requirement to travel to play hockey. The opportunity to improve access to existing pitches will assist in the provision of satellite and training venues for local demand. A critical action under this priority is for Hockey Victoria and the Geelong Hockey Association to strengthen partnerships with schools to facilitate broader hockey facility access;

9.2 Increase the capacity of existing facilities and deliver new pitches to meet future demand - Floodlighting is identified in the strategy as a way to support participation growth through increasing the capacity of existing venues. While the provision of hockey pitches to population ratio is well within recommended limits, floodlighting existing venues will allow these facilities to be programmed longer throughout the winter season, improving opportunities for people to participate. As most hockey pitches in G21 are located within Geelong's municipal boundaries, there is not equitable access to facilities across the network. The majority of senior hockey competition and training is at Stead Park, Corio which presents a barrier due to travel time, particularly for those outside Geelong. There are important actions for that support this strategy, including:

- (a) The City to work in partnership with Hockey Victoria to advocate for the inclusion of multi-purpose hockey pitches within the Armstrong Creek West Regional Sporting Precinct. The draft master plan for this precinct identifies two multi-use hockey pitches alongside soccer and tennis facilities. The strategy identifies the importance of hockey retaining this presence to assist in addressing the gap in hockey facilities from a regional perspective in the medium to long term;
- (b) The City to support the development of a floodlit synthetic pitch at King Lloyd Reserve as per the reserve's master plan. This development however will be subject to further detailed investigations prior to any funding commitment being made and will need to demonstrate widespread participation outcomes as a result; and
- (c) Finally, the delivery of a new local multipurpose synthetic facility in the Torquay Sports Precinct in partnership with Surf Coast Secondary College in the short term will provide more immediate provision.

9.3 Increase hockey participation through improved programming - Delivering flexible and affordable hockey programs that re-engage existing members and attract new players will be key to improving participation and supporting the sport's prosperity into the future. Actions include:

- (a) Reviewing the current training and competition schedule of the regional Stead Park facility to ascertain how it may be more widely programmed; and
- (b) Investigating opportunities to host more state and national level events and competitions at Stead Park to increase interest in hockey and contribute to the local economy.

9.4 Embrace new formats that engage new participants - Engaging with more schools and the G21 community through improved and diversified formats including social hockey will support increased participation. Hockey Victoria has an ambitious goal of achieving 15,000 new or re-engaged participants across the state by 2020 and identifies the need to increase its offerings to meet this target. Hockey Victoria will drive this priority with assistance from local clubs and associations. Critical actions under this priority will support the facilitation, activation and delivery of hockey for greater grass roots and social participation;

9.5 Adopt strategies that support the development of sustainable clubs - Support the local hockey association, Geelong Hockey Association, to develop a business plan, in conjunction with the regional strategy, that provides clear organisational and operational directions. In addition, review the structure of hockey and identify preferred management and operational models in anticipation of a new local multi-use pitch at Torquay and the proposed regional development at Armstrong Creek West. Under this priority, Hockey Victoria will also review their affiliation fees to clubs to ensure that the charges are reflective of the level of support provided; and

- 9.6 Promote hockey in the G21 region through collective marketing strategies and initiatives - Promote hockey in the region through collective marketing strategies and initiatives along with increased support from Hockey Victoria through the appointment of a regional club development officer. This critical priority arose from consultation with associations, clubs and players who felt that greater support from Hockey Victoria was required to improve participation outcomes and strategic direction, particularly for the implementation of more non-traditional, unstructured formats of the game.

***Social Equity Considerations***

10. The G21 region is forecast to experience an estimated growth of 670 traditional hockey players from 2011 to 2031. In addition to traditional participation growth, the implementation of diversified hockey formats such as social hockey should see an additional 500 new participants in the short term.
11. At present, all competition is played at the regional hockey facility at Stead Park, Corio. While the facility is of a premier standard, travel time for competitors outside of Geelong is considered a major barrier to participation.
12. The strategy notes that the addition of multi-purpose satellite competition surfaces outside of Greater Geelong should be considered a priority for investment, particularly within Surf Coast Shire. This recommendation will provide greater accessibility for the wider G21 population. The provision of additional satellite competition facilities is supported by Hockey Victoria and the Geelong Hockey Association who operate the Stead Park facility.
13. In addition, the strategy recommends that disadvantaged and low socio-economic communities should be engaged through the implementation of introductory hockey programs with a specific focus on Corio and Norlane. Given the proximity of the Stead Park facility, this presents Hockey Victoria and the Geelong Hockey Association an opportunity to involve members of this community.

***Policy/Legal/Statutory Implications***

14. There is no policy, legal or statutory implications arising from this report.

***Alignment to Council Plan***

15. This report aligns to Council's priorities of 'Improved Health and Safety of Our Community' and 'Informed Social Infrastructure and Planning' as per the Council Plan 2018-22. By consulting with the community and developing a prioritised action plan with key stakeholders, the strategy will provide greater participation opportunities and health outcomes through sport. Furthermore, this plan will support and provide strategic justification through a well-developed evidence base for any future hockey infrastructure within the G21 region.

***Conflict of Interest***

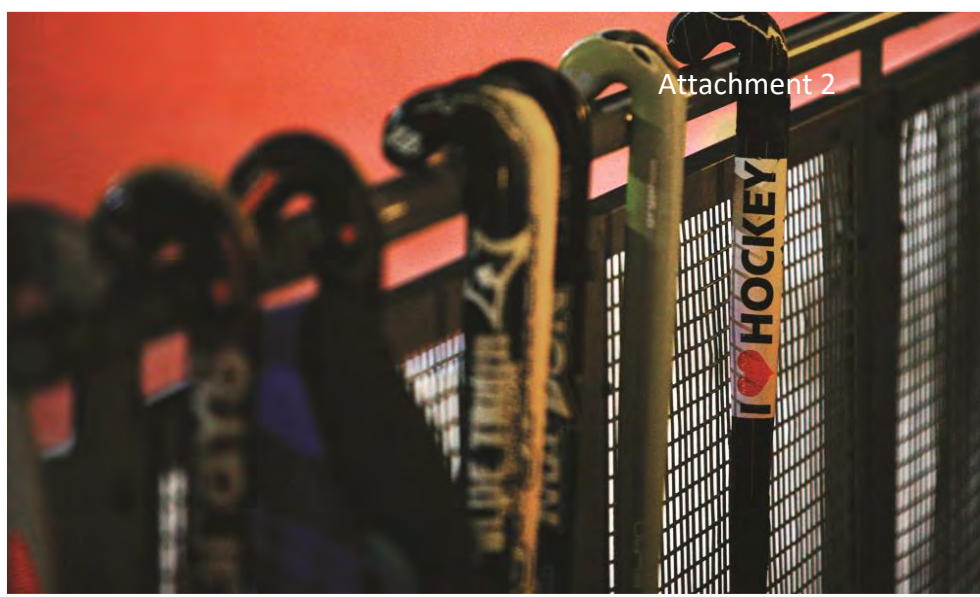
16. No Council officers involved in the preparation of this report or draft strategy are known to have a direct or indirect interest in matters to which this report relates.

***Risk Assessment***

17. There are no notable risks associated with this report.

***Environmental Implications***

18. There are no environmental implications associated with this report.



# G21 REGIONAL HOCKEY STRATEGY

MARCH 2019





## ACKNOWLEDGEMENTS

### PROJECT PARTNERS

**This project has been a collaborative effort of a number of partner organisations, including the Geelong Hockey Association, Hockey Victoria and the five Local Government Authorities comprising the G21 Geelong Region Alliance.**

Input and advice from the Project Control Group, consisting of representatives from the above organisations has also assisted in the development of this document.

### PROJECT CONSULTANTS

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## ABOUT THIS DOCUMENT

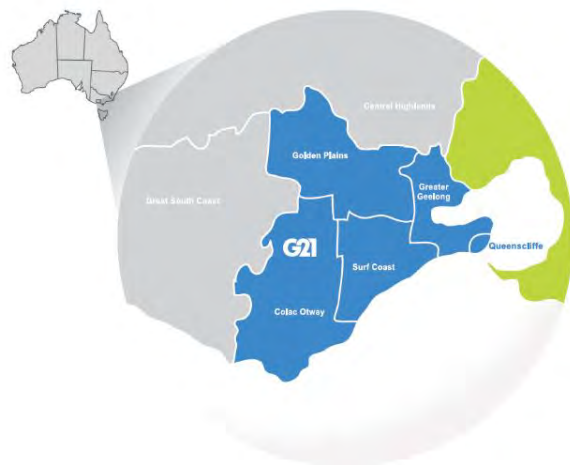
**The G21 Regional Hockey Strategy has been developed to guide the overall direction and development of hockey across the G21 Region for the next 10 years.**

This Strategy provides a detailed assessment of both local and regional hockey needs and focusses on the development of practical strategies that can collectively meet hockey, community and local government objectives.

The project area for the G21 Regional Hockey Strategy is inclusive of the five Local Government areas within the G21 Region - Borough of Queenscliffe, City of Greater Geelong, Colac Otway Shire, Golden Plains Shire and Surf Coast Shire. The G21 Region is located 73km South West of Melbourne CBD. The Region has a diverse mix of urban, coastal, rural and industrial areas in addition to pockets of significant development and population growth.

The G21 Region has a current population of 326,513 and covers 8972 sq. km. The Region's population is the fastest growing in Victoria, outside of Melbourne.

This Strategy investigates the issues and opportunities facing hockey on a regional scale, and draws on knowledge and resources provided by the sport and each of the five representative LGAs of the G21 Region Alliance.



The G21 Regional Hockey Strategy builds on the research, evidence and data provided in the State of Play Report developed in May 2018. Facility inspections, stakeholder consultation and planning work previously undertaken has also informed the development of strategic recommendations. These include:

- Detailed G21 hockey facility condition and compliance audit reporting (2015).
- Hockey Victoria state participation overview meetings (February 2018).
- Strategic directions from the Hockey Victoria Strategic Facilities Master Plan (identified February 2018).
- Key recommendations from the King Lloyd Reserve Master Plan (2010).
- Key recommendations from the Torquay Hockey Club Synthetic Pitch Feasibility Study assessed (February 2018).
- Geelong Hockey Association (GHA) Participant Survey distributed and results analysed (March 2018).
- Department of Education consultation – via relevant G21 schools conducted (March 2018).
- GHA Club Administrator Workshop conducted (April 2018).
- G21 Regional Hockey Strategy Participant Survey Summary Report completed (May 2018).
- Fortnightly Project Control Group (PCG) meetings.

Collation and analysis of the above information has been crucial to the development of the Strategic Framework (outlined on page 31), with key priorities and recommendations identified to guide the development of hockey in the G21 Region to 2028.

# DEFINITIONS AND ABBREVIATIONS

The following definitions and abbreviated terms are used within this document.

| ABBREVIATION                                 | DEFINITION   |
|--|--|
| Strategy                                     | References throughout this document are made to the 'Strategy'. The term 'Strategy' refers to the project as a whole.  |
| LGA  | Local Government Authority.  |
| G21  | <b>G21 Geelong Region Alliance</b> – A formal alliance between the City of Greater Geelong, Shires of Surf Coast, Colac Otway and Golden Plains and Borough of Queenscliffe.   |
| G21 S&R Pillar                               | <b>G21 Sport and Recreation Pillar</b> – The G21 Pillar is focused on improving the capacity of sport and recreation resources and assets across the G21 region.   |
| ABS  | <b>Australian Bureau of Statistics</b> – Statistical report on Children's Participation in Cultural and Leisure Activities, produced by the Australian Bureau of Statistics used to examine trends in football participation and to project future growth and demand.  |
| Forecast.id                                  | <b>Forecast.id</b> delivers population forecasts to councils across Australia and New Zealand, and forecasts how the population, age structure and household types will change between now and the future.   |
| SRV  | Sport and Recreation Victoria.   |
| Regional Hockey Facility                     | In this strategy the term 'Regional Hockey Facility' refers to a facility similar to Stead Park.   |
| Single or purpose built hockey pitch         | In this strategy the term 'single or purpose built hockey pitch' refers to a pitch that is used for hockey only.   |
| Multiuse / multipurpose hockey pitch         | In this strategy the term 'multiuse' or 'multipurpose' hockey pitch refers to a pitch that is being used or will be used for other activities by compatible sports such as soccer, tennis, touch, lacrosse etc. These pitches are generally multi-lined but can still host competition games and events/tournaments. |
| Local club venue                             | In this strategy the term 'local club venue' refers to existing venues where local clubs are based or are using for training purposes.   |
| Satellite / training / non competition venue | In this strategy the term 'satellite / training / non competition venue' refers to all hockey facilities other than Stead Park that are only being used for training purposes. These are generally smaller pitches that are not to competition standard.   |
| Competition venue                            | In this strategy the term 'competition venue' refers to full size pitches that are being used for competition purposes i.e. Stead Park.  |

# EXECUTIVE SUMMARY

Hockey is a popular sport in Victoria with 21,913 players (19,273 playing members and 2,640 Hookin2hockey players). In the G21 Region the Geelong Hockey Association (GHA) is responsible for the delivery and development of the sport and its 1,131 registered participants.

There are nine local hockey clubs affiliated with the GHA, including three clubs that have formed in the past five years - Torquay Hockey Club, Hockey Bellarine and the Golden Plains Hockey Club. Despite the addition of these new clubs, registered hockey participation numbers have declined by 318 players in the past three years.

There are currently 5 hockey pitches within the G21 Region, of which three are located on Council land and two on school land. Whilst the provision of pitches meets the required pitch to population ratio of 1 :100,000, a number of key constraints prevent more people from participating, these include:

- Travel time to venues – whilst the regional facility at Stead Park, Corio services current demand well, it is the only competition venue in the region and travel presents a barrier to participation.
- Facility capacity – a number of existing hockey pitches are the non-preferred grass surface without floodlighting.
- Access – limited access is available to hockey clubs at venues located on education land.

To address the decline in player numbers the sport and its stakeholders, including LGAs and schools, must work together to address these barriers, along with delivering more flexible and non-structured programs to enable and support future growth.

Evidence collected via local and regional stakeholder groups has provided further support for the strategic direction of hockey across G21. Groups surveyed as part of the Strategy's development identified a range of priorities and opportunities for hockey.

Upgrades to existing or the development of new facilities should be guided by the principle of shared use. Based upon this principle, the development of multi-purpose facilities for use by hockey will support a range of participation outcomes including non-structured and competition formats.

As a key growth area, planning for hockey within the G21 Region is critical to ensuring the prosperity of the sport into the future.

Achieving the vision of **building a strong, inclusive and sustainable hockey community in the G21 Region** will require support and implementation of the following key focus areas.

**PARTICIPATION** – increasing participation through ongoing facility development and delivery of flexible and innovative programming opportunities.

**FACILITY ACCESS** – increasing the capacity of and access to existing club facilities and reducing the travel time for players.

**SPORT DEVELOPMENT** – providing resources that assist in the efficient and effective management and governance of the sport and securing a sustainable hockey footprint in the Region.

Six strategic priority areas have been identified to guide the future development of hockey in the G21 Region over the next 10 years. Specific recommendations under each strategy are provided later in this report.

|                             |  |
|-----------------------------|--|
| <b>STRATEGIC PRIORITY 1</b> | <b>Provide functional and accessible hockey facilities.</b>                                    |
| <b>STRATEGIC PRIORITY 2</b> | <b>Increase capacity of existing facilities and deliver new pitches to meet future demand.</b> |
| <b>STRATEGIC PRIORITY 3</b> | <b>Increase hockey participation through improved programming.</b>                             |
| <b>STRATEGIC PRIORITY 4</b> | <b>Embrace new formats that engage new participants.</b>                                       |
| <b>STRATEGIC PRIORITY 5</b> | <b>Adopt strategies that support the development of sustainable clubs.</b>                     |
| <b>STRATEGIC PRIORITY 6</b> | <b>Promote hockey in the Region through collective marketing strategies and initiatives.</b>   |

### 1. Functional and accessible hockey facilities

Plan and deliver functional and accessible hockey facilities that meet the current and future needs of the sport. This includes upgrades to existing and development of new hockey facilities that provide a suite of satellite and competition standard venues.

### 2. Increase the capacity of existing facilities and deliver new pitches to meet future demand

Prioritising floodlighting projects and delivering new competition standard pitches will service the needs of the sport in line with the regions population growth.

### 3. Increase participation through improved programming

Delivering flexible and affordable hockey programs that engage existing members and attract new players will be key to reversing the current downturn in participation.

### 4. Embrace new formats and engage new participants

Hockey in the Region must embrace Hockey Victoria's new social hockey programs (Hockey Sixers, J-Ball and KE40) to attract new people to the game and continue to deliver School Roadshow in local schools.

Hockey Victoria's Strategic Plan 2017-2020 outlines the vision to diversify hockey participation opportunities to encompass new modified social hockey formats.

To reach its ambitious goal of 15,000 new or re-engaged participants by 2020, Hockey Victoria have been introducing the new social hockey formats across Victoria, both regionally and in metropolitan Melbourne. The new formats are designed so they can be delivered on both full-size hockey pitches and training pitches, reducing the travel related barriers.

More specific to the G21 region, Hockey Victoria have partnered up with Geelong Hockey Association and Surf Coast Shire to deliver J-Ball and Hockey Sixers at Stead Park and in Torquay in 2018 and 2019. It is anticipated that these new opportunities will attract additional 500 participants by the end of 2019 in the G21 region. Over the next 2-3 years, Hockey Victoria plans to introduce social hockey across each LGA in the G21 region, increasing hockey participation opportunities.

### 5. Implement strategies that support the development of sustainable clubs

Providing support to the GHA and affiliated clubs through the delivery of strategic planning and improved resources will ensure a sustainable hockey footprint in the G21 Region.

### 6. Promote hockey through collective marketing strategies and initiatives

Increasing the profile of hockey in the Region through innovative marketing strategies and the recruitment of a dedicated Hockey Victoria resource.



# PROJECT CONTEXT

## PROJECT METHODOLOGY

This Strategy has been delivered in five key stages and is due to be finalised and adopted by project partners by March 2019. The following diagram outlines project timelines and associated key tasks to be delivered during each stage.

### STAGE ONE

#### Project Establishment January 2018

Project commencement, agreed project plan, timeframes and communications plan.

### STAGE TWO

#### Situation and Supply Analysis February – March 2018

Literature review, demographic and participation analysis, facility mapping, audit data review and stakeholder consultation.

### STAGE THREE

#### Vision, Principles and Framework March – April 2018

Governance and management benchmarking, Key Findings Report, Draft Strategy framework and vision developed.

### STAGE FOUR

#### Strategy Development June - December 2018

Facility distribution and gap analysis, Draft Strategy development, prioritised regional and municipal action plans formulated and public exhibition of Draft Strategy.

### STAGE FIVE

#### Final Strategy and Summary Document December 2018 – March 2019

Final G21 Regional Hockey Strategy developed and endorsed by stakeholders.

## PROJECT PARTNERS AND CONTRIBUTIONS

The G21 Regional Hockey Strategy has been jointly funded by the five G21 Councils and Hockey Victoria. The Hockey Victoria funding included a 50% contribution by Hockey Geelong. G21 acknowledges that the contribution by Hockey Geelong was on behalf of the nine affiliated hockey clubs, noting that the Torquay Tornados Hockey Club provided an additional contribution.

The Torquay Tornados Hockey Club have confirmed that they have no expectation regarding recommendations within the Strategy, and will not receive any recognition of their contribution.

## PROJECT OUTCOMES

The following project outcomes will be delivered through the Final G21 Regional Hockey Strategy:

- Identification of infrastructure and sports development requirements highlighting participation, governance, resourcing and partnership needs.
- Clear direction and timelines regarding stakeholder responsibilities to collectively deliver initiatives to support the future growth of hockey within the Region.
- Analysis of key demographic and participation trends to guide Regional priority recommendations and the implementation plan.
- Alignment of current and future participation needs with previously conducted research and reporting to deliver a clear plan for the future.
- Detailed facility analysis and venue mapping to determine participant facility access arrangement and travel times.
- Identification of gaps and opportunities within the current hierarchy of facilities and infrastructure.

# STRATEGIC DRIVERS AND CONTEXT

## Hockey Victoria Facilities Master Plan (2014)

Although the G21 geographical region does not perfectly align with the Hockey Victoria West Metropolitan Zone, all G21 Clubs sit within this Zone, and are therefore classified as metropolitan clubs.

The Hockey Victoria Facilities Master Plan identified two key priorities for the development of hockey within the G21 Region:

- Development of a new synthetic pitch in Torquay.
- Facilitation of greater access to pitches at Geelong Grammar and Geelong College schools.

As a result of the above recommendations, Geelong College is utilised on an ongoing basis by two local hockey clubs (Geelong College Hockey Club and Geelong Hockey Club). The synthetic multi-purpose pitch at Geelong Grammar school is utilised by the GHA as an overflow pitch for training and junior competition purposes.

The recommendation for the development of a synthetic pitch in Torquay outlined in the Master Plan triggered the Surf Coast Council to commission the Feasibility Study (2015) to determine the viability of the development of a new pitch within the municipality.

## City of Greater Geelong (CoGG) Draft Settlement Strategy (2018)

The Draft Settlement Strategy projected the overall population of the CoGG to reach 390,000 by 2036. A large proportion of this growth will be experienced in the Armstrong Creek, and Northern and Western Geelong growth areas. These three planning areas will collectively contribute an additional 110,000 residents.

The Plan outlines the following demographic and development priorities:

- Stage 1 – Armstrong Creek - Marshall - Charlemont development will include recreation and open space provision (with a proposed multi-use regional synthetic hockey facility planned for Armstrong Creek West).
- CoGG advised that the Armstrong Creek West Regional Sports Precinct will be triggered when development (dwellings) reach 3,000.
- Regarding hockey specific provision, CoGG cited the current HV recommended pitch to population provision ratio (1:100,000) is exceeded by its existing five pitches. The immediate focus for CoGG has been noted as building the capacity and improving the quality of existing venues.

## Hockey Victoria (HV) Player and Stakeholder Research (2018)

Research conducted by La Trobe University for Hockey Victoria to understand statewide participation trends determined the following:

- 95% of participants indicated that they would be playing hockey in 12 months time.
- 86% indicated that they would still be participating in 3 years time.
- The average age of a Victorian hockey player is 38 years.
- Hockey in Victoria has a relatively even male to female participation rate of 54% to 46% respectively.
- 59% of active, current players have another family members playing the game.

Regarding HV's development and expansion of social and unstructured forms of the game such as J-Ball, Hockey Sixers and KE40, the study highlighted the following:

- 86% of active, current players indicated they would be interested in participating in a new format of hockey.
- 77% of inactive former hockey players indicated that they would be interested in playing a new format of hockey, should it be available.

## King Lloyd Reserve Master Plan (2010)

King Lloyd Reserve is situated approximately three kilometres southwest of the Geelong Central Activities Area.

The reserve is approximately 6.3 hectares in size and whilst a large portion of the reserve has been formed into sports fields, there are expansive conservation zones along its eastern and south-eastern edges which have been re-vegetated to support broader environmental management objectives for the area.

King Lloyd Reserve is currently tenanted by the:

- Newtown City Hockey Club
- Murgheboluc Cricket Club
- Geelong Touch Football Association.

The aim of the Master Plan is to develop a plan that can be used to guide the future development of the reserve having regard to user and community aspirations, whilst enhancing the natural ambience and character of the park.

The key strategic directions proposed in the King Lloyd Reserve Master Plan were to:

1. Improve the overall landscape amenity and quality of the reserve by planting additional trees within the reserve and along its edges, and by corralling vehicles to defined roads and car parks. (Ongoing).
2. Convert the surface of the sports fields to warm season grasses to create a more sustainable and durable playing surface in summer, and assess the condition and efficiency of the existing automated irrigation system in the main sports field. (Done.)
3. Install a new turf table onto the main sports field. Remove the existing cricket practice nets and construct a new set of practice nets (comprising three concrete wickets with permanent netting and four turf practice wickets with temporary netting) in a location to be determined pending the availability of the land north of the reserve. (3 synthetic and 2 turf provided).
4. Install a shelter and store on the second sports field. (Not started).
5. Seal Windsor Road and install speed humps (or similar) to slow traffic, and remove car parking from around the playground to improve the safety of the entry area. (Not started).
6. Reconfigure and expand the main car park to increase the number of spaces (to 104 spaces), and form a new unsealed access road to the lower sports field and provide car parking for 15 cars. (Not started).

The Master Plan also states that the development of a new synthetic hockey facility and parkland 'was beyond the scope of this master planning study to confirm, or otherwise, the need for a synthetic hockey field for the Newtown City Hockey Club at this location, or any other location in the region.

As previously suggested, a detailed investigation into the future development of hockey in the Greater Geelong region should be undertaken before any firm commitment is made to providing a synthetic hockey facility at King Lloyd Reserve.

The aim of preparing Option 2 during this study was to show how the land north of the reserve could accommodate a new synthetic hockey field, and the associated additional infrastructure)."

### **Torquay Hockey Club Synthetic Pitch Feasibility Study (2015)**

Commissioned by Surf Coast Shire, the Feasibility Study investigated the potential for the development of a floodlit pitch in Torquay and explored the existing offering of facility provision within the Region, along with participation trends and current and future needs of the club.

The following findings were delivered in the report:

- A need for an additional synthetic hockey pitch to be developed within the G21 Region in the next 5-10 years. However, demand for a synthetic multi-purpose pitch within Torquay to service the Surf Coast Shire and neighbouring Armstrong Creek could be justified within the next 3-5 years, pending continued population growth.
- Travel times to Geelong for regular training and matches creates barriers to local hockey growth within Torquay.
- Site specific investigations into potential site options for a synthetic pitch development in Torquay were conducted, with Surf Coast Secondary College being the most viable due to key partnership opportunities, location, land availability, site capacity and existing community infrastructure.
- The estimated cost for a new pitch and floodlighting at the Surf Coast Secondary College was estimated to be approximately \$1.5 - \$1.8 million.

# REGIONAL AND LOCAL HOCKEY ISSUES

**Sport, government and community stakeholders were engaged via workshop and survey to identify the key issues, constraints and opportunities influencing the planning, provision and growth of hockey in the G21 region.**

This section of the report details the key issues and challenges facing hockey in the Region and what the sport and G21 LGAs will need to focus on to ensure hockey is well supported in the future.

The issues and challenges outlined below are both asset based and sports development related, and have informed both the strategic framework and local and regional recommendations.

## **Building the capacity of existing facilities**

With the exception of a pitch in Torquay, the number of existing hockey pitches in the G21 region is considered adequate for the current number of players. However, the number of synthetic pitches and the infrastructure and amenities offered at these facilities is not meeting the needs of the sport, now and into the future.

Consultation with local hockey clubs identified strong support and evidence for the need to invest in the upgrade of existing hockey facilities. The key facility issues raised by clubs were a lack of suitable pitch provision (including undersized and grass pitches) and an absence of supporting infrastructure to meet the minimum standards of the sport.

A summary of existing facility issues is provided below.

### **Stead Park**

- Operating at near of full capacity and provides limited opportunity for any additional programming.

### **King Lloyd Reserve**

- As there is currently no synthetic surfaces appropriate for competition, any provision of floodlighting on the turf field would primarily support training at a lower level only. As per the King Lloyd Reserve Master Plan, the provision of a synthetic pitch is identified as a future opportunity to increase hockey participation. The provision of dedicated floodlighting for hockey should be incorporated into the synthetic pitch development in accordance with the Master Plan.

### **Geelong College**

- Multi-purpose pitch with limited availability for hockey due to regular use by other school sports.
- Lack of floodlighting restricts use for hockey, limited car parking and noise issues for residents.

### **St Ignatius College**

- Undersized (3/4) pitch restricts competition play.
- The lack of floodlighting limits venue capacity.
- No changeroom amenities.

### **Geelong Grammar**

- Multi-purpose pitch with limited availability for hockey due to use by other school sports.

## **Travel a significant barrier to participation**

With fewer hockey pitches within reach of the general population compared to football ovals or basketball courts, there is a general acceptance of the need to travel to play hockey. However, the constant demand on time poor parents to drive their children significant distances to play hockey is seen as a major issue to growing the game in the Region.

The G21 region has a land area of approximately 9,000 square kilometres and local hockey players are currently travelling an average of 30 minutes to participate. Just over a quarter of respondents (26%) to the online survey are travelling less than 20 minutes (return trip) to access their local hockey facility, with 21% travelling 31-40 minutes, 20% travelling 41-60 minutes and 14% traveling between 1-1.5 hours. In addition, 73 surveyed respondents highlighted the need for additional competition pitches to minimise travel time.

Increasing the capacity of existing pitches to make them more training and competition friendly, and strategically locating any new pitches will help to address these issues.

## **Gaps in existing hockey provision in G21**

This Strategy supports the priority recommendations for hockey identified in Hockey Victoria's Facilities Master Plan 2014 - development of a new synthetic pitch in Torquay and greater access to Geelong Grammar and Geelong College pitches.

With a membership base of approximately 200 the Torquay Hockey Club have no dedicated facility and currently use Stead Park for competition purposes, and a grass oval at the Torquay Sports Precinct for training.

In 2015 a local report on the feasibility of developing a full size synthetic hockey pitch in Torquay identified demand for a synthetic multi-purpose pitch pending continued population growth. The Feasibility Study also identified travel to central Geelong pitches for regular training and match play as a key barrier to local hockey growth within Torquay.

## **Increase the profile and make it more affordable**

Greater marketing and promotion for hockey within the Region and reducing the cost to participate are seen as critical issues working against participation growth. Addressing these constraints through the implementation of this Strategy will be a high priority for the sport.

# CONSULTATION ANALYSIS AND KEY DRIVERS

To guide the development of the G21 Regional Hockey Strategy, a detailed stakeholder consultation program was undertaken. A summary of key themes and findings from the consultation are outlined below. These themes form the basis of future directions and together with the data analysis and research inform the key drivers for strategic planning.

The following stakeholder consultation activities were undertaken:

- Meetings with the Project Control Group (ongoing).
- Online Hockey Participant Survey (244 responses received). Summary of responses provided in Appendix 2.
- Club Representative Workshop.
- Hockey Victoria future directions meetings (March).
- Geelong Hockey Association consultation (ongoing).

## FACILITY ACCESS

- Lack of accessible facilities within a reasonable distance (30 minutes drive one way) is a key barrier to participation.
- Support for additional facilities in key growth areas of Armstrong Creek (regional) and Torquay (local), and opportunity to develop facilities at King Lloyd Reserve.
- Support for additional satellite facilities to address current training facility access issues and reduce drive time.
- Developing partnerships with educational stakeholders to increase facility access.

## EXISTING FACILITY CONDITION

- Increase the standard of existing facilities to meet the current and future needs of clubs and participants.
- Lack of suitable pitch provision (full-sized / synthetic).
- Lack of suitable, localised supporting infrastructure to meet the minimum standards of the sport.
- Investment in facility upgrades through stakeholder partnerships.

## ENGAGEMENT & PARTICIPATION

- Improve existing GHA and club marketing strategies to engage new participants.
- Utilisation of social media platforms to increase the profile of hockey within the Region.
- Increasing the programming offering, with a particular focus on social hockey formats.
- Development of pathways to retain players and support the transition between junior and senior competition.

## FINANCIAL CONSTRAINTS AND SUSTAINABILITY

- Current fees and charges have raised affordability issues for clubs and are not sustainable long term.
- The need to develop partnerships with local government, Hockey Victoria and Sport and Recreation Victoria to further initiatives for making hockey more affordable for participants.
- Implementation of a Club Development Officer to support ongoing club development, administration and marketing processes.





**POPULATION GROWTH DRIVING DEMAND**

# G21 POPULATION PROJECTIONS

## G21 Regional growth

The G21 Region is the fastest growing region in Victoria outside of Melbourne's metropolitan area.

The principal population centre of the Region is located in Geelong, however significant growth is expected throughout other municipalities of the G21 Region over the next 10 years.

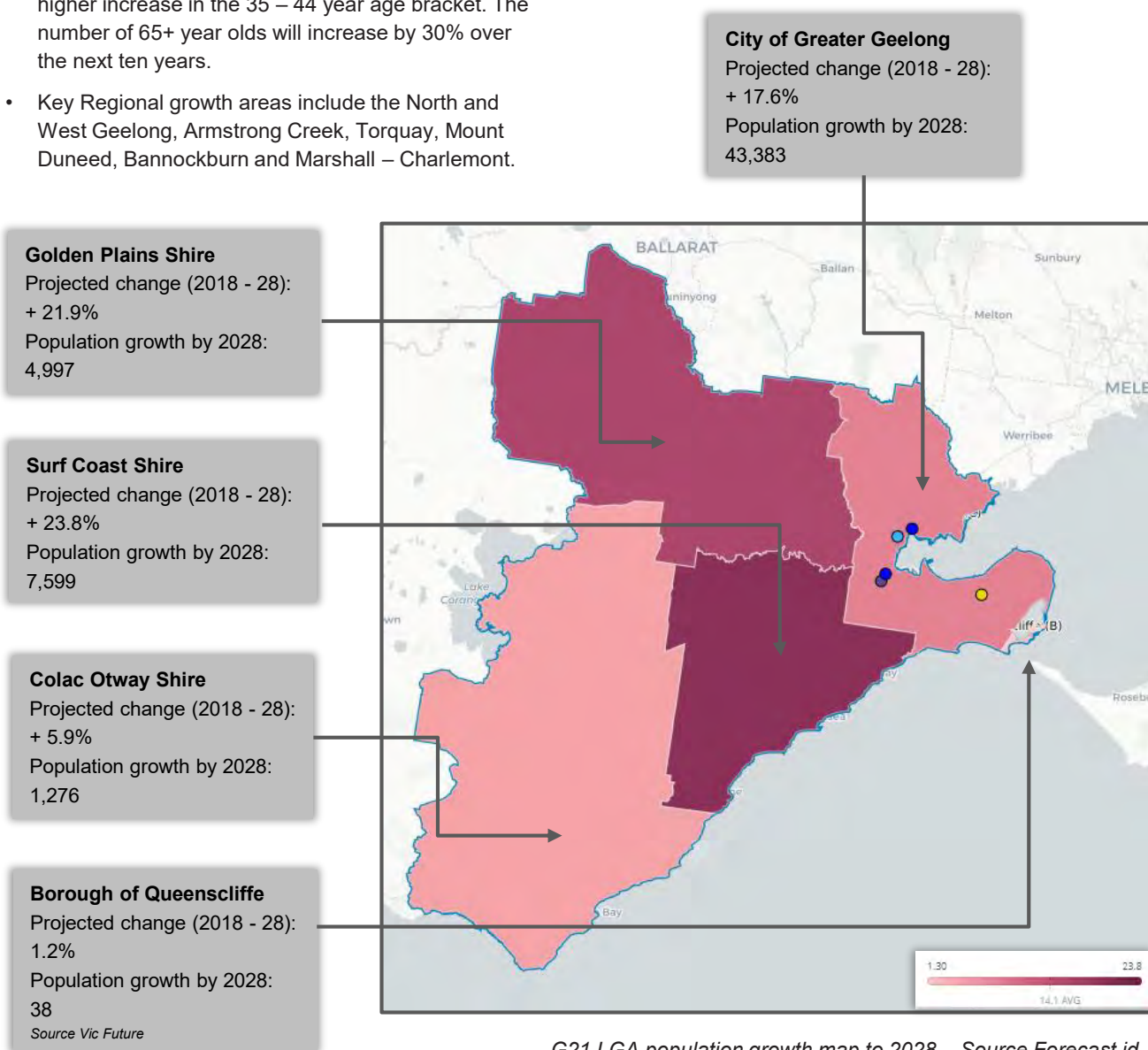
Key population projections for the G21 Region have been sourced from Forecast.id and include:

- The G21 Region currently has a population of 326,513 with a total population of approximately 383,805 expected by 2028 (+57,292 residents).
- Relatively even population growth is expected across the 0 – 64 year age cohorts, with a slightly higher increase in the 35 – 44 year age bracket. The number of 65+ year olds will increase by 30% over the next ten years.
- Key Regional growth areas include the North and West Geelong, Armstrong Creek, Torquay, Mount Duneed, Bannockburn and Marshall – Charlemont.

## Demographic change

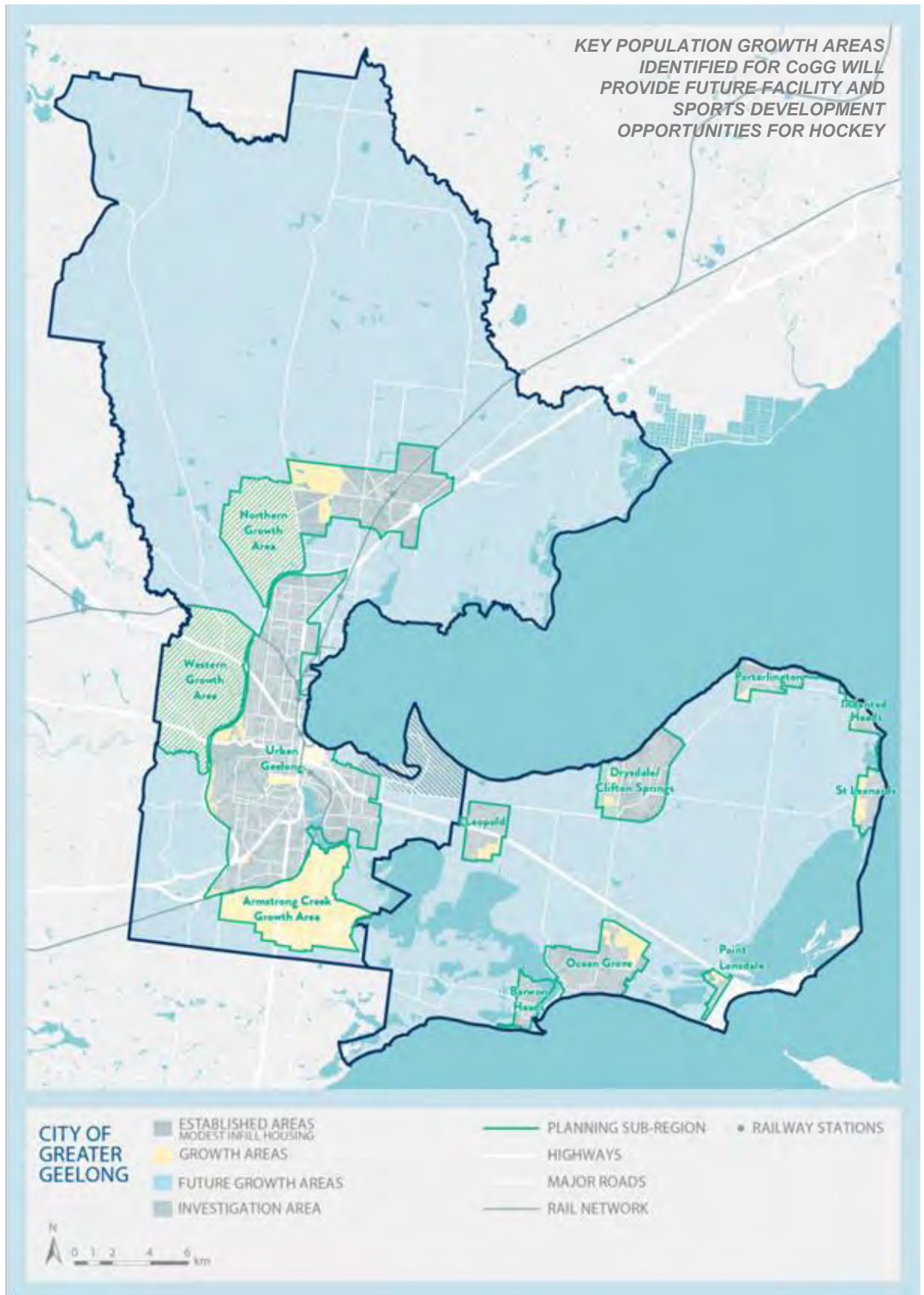
The demand for hockey and the way it is delivered will continue to change as the population of the G21 Region grows. The way in which Australians are consuming sport is evolving, with a shift toward more social and unstructured forms of play, over traditional competition formats. Planning and improving future hockey provision to ensure accessible casual access to hockey facilities will be a key factor to increasing participation in the Region.

The map below outlines predicted growth to 2028 for each of the five G21 LGA's.



G21 LGA population growth map to 2028 – Source Forecast.id

# CoGG GROWTH AREAS



# LOCALISED GROWTH

A brief overview of the G21 Region collectively and of each municipality individually is provided below. These summaries highlight key population and demographic growth over the next 10 years (to 2028) and demographics relevant to hockey within the G21 Region.

## City of Greater Geelong (CoGG)

- The principal population centre of the G21 Region.
- Greatest growth (established suburbs) include:
  - Armstrong Creek +10,817 residents (+167%).
  - Mount Duneed +4,209 residents (232%).
  - Marshall - Charlemont +3,583 residents (125%).
- The Northern Geelong growth area, in Lovely Banks, is anticipated to deliver up to 18,000 new dwellings for a population of approximately 50,000 residents.
- The Western Geelong Growth Area, in Batesford, is anticipated to deliver up to 22,000 new dwellings for a population of approximately 60,000 residents.
- Greatest resident population increases expected in the 35 - 44 and the 75 - 84 age cohorts.

## Surf Coast Shire (SCS)

- Torquay (including Torquay, Torquay North, Old Torquay and Torquay West) is one of the highest growth areas in the G21 Region with an additional 7,599 residents expected by 2028.
- Of this growth, the greatest age cohort increases are expected in the 70 - 84 year age bracket.

## Golden Plains Shire (GPS)

- Bannockburn will experience the greatest population growth in the Golden Plains Shire to 2028, with an additional +2,300 residents (+41%).
- Relatively even growth across all age cohorts.

## Colac Otway Shire (COS)

- The population within the Colac Otway Shire will increase by 1,276 to 22,924 in 2028. Colac West and Elliminyt will experience the most growth.

- The greatest growth will be experienced in the 10 - 14 year age bracket.
- Decreases are expected in the 20 - 29 and 55 - 64 age cohorts.

## Borough of Queenscliffe (BoQ)

- The Borough of Queenscliffe's future population forecast suggests minimal growth between 2018 and 2028 (+38 residents).

## Regional trends and observations

- Greater Geelong is the largest of Victoria's regional hubs, all of which are experiencing increasing population growth and urbanisation. This provides strong support for the development of a regional hockey facility within the proposed Armstrong Creek West Regional Sports Precinct.
- 76% of the Region's population reside within the CoGG. In 2028, CoGG is expected to still contribute this percentage of the total Regional population.
- Despite having a high percentage of older adult population, significant population growth is forecast in the age cohorts of 5-14 years and 35-44 year, suggesting younger families (and potential hockey participants) will move to new development areas such as Armstrong Creek.
- As per the table below, the total number of additional competition hockey participants expected across the Region by 2028 is +200, if the current player to population rate (penetration) of 0.35% is applied.
- In addition to the growth in competition hockey numbers, the implementation of social hockey within the region should see approximately 500 new people playing one of the new social hockey formats by the end of 2019.

| LGA                     | 2018 population | 2028 forecast population | Change (#)    | Change (%)  | Potential growth in hockey participants between 2018 and 2028 (if applying individual LGA 2018 player penetration rate) |
|-------------------------|-----------------|--------------------------|---------------|-------------|---|
| City of Greater Geelong | 247,068         | 290,450                  | +43,383       | +17.6%      | +152  |
| Surf Coast Shire        | 31,937          | 39,536                   | +7,599        | +28.9%      | +27   |
| Golden Plains Shire     | 22,859          | 27,856                   | +4,997        | +21.9%      | +17   |
| Colac Otway Shire       | 21,648          | 22,924                   | +1,276        | +5.9%       | + 4   |
| Borough of Queenscliffe | 3,001           | 3,039                    | 38            | +1.2%       | +0  |
| <b>Total</b>            | <b>326,513</b>  | <b>383,805</b>           | <b>57,293</b> | <b>+76%</b> | <b>+ 200 (total competition players – 1,331 in 2028)</b>  |

Future population and potential competition player growth by LGA (does not include social players).



**STATE OF PLAY - HOCKEY IN THE G21 REGION**

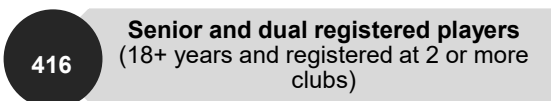
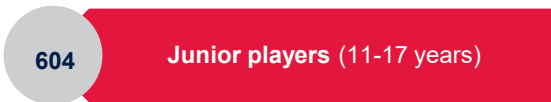
# SUMMARY OF HOCKEY IN G21

## G21 HOCKEY PROVISION

The following analysis provides a summary of existing provision and participation trends across the G21 Region from 2015 – 2017.

Participation numbers are based on Hockey Victoria's affiliate member database and reference to the State of Play Report (refer Appendix 1).

- 5 G21 hockey venues
- 3 Shared school facilities
- 5 Synthetic grass pitches
- 2 Natural grass pitches



1,131  
Total number of G21 participants  
(-318 from 2015)



0.35% penetration rate  
(G21 Region population divided by number of players)



1 in every 289  
G21 residents play hockey



45% female  
55% male  
Participants



Average G21 hockey player age is 20 years



63% of participants are under 18 years of age



# CURRENT FACILITY PROVISION

All five G21 hockey facilities (7 pitches) are located centrally in the Region, within the City of Greater Geelong. Maps of the location of each facility in the context of the Regional and the City of Greater Geelong are provided on the following page.

The Geelong Hockey Association (GHA) is the governing and administrative body for hockey within the G21 Region and utilise the seven pitches across the five venues identified below. Nine local clubs occupy these facilities, with six utilising Stead Park as their home competition venue.

### Stead Park - Corio

2 hybrid synthetic grass pitches  
Home clubs: Corio HC, Golden Plains HC, Hockey Geelong, Kardinia HC, Saints HC and Torquay HC  
Lighting provided (500 lux)

### King Lloyd Reserve - Newtown

2 natural grass pitches  
Home club: Newtown HC  
No lighting provision  
(funding to install training standard lighting is imminent)

### Geelong College - Newtown

1 synthetic grass pitch  
Home clubs: Geelong College HC and Geelong HC  
No lighting provision

### St Ignatius College - Drysdale

1 sand based synthetic grass pitch  
Home club: Bellarine HC  
No lighting provision

### Geelong Grammar - Corio

1 synthetic grass pitch  
Training / overflow venue  
No home club  
Lighting provided (lux level unknown)

**At present, the current hockey facility offering within the G21 Region exceeds industry benchmarking for the current population, as identified in the table below.**

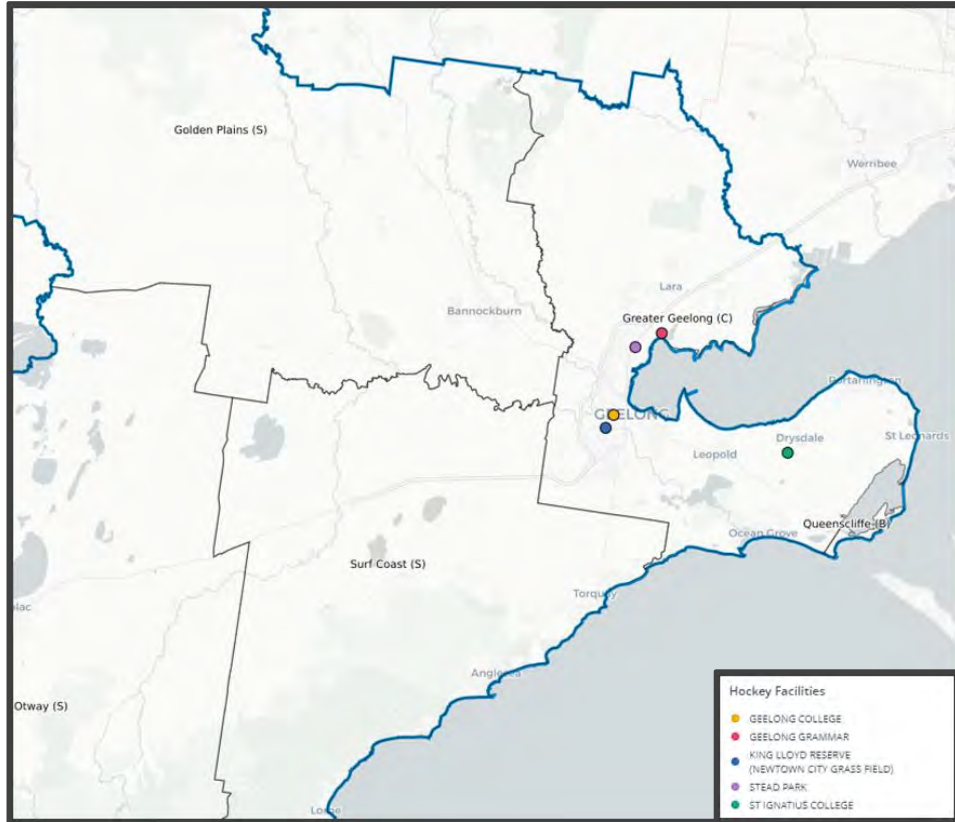
City of Greater Geelong hockey synthetic pitch planning benchmarks are also well catered for (currently outlined as 1:100,000 per head of population - in accordance with Hockey Victoria provision guidelines).

|  |                   |
|--|-------------------|
| <b>G21 Region pitch to population provision ratio</b>                      | <b>1 : 46,635</b> |
| <b>City of Greater Geelong average pitch to population provision ratio</b> | <b>1: 35,295</b>  |
| <b>Surf Coast Shire average pitch to population provision ratio</b>        | <b>0: 31,937</b>  |
| <b>Golden Plains Shire average pitch to population provision ratio</b>     | <b>0: 22,859</b>  |
| <b>Colac Otway Shire average pitch to population provision ratio</b>       | <b>0: 21,648</b>  |
| <b>Borough of Queenscliffe average pitch to population provision ratio</b> | <b>0: 2,934</b>   |

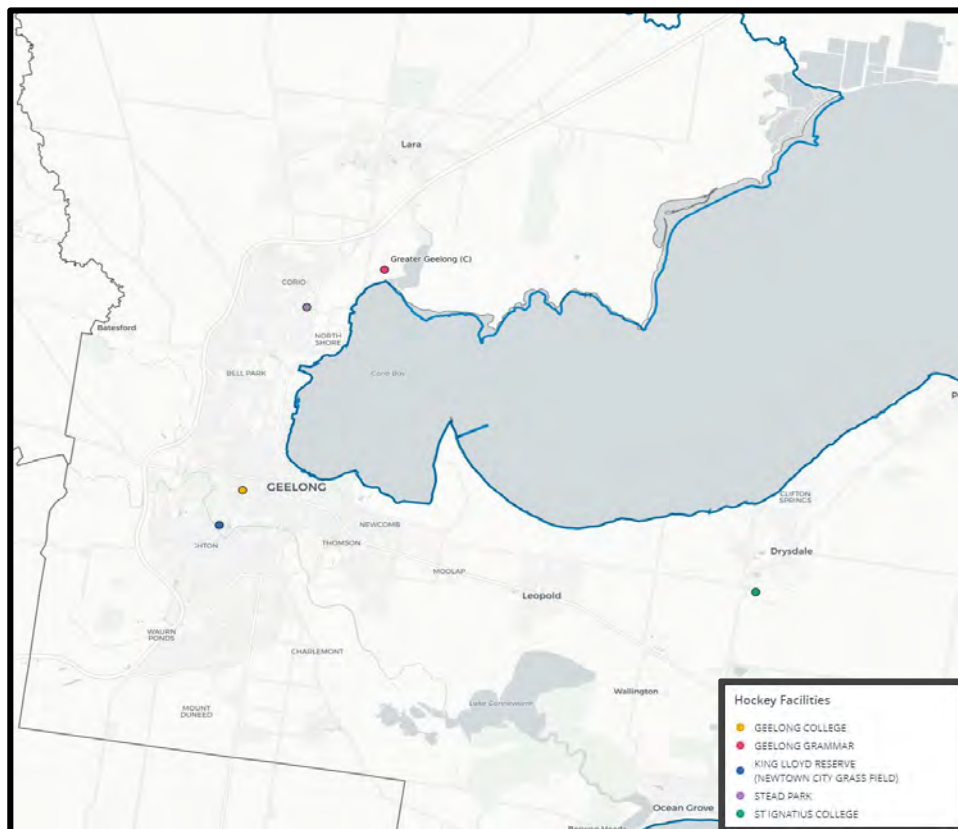
*If no further hockey pitches are developed in the G21 Region to 2028, the forecast pitch to population ratio will be 1: 76,765 - which is within Hockey Victoria's recommended pitch to population guideline of 1:100,000.*

*Ratios should be used as a guide only as there are many other local demographic, facility quality, venue access, frequency of use and service driven demands that are not taken into account. Also for hockey, there are differences between metro and regional facilities when considering factors such as population, player catchment, travel and use.*

# MAPS OF CURRENT FACILITIES



Map of current hockey facilities within the context of the G21 Region.



All current hockey facilities are located within the City of Greater Geelong.

# PARTICIPATION TRENDS

The table below provides an overview of GHA club players for three years (2015 - 2017) and provides the following participation trends over that period.

- Overall, hockey player numbers in the G21 region has experienced a decline of 274 participants (-16.7%) from 2015 to 2017.
- Hockey Geelong representative teams have also declined since 2015 (-280 participants). GHA attributes this to a number of local challenges facing the sport, such as lack of available time and ease of facility access.
- It is further noted by GHA that in recent years participants have chosen to only participate in local competitions.
- Eight of the nine GHA clubs experienced a decline over the three year period (88.9% of clubs).
- Hockey Victoria advised that state-wide approximately 25% of members stop playing each year, but they also gain another 25% each year.
- Corio Hockey Club's significant decline in players is attributed to their ability to field only one GHA team in the 2017 season, highlighting the need for the implementation of sustainable club initiatives.
- The only club to increase their player numbers over the period was the Torquay Hockey Club (+23), despite not currently having a local training base. At present, the Club train on a shared use grass football oval and travel to Stead Park (approximately 30 minutes one way by car) for training and competition purposes.
- Six out of the nine clubs experienced a participation incline or decline of 20 players or less over the three year period.
- Several clubs indicated via the online survey that the current condition of their home facility is directly impacting the opportunity for future player growth.

| Club                        | 2015        | 2016        | 2017        | Plus / Minus (#) | Plus / Minus (%) |
|-----------------------------|-------------|-------------|-------------|------------------|------------------|
| Corio Hockey Club           | 53          | 50          | 7           | -46              | -86.8%           |
| Geelong College Hockey Club | 83          | 64          | 68          | -15              | -18.1%           |
| Geelong Hockey Club         | 142         | 152         | 129         | -13              | -9.2%            |
| Golden Plains Hockey Club   | 80          | 70          | 75          | -5               | -6.3%            |
| Hockey Bellarine            | 122         | 186         | 120         | -2               | -1.6%            |
| Kardinia Hockey Club        | 82          | 82          | 74          | -8               | -9.8%            |
| Newtown City Hockey Club    | 323         | 380         | 294         | -29              | -9.0%            |
| Saints Hockey Club          | 115         | 160         | 72          | -43              | -37.4%           |
| Torquay Hockey Club         | 173         | 225         | 196         | 23               | 13.3%            |
| Hockey Geelong (Rep teams)  | 276         | 278         | 96          | -180             | -65.2%           |
| <b>Total</b>                | <b>1449</b> | <b>1647</b> | <b>1131</b> | <b>-318</b>      | <b>-21.9%</b>    |

*Hockey player numbers by club – 2015 to 2017*

*Note – The data accounts for player numbers only, and does not include secondary participation in hockey by club officials, spectators and social members*

# KEY AREAS FOR HOCKEY PARTICIPATION

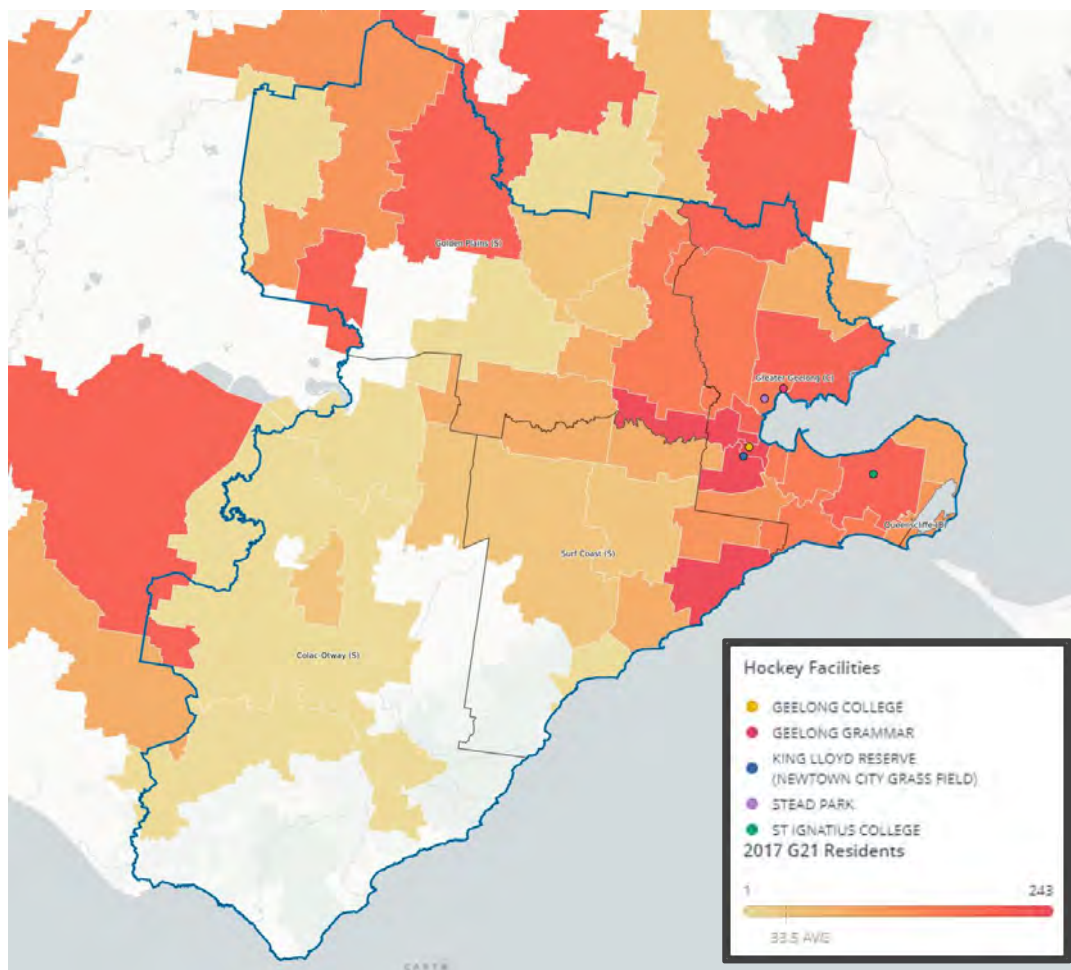
The map below provides a visual representation of current hockey players living (by post code) and playing (by home club) within the Region. The heavy red colour indicates the highest areas of hockey players. Key participation hot spots by post code for hockey in the region include:

- **3216 - Waurm Ponds, Grovedale, Highton, Marshall, Wandana Heights and Belmont (242 players)**
- **3228 - Torquay, Bellbrae, Jan Juc and Bells Beach (154 players)**
- **3220 - Geelong, South Geelong, Newtown (148 players)**

Players living in Central Geelong have convenient access to Stead Park where all senior competition hockey in the G21 Region is currently played. These players are generally within an acceptable distance of 20 minutes or approximately 20kms (one way trip) of their facility.

Players living within postcode 3228 (Torquay and surrounds) are required to travel almost 30 minutes (30km) one way to access Stead Park. The distance to reach the second most accessible facility, St Ignatius College is approximately the same however presents even greater access issues.

G21 postcodes to the north (3351 and 3352) also have a reasonably high number of hockey participation, however these encompass multiple suburbs and townships that filter outside the G21 region. The high number of members in these areas indicate that adjacent competitions in Ballarat and surrounding areas is having minimal impact on player retention within G21.



2017 player numbers by residential post code

# CATCHMENT AND TRAVEL TIMES

The blue highlighted area shown in the map below indicates an approximate 30 minute drive time (one way) from the five CoGG hockey facilities.

Approximately 92% (1,030) of G21 hockey club players live within the blue area (30 minutes drive time) of CoGG hockey facilities.

The map also provides an indication of the number of players travelling from metropolitan Melbourne, particularly the western fringe between Melbourne and Geelong, to play in the Geelong Hockey Association competition. There are several players participating in the local competition that live in Ballarat.

A breakdown of player travel times for the four venues with home clubs is provided below.

## **Stead Park - (Hockey clubs - Corio, Golden Plains, Hockey Geelong, Kardinia, Saints, and Torquay)**

- 520 combined members
- A total of 60% live within a 30 minute drive of the facility.

## **King Lloyd Reserve (Hockey club - Newtown)**

- 294 members
- A total of 88% live within a 30 minute drive of the facility.

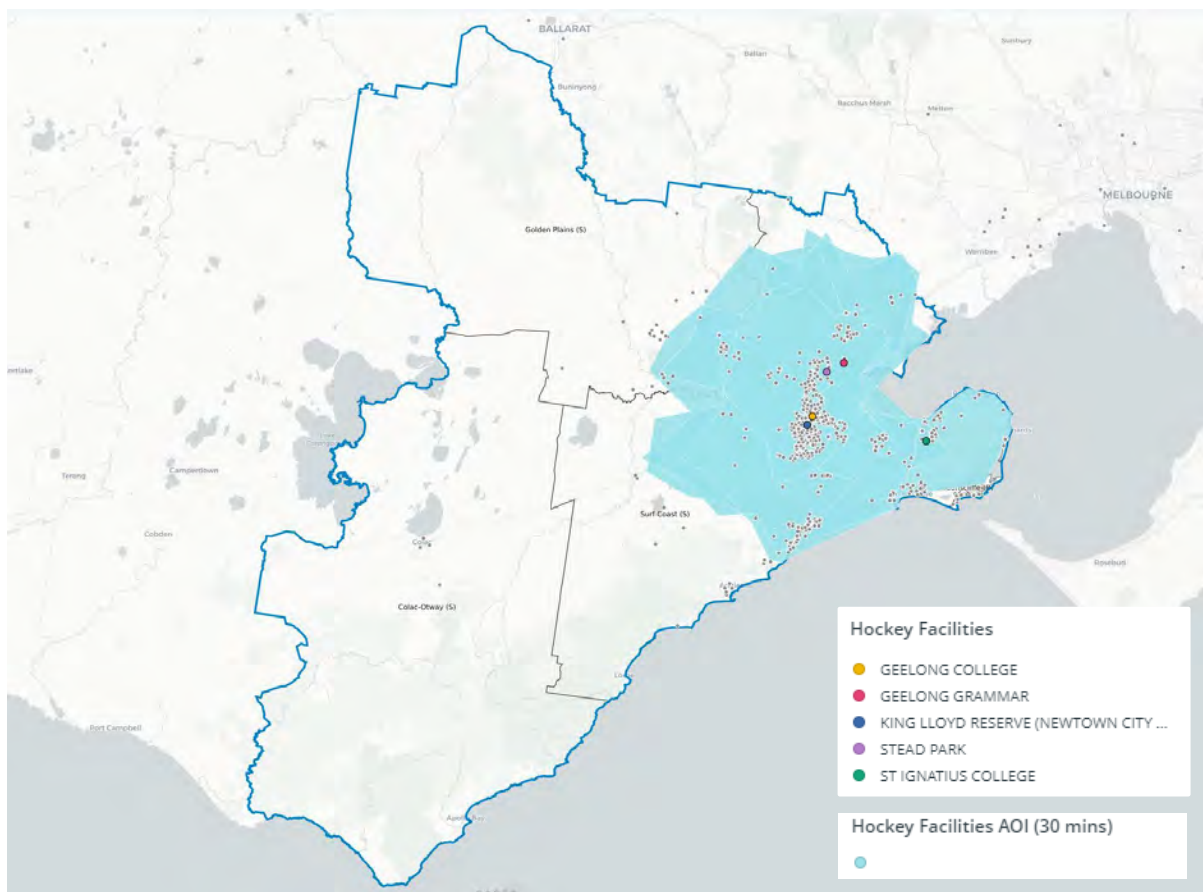
## **Geelong College (Hockey clubs - Geelong College, Geelong)**

- 197 combined members
- A total of 87% live within a 20 minute drive of the facility.

## **St Ignatius College (Hockey club - Bellarine)**

- 120 members.
- A total of 75% live within a 30 minute drive of the facility.

The provision of future synthetic pitches will have a positive impact on travel times.



30 minute facility access drive time



## SOCIAL HOCKEY

Changes in participation driven by lifestyle choice and the demand for shorter, less structured formats of sport is driving the need for the implementation of more social formats. The Geelong Hockey Association and its clubs are encouraged to embrace this change to increase participation.

2016 AusPlay data, along with research undertaken by Hockey Victoria and La Trobe University, supports the delivery of casual forms of hockey to meet the evolving requirements of the current hockey participant.

In response Hockey Victoria, with support from VicHealth, has developed three new forms of hockey to encourage increased and new participation.



J-Ball is delivered on a small hard court (43m x 22m) making it more geographically accessible. The game is played over 3 x 10 minute quarters with modified equipment, that is provided to each participant weekly, eliminating the high competition registration fees and need to purchase equipment.

## Hockey *Game on* Sixers

Aimed at past players who are not affiliated with a club and can participate without committing to regular training and competition, Hockey Sixers is a fast, fun, free-flowing version of hockey played on a smaller field, with 6 players on each team, making it more accessible and easier to get a team together.



KE40 is a new social cardio program aimed to increase and maintain fitness, and develop hockey skills. The program is delivered in conjunction with junior training and competition and is targeted at involving parents of existing participants.



**FACILITY DEVELOPMENT**

# HOCKEY VICTORIA FACILITY HIERARCHY

Hockey Victoria's Strategic Facilities Master Plan (2014) proposes a hierarchy to guide the future provision of hockey facilities across the state.

Although it is recognised that there are variations and different interpretations of the hierarchy when considering existing facilities, the aim is to provide guidance for the establishment and appropriate provision levels for new facilities. It also provides stakeholders with an understanding of the minimum facility requirements for each level of the hierarchy.

According to the proposed hierarchy levels the G21 Region has one Premier Level Facility – Stead Park, which is also currently considered as the Regional Centre for hockey in the G21 region.

The remaining four hockey venues are 'club' or local level facilities despite some of them not meeting the minimum requirements for this level of facility classification. For these facilities to meet the minimum requirements for a true club level facility the following initiatives would be necessary.

## King Lloyd Reserve:

- Development of a synthetic surface, floodlighting and associated infrastructure (as per the Master Plan).

## St Ignatius College:

- Implementation of pitch floodlighting, upgrades to pitch playing area to full size and construction of player change facilities.

## Geelong College:

- Implementation of pitch floodlighting.

## Geelong Grammar:

- Introduction of a home club.

| FACILITY TYPE             | STATE FACILITY  | PREMIER LEAGUE FACILITY                                  | REGIONAL FACILITY   | CLUB FACILITY   |
|---------------------------|---|--|---|---|
| PREFFERED SURFACE TYPE    | 2 x water based synthetic   | Water based or hybrid synthetic                          | Hybrid synthetic (capacity for use by other sports)       | Sand based, hybrid or natural turf                        |
| LIGHTING                  | 1,000 to 2,000 lux  | >300 lux   | >250 lux  | >200 lux  |
| AMENITIES                 | Player, umpire & officials change rooms, covered team benches & media amenities | Player & officials change room, team benches             | Player change rooms, team benches                         | Player change rooms (2), team benches                     |
| SUPPORTING INFRASTRUCTURE | 300 seats spectator area, electronic scoring, parking                           | Covered and uncovered viewing areas, scoreboard, parking | Viewing areas, scoreboard, parking (half pitch desirable) | Viewing areas, scoreboard, parking (half pitch desirable) |

# HV FACILITY DEVELOPMENT FRAMEWORK

Hockey Victoria's Strategic Facilities Masterplan also includes a facilities development framework and guidelines for the future planning of hockey facilities.

These guidelines provide demand triggers for the establishment of new clubs through to the need for a two pitch facility, and are designed to assist clubs and local councils to plan for the future growth and development of hockey.

The diagram below provides an indication of where the existing G21 hockey venues sit within the development framework, recognising that all may not perfectly align.

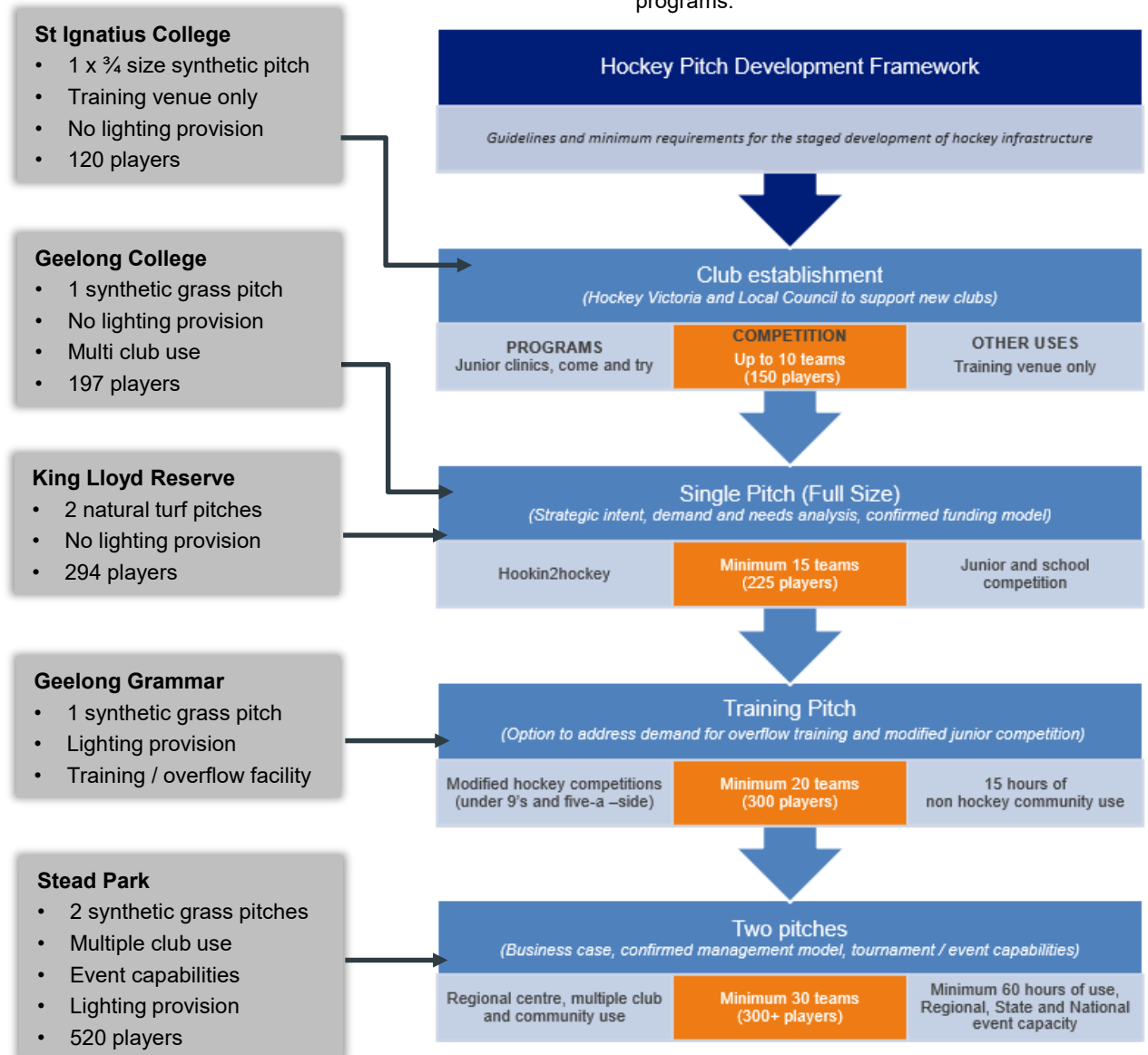
Investment in new, or the upgrade of existing pitch provision within the G21 Region should consider this development framework and aspire to achieve facility provision requirements and associated programming deliverables.

For the purposes of the G21 Regional Hockey Strategy a training pitch is considered a fenced synthetic surface that is half or quarter of the size of a regular competition pitch.

The continued growth of Hookin2hockey and the introduction of social hockey programs provides support for the future development of multi-purpose training pitches to complement competition venues. These smaller pitches are looked on favourably by Hockey Victoria as they provide safe warm up areas and a facility for under 8's and modified hockey programs.

Although Hockey Victoria does not consider grass pitches as a suitable surface for competition or training, grass is still relevant in some country areas and junior programs.

The preferred model for Hockey Victoria is to develop full size synthetic competition hockey pitches that are either single or multi-purpose (depending on levels of use), and half or quarter size pitches for training / modified programs.



# OPPORTUNITIES OUTSIDE GEELONG

Further analysis of 2017 membership data identified key participation hot spots in areas outside of central Geelong that have no (or very limited) hockey provision.

The map below highlights multiple players living in established areas of Torquay, Lara, Bannockburn, Leopold, Drysdale and Ocean Grove. These areas provide an opportunity to promote hockey through the local community and school network, and provides support for increasing the capacity of local club facilities.

## 1. Torquay

A growing club membership base and a current lack of facilities presents an opportunity for the future development of a hockey pitch in Torquay.

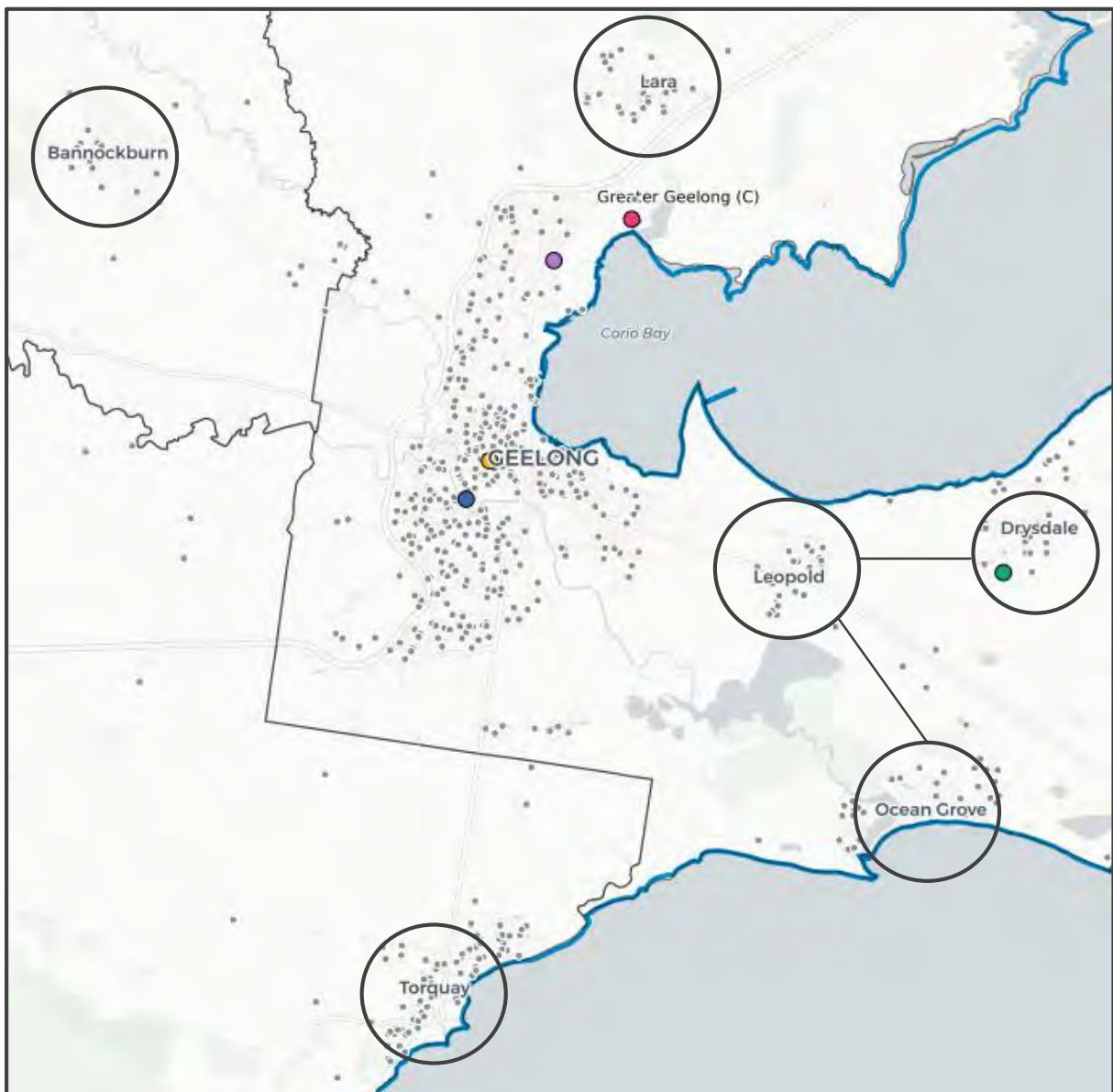
## 2. Drysdale / Ocean Grove / Leopold

Drysdale, Ocean Grove and Leopold collectively service a current player base of 174 and are geographical within close proximity of each other (15 minutes drive one way).

## 3. Bannockburn

The small number of hockey players in Bannockburn (members of the Golden Plains Hockey Club) travel a significant distance to play at Stead Park (approximately 25 minutes). With no hockey provision and forecast population growth, there is an opportunity to increase the profile of hockey in Bannockburn.

At present Golden Plains Hockey Club have limited access to a shared grass soccer pitch for junior training at the Bannockburn Recreation Precinct.



*Spread of hockey players outside central Geelong*

# ARMSTRONG CREEK WEST AND TORQUAY

Further analysis of the current and potential future hockey player catchment within a 10km radius of Armstrong Creek West and Torquay has been undertaken.

## **Proposed Armstrong Creek West Hockey Pitch (10km radius)**

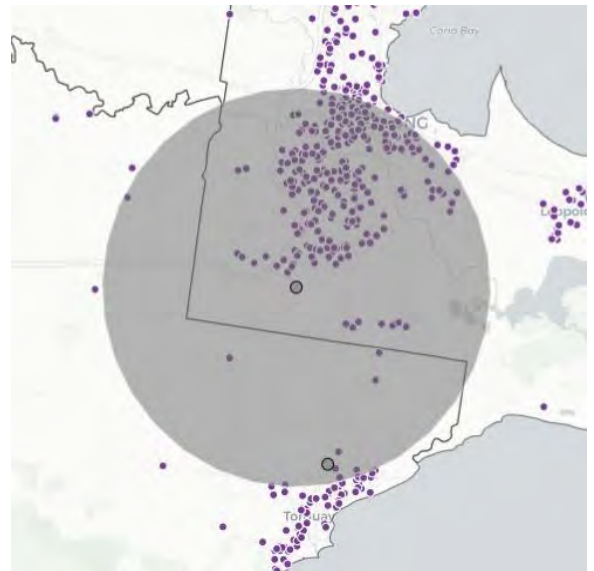
- Hockey players in 2017 – 481
- Dominant postcode - 3216 (242 players)
- Current player to resident ratio - 1:353
- Forecasted players to 2028 – 546
- Player growth 2018 to 2028 - +65 (based on current penetration rate)

CoGG has advised that the two planning areas within Armstrong Creek (Armstrong Creek-Marshall-Charlemont and Grovedale-Mount Duneed-Waurn Ponds) will reach 31,745 and 32,533 residents respectively by 2036.

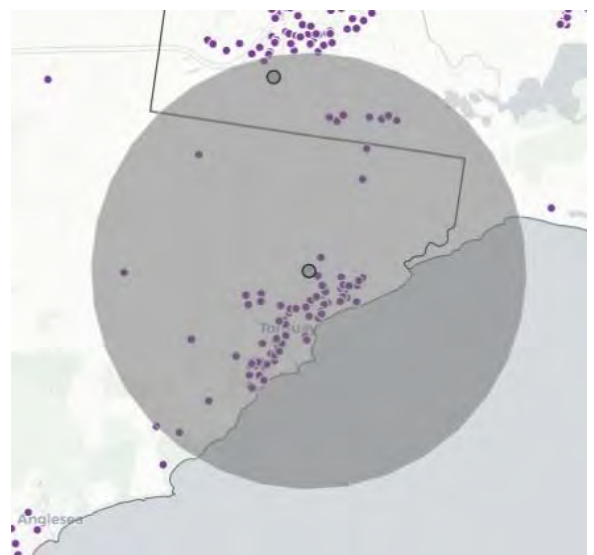
The proposed Armstrong Creek West Regional Sports Precinct (which includes a regional hockey pitch) will be triggered when development (dwellings) reach 3,000. As at June 2018 the number of dwellings was 1,084 (36% of target). The following page provide a map of current and future growth areas within CoGG.

## **Proposed Torquay Hockey Pitch (10km radius)**

- Torquay players in 2017 – 158 (the club has previously had a total membership of approximately 223)
- Dominant postcode - 3228 (139 players)
- Current player to resident ratio - 1:136
- Forecasted players to 2028 – 204
- Player growth 2018 to 2028 - +46 (based on current penetration rate)



*Players within 10km radius of proposed Armstrong Creek West hockey pitch*



*Players within 10km radius of proposed Torquay hockey pitch*





Geelong Hockey Assoc. Inc.  
PO Box 1321 Geelong 3220

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**HOCKEY GEELONG**

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# THE FRAMEWORK

The following diagram outlines the strategic framework that will guide the future provision of hockey facilities and development initiatives in the G21 Region to 2028. Six strategic priorities are supported by twelve key objectives that have led to the development of regional and local hockey recommendations.

**G21 HOCKEY VISION: BUILDING A STRONG, INCLUSIVE AND SUSTAINABLE HOCKEY COMMUNITY IN THE G21 REGION**

**GUIDING PRINCIPLES: TO BE APPLIED TO ALL FUTURE HOCKEY PLANNING AND DEVELOPMENT PROJECTS**

## 1. FACILITY ACCESS

### STRATEGIC PRIORITY 1

PROVIDE FUNCTIONAL AND ACCESSIBLE HOCKEY FACILITIES

**OBJECTIVE 1:** Partner with the education sector to better utilise existing facilities and influence future development opportunities

**OBJECTIVE 2:** Increase participation opportunities by advocating for investment in existing facilities (including school facilities).

### STRATEGIC PRIORITY 2

INCREASE CAPACITY OF EXISTING FACILITIES AND DELIVER NEW PITCHES TO MEET FUTURE DEMAND

**OBJECTIVE 1:** Aspire for all existing and future planned hockey pitches to be floodlit to maximise participation opportunities

**OBJECTIVE 2:** Provide additional club based synthetic pitches in key growth areas and investigate the conversion of existing grass to synthetic pitches

## 2. PARTICIPATION

### STRATEGIC PRIORITY 3

INCREASE HOCKEY PARTICIPATION THROUGH IMPROVED PROGRAMMING

**OBJECTIVE 1:** Support and develop attractive and affordable hockey programs that cater for existing and new players

**OBJECTIVE 2:** Support and enable GHA and individual clubs to implement weekend hockey programs and competitions to address demand

### STRATEGIC PRIORITY 4

EMBRACE NEW FORMATS THAT ENGAGE NEW PARTICIPANTS

**OBJECTIVE 1:** Activate available facilities, including floodlit facilities, to deliver new social hockey formats

**OBJECTIVE 2:** Support GHA and individual clubs in the ongoing delivery of the School Roadshow program in all G21 primary schools

## 3. SPORT DEVELOPMENT

### STRATEGIC PRIORITY 5

ADOPT STRATEGIES THAT SUPPORT THE DEVELOPMENT OF SUSTAINABLE CLUBS

**OBJECTIVE 1:** Review governance and administration practices to deliver a collaborative regional approach to hockey delivery

**OBJECTIVE 2:** Review fees and charges and implement initiatives to reduce participation cost barriers and access to hockey

### STRATEGIC PRIORITY 6

PROMOTE HOCKEY IN THE REGION THROUGH COLLECTIVE MARKETING STRATEGIES AND INITIATIVES

**OBJECTIVE 1:** Use hockey resources to support the GHA in investigating opportunities to increase broader awareness of hockey in the Region.

**OBJECTIVE 2:** Advocate for additional support from Hockey Victoria through the appointment of a Regional Development Officer

**PRIORITY RECOMMENDATIONS – DETAILED ON THE FOLLOWING PAGES**



## IMPLEMENTATION PLAN

Key project roles have been assigned to individual stakeholder groups to support the initiation, timely delivery and support of strategic directions and recommendations.

Key roles are outlined below:

### Initiate

Leading, planning and scoping the range and timing of strategic directions, programs, activities and service provision.

### Deliver

On the ground delivery of strategic directions, activities and services to the G21 Region hockey community.

### Support

Support for program, activity and service delivery through the provision of people, skills, funding, equipment and promotion.

**To ensure key actions can be achieved, ongoing collaboration between all stakeholders is essential.**

**Strategic directions have been allocated a level of priority based on their overall impact on the delivery and sustainability of hockey within the G21 Region.**

Priority stages are outlined below.

### Critical (0-1 year)

A strategic direction that has a serious impact on ongoing service delivery and, without achievement other strategic directions cannot be progressed.

### High (1-2 years)

A strategic direction of high importance that underpins sports development and infrastructure improvements across the Region.

### Medium (3-5 years)

Strategic direction that contributes to meeting overall Regional Strategy objectives.

### Low (5-10 years)

Strategic direction that contributes to overall Regional Strategy improvement activities but do not supersede other objectives.

### Ongoing

Strategic direction that will require ongoing commitment by all stakeholders.

#### OBJECTIVE 1

Partner with the education sector to better utilise existing facilities and influence future development priorities

#### OBJECTIVE 2

Increase participation opportunities through advocating for investment in existing facilities (including school facilities)

| TASK | STRATEGIC RECOMMENDATIONS  | PRIORITY | STAKEHOLDER RESPONSIBILITY                             |          |         |
|------|--|----------|--|----------|---------|
|      |  |          | INITIATE   | DELIVER  | SUPPORT |
| 1.1  | Negotiate improved access and use of existing school facilities at Geelong College and St Ignatius College by strengthening partnerships with the education sector. Utilise these facilities as satellite/training venues to support local demand.   | Critical | Hockey Victoria (HV), Geelong Hockey Association (GHA) | GHA      | Clubs   |
| 1.2  | Investigate opportunities to partner with Geelong Grammar to improve site access for both competition and training purposes. Investigate joint funding opportunities to address existing pitch issues and upgrade the venue to the required standard to accommodate regular club activities. | High     | GHA, HV  | GHA      | Clubs   |
| 1.3  | Investigate opportunities to provide better facility access locally for the Golden Plains Hockey Club. Explore school partnership opportunities for satellite/training facilities within the Golden Plains Shire (GPS).  | Medium   | GHA, GPS   | GHA, GPS | Clubs   |
| 1.4  | Support local participation growth in key areas outside of central Geelong (such as Leopold and Ocean Grove) and ensure appropriate access is provided to a suitable training pitch.   | Low      | GHA, HV  | GHA, HV  | Clubs   |
| 1.5  | Investigate potential shared use arrangements for overflow training opportunities for Hookin2hockey at Northern Bay Secondary College (Corio) and Trinity College (Colac).   | Low      | GHA, HV  | GHA, HV  | GHA, HV |

#### OBJECTIVE 1

Aspire for all existing and future planned hockey pitches to be floodlit to maximise participation opportunities

#### OBJECTIVE 2

Provide additional club based synthetic pitches in key growth areas and investigate the conversion from grass to synthetic

| TASK | STRATEGIC RECOMMENDATIONS   | PRIORITY | STAKEHOLDER RESPONSIBILITY                     |                     |                               |
|------|---|----------|--|---------------------|-------------------------------|
|      |   |          | INITIATE                                       | DELIVER             | SUPPORT                       |
| 2.1  | To accommodate the future demand for hockey ensure the proposed Regional Hockey Centre remains on the development plan for the Armstrong Creek West Regional Sports Precinct.   | Critical | City of Greater Geelong (CoGG), HV             | CoGG, HV            | GHA, SRV                      |
| 2.2  | Undertake a detailed business case including a proposed funding model. If proven, obtain Council endorsement to seek funding for a local multipurpose synthetic competition standard hockey pitch at the Torquay Sports Precinct, in partnership with Surf Coast Secondary College. Any Council contribution will be subject to Council's budget processes. | Critical | Surf Coast Shire (SCS), HV, GHA and Torquay HC | SCS, Torquay HC, HV | HV, GHA, SRV                  |
| 2.3  | Investigate opportunities to develop a synthetic pitch on private land to the north of King Lloyd Reserve in accordance with the reserve master plan. The development of a synthetic hockey pitch and its associated infrastructure at King Lloyd Reserve will need to be supported by increased participation outcomes.                                    | High     | HV, CoGG, GHA                                  | CoGG, GHA, HV       | GHA, Newtown Hockey Club, SRV |
| 2.4  | Confirm floodlighting lux levels at Geelong Grammar and identify upgrade opportunities to meet club level (200 lux) or higher standards.  | High     | HV, GHA  | HV, GHA             | GHA                           |
| 2.5  | Explore options in the Golden Plains Shire for a synthetic pitch to promote training to senior level with a long term view to provide a full sized pitch subject to demand.   | Medium   | GPS, HV, GHA                                   | GPS, GHA            | HV, SRV                       |
| 2.6  | To support the growth of hockey in the Bellarine, investigate opportunities to increase the size of the pitch to competition standard at St Ignatius College and install lights.  | Medium   | HV, GHA  | HV                  | GHA, SRV                      |
| 2.7  | Monitor participation provision ratios and population benchmarks, and identify triggers for new facility development.   | Ongoing  | All LGAs, HV                                   | All LGAs, HV        | GHA                           |

#### OBJECTIVE 1

Support and develop attractive and affordable hockey programs that cater for existing and new players

#### OBJECTIVE 2

Support and enable the GHA and individual clubs to implement weeknight hockey programs and competitions to address demand

| TASK | STRATEGIC RECOMMENDATIONS  | PRIORITY | STAKEHOLDER RESPONSIBILITY |                |                  |
|------|--|----------|----------------------------|----------------|------------------|
|      |  |          | INITIATE                   | DELIVER        | SUPPORT          |
| 3.1  | Review occupancy and usage arrangements at Stead Park to ensure the facility is offering fair and equitable access to all clubs, and determine any opportunities for increased use for weeknight competitions or social hockey.      | Critical | GHA                        | GHA            | HV               |
| 3.2  | Explore the capacity and availability of existing multi-use venues at Geelong College and Geelong Grammar, and identify opportunities to implement weeknight programming to meet demand.   | High     | GHA, HV                    | GHA, Clubs     | HV               |
| 3.3  | Review the hockey player development pathway and identify strategies that minimise participant drop off and support the transition into senior competition.  | Medium   | HV, GHA                    | HV, GHA        | GHA, Clubs       |
| 3.4  | Engage disadvantaged and low socio-economic communities through the implementation of local 'introductory hockey programs', with a specific focus on Corio / Norlane where existing proximity to Stead Park removes travel barriers. | Low      | HV, GHA                    | GHA, Clubs     | LGAs             |
| 3.5  | Investigate opportunities to host state and national level events and competitions at Stead Park to increase local interest in hockey and contribute to the local economy.   | Ongoing  | HV, GHA, CoGG              | HV, GHA, Clubs | LGAs, G21 Pillar |

#### OBJECTIVE 1

Activate available facilities, including floodlit facilities, to deliver new social hockey formats

#### OBJECTIVE 2

Support the GHA and individual clubs in the ongoing delivery of the School Roadshow program in all G21 primary schools.

| TASK | STRATEGIC RECOMMENDATIONS   | PRIORITY | STAKEHOLDER RESPONSIBILITY |               |               |
|------|---|----------|----------------------------|---------------|---------------|
|      |   |          | INITIATE                   | DELIVER       | SUPPORT       |
| 4.1  | Support clubs to deliver social and unstructured forms of hockey to their members and the wider community. Explore funding opportunities to support activity delivery and facilitation. | Critical | HV, GHA, Clubs             | HV, GHA Clubs | LGAs, Schools |
| 4.2  | Increase the number of G21 schools offering School Roadshow programs annually by at least 5% by establishing greater partnerships with the education sector.                            | Critical | HV, GHA, Clubs             | HV, GHA       | GHA           |



#### OBJECTIVE 1

Review governance and administration practices to deliver a collaborative regional approach to hockey delivery

#### OBJECTIVE 2

Review fees and charges and implement initiatives to reduce participation cost barriers and access to hockey

| TASK | STRATEGIC RECOMMENDATIONS   | PRIORITY | STAKEHOLDER RESPONSIBILITY |                |                      |
|------|---|----------|----------------------------|----------------|----------------------|
|      |   |          | INITIATE                   | DELIVER        | SUPPORT              |
| 5.1  | Support GHA to develop a business plan, to be delivered in conjunction with the regional strategy, that provides clear organisational and operational directions for the association, its clubs and facility owners.  | Critical | HV, GHA                    | HV, GHA        | Relevant LGAs, Clubs |
| 5.2  | Review the structure of hockey in the Region and identify preferred management and operational models and joint use agreements for proposed new pitch developments in Torquay and Armstrong Creek West, that will enable facility and participation growth. | High     | HV, GHA, Clubs             | HV, GHA, Clubs | Relevant LGAs        |
| 5.3  | Hockey Victoria to review affiliation fees to ensure entitlements are reflective of the level of support provided. GHA and clubs to conduct a review process to ensure fees align with club financial sustainability strategies.                            | High     | GHA, Clubs                 | GHA, Clubs     | HV                   |

#### OBJECTIVE 1

Use LGA resources to support the GHA in investigating opportunities to increase broader awareness of hockey in the Region

#### OBJECTIVE 2

Advocate for additional support from Hockey Victoria through the appointment of a Regional Development Officer

| TASK | STRATEGIC RECOMMENDATIONS  | PRIORITY | STAKEHOLDER RESPONSIBILITY |                |                |
|------|--|----------|----------------------------|----------------|----------------|
|      |  |          | INITIATE                   | DELIVER        | SUPPORT        |
| 6.1  | Increase the level of support from Hockey Victoria through the appointment of a G21 Regional Club Development Officer. Explore joint funding models for supporting this position.  | Critical | GHA                        | HV, GHA        | Clubs          |
| 6.2  | Develop strategies and initiatives in collaboration with clubs to attract and maintain new participants, acknowledging national sporting trends of providing more non-traditional, unstructured and social forms of participation.                               | High     | HV, GHA                    | HV, GHA, Clubs | SRV, VicHealth |
| 6.3  | Develop and foster partnerships with other compatible synthetic based sports such as tennis, soccer (training), gridiron, touch rugby and lacrosse to support increased multi / shared use models, and leverage relationships to engage new participant markets. | Medium   | GHA, LGAs                  | GHA            | LGAs, Clubs    |

# MUNICIPAL PRIORITIES – CITY OF GREATER GEELONG

The following recommendations from Priority's 1 – 6 are relevant to the City of Greater Geelong catchment. Please refer to the item in the priority tables to understand the stakeholder responsibilities for each recommendation.

| Priority area                       | Strategic recommendation   |
|-------------------------------------|--|
| Facility Access<br>(1.2 - High)     | Investigate opportunities to partner with Geelong Grammar to improve site access for both competition and training purposes. Investigate joint funding opportunities to address existing pitch issues and upgrade the venue to the required standard to accommodate regular club activities.                             |
| Facility Access<br>(2.1 - Critical) | To accommodate the future demand for hockey ensure the proposed Regional Hockey Centre remains on the development plan for the Armstrong Creek West Regional Sports Precinct.  |
| Facility Access<br>(2.3 - High)     | Investigate opportunities to develop a synthetic pitch on private land to the north of King Lloyd Reserve in accordance with the reserve master plan. The development of a synthetic hockey pitch and its associated infrastructure at King Lloyd Reserve will need to be supported by increased participation outcomes. |
| Facility Access<br>(2.7 - Ongoing)  | Monitor participation provision ratios and population benchmarks, and identify triggers for new facility development.  |
| Participation<br>(3.4 - Low)        | Engage disadvantaged and low socio-economic communities through the implementation of local 'introductory hockey programs', with a specific focus on Corio / Norlane where existing proximity to Stead Park removes travel barriers.   |
| Participation<br>(3.5 - Ongoing)    | Investigate opportunities to host state and national level events and competitions at Stead Park to increase local interest in hockey and contribute to the local economy.   |
| Participation<br>(4.1 - Critical)   | Support clubs to deliver social and unstructured forms of hockey to their members and the wider community. Explore funding opportunities to support activity delivery and facilitation.  |

# MUNICIPAL PRIORITIES – SURF COAST SHIRE

The following recommendations from Priority's 1 – 6 are relevant to the Surf Coast Shire catchment. Please refer to the item in the priority tables to understand the stakeholder responsibilities for each recommendation .

| Priority area                       | Strategic recommendation   |
|-------------------------------------|--|
| Facility Access<br>(2.2 - Critical) | Undertake a detailed business case including a proposed funding model. If proven, obtain Council endorsement to seek funding for a local multipurpose synthetic competition standard hockey pitch at the Torquay Sports Precinct, in partnership with Surf Coast Secondary College. Any Council contribution will be subject to Council's budget processes.. |
| Facility Access<br>(2.7 - Ongoing)  | Monitor participation provision ratios and population benchmarks, and identify triggers for new facility development.  |
| Participation<br>(4.1 - Critical)   | Support clubs to deliver social and unstructured forms of hockey to their members and the wider community. Explore funding opportunities to support activity delivery and facilitation.  |

# MUNICIPAL PRIORITIES – GOLDEN PLAINS SHIRE

The following recommendations from Priority's 1 – 6 are relevant to the Golden Plains Shire catchment. Please refer to the item in the priority tables to understand the stakeholder responsibilities for each recommendation .

| Priority area                      | Strategic recommendation  |
|------------------------------------|---|
| Facility Access<br>(1.3 - Medium)  | Investigate opportunities to provide better facility access locally for the Golden Plains Hockey Club. Explore school partnership opportunities for satellite/training facilities within the Golden Plains Shire. |
| Facility Access<br>(2.5 - Medium)  | Explore options in the Golden Plains Shire for a synthetic pitch to promote training to senior level with a long term view to provide a full sized pitch subject to demand.                                       |
| Facility Access<br>(2.7 - Ongoing) | Monitor participation provision ratios and population benchmarks, and identify triggers for new facility development.   |
| Participation<br>(4.1 - Critical)  | Support clubs to deliver social and unstructured forms of hockey to their members and the wider community. Explore funding opportunities to support activity delivery and facilitation.                           |

# MUNICIPAL PRIORITIES – COLAC OTWAY SHIRE

The following recommendations from Priority's 1 – 6 are relevant to the Colac Otway Shire catchment. Please refer to the item in the priority tables to understand the stakeholder responsibilities for each recommendation.

| Priority area                      | Strategic recommendation  |
|------------------------------------|---|
| Facility Access<br>(2.7 - Ongoing) | Monitor participation provision ratios and population benchmarks, and identify triggers for new facility development.   |
| Participation<br>(4.1 – Critical)  | Support clubs to deliver social and unstructured forms of hockey to their members and the wider community. Explore funding opportunities to support activity delivery and facilitation. |



## FUNDING AND INVESTMENT

Hockey is a sport that has always made significant financial contributions towards facilities. The sport and local clubs take their responsibility for the ongoing maintenance and replacement of pitch surfaces very seriously and invest heavily in facilities.

The Geelong Hockey Association makes a significant contribution to capital, renewal and maintenance costs of the Stead Park facility. The GHA contributed \$250,000 (13%) to the construction cost of the second pitch, fund renewal of the pitch surfaces (estimated at around \$400,000 each) and contribute approximately \$3,000 per year to the maintenance of the pitch surfaces.

Due to the significant cost to replace a synthetic hockey pitch (approximately \$500,000) clubs develop sinking funds to ensure pitches can be immediately replaced when they reach end of life. Hockey Victoria requests that Premier League clubs have a facilities replacement strategy and strongly encourage clubs to negotiate better deals with land owners.

However, this self funding model is challenging for some clubs as the cost of surface replacement continues to rise. Some clubs are unable to raise the funds and rely on the support of state and local government. Investment into synthetic pitches not only needs a funding model for development, but also a strategy and defined responsibilities for renewal and maintenance.

New hockey pitches cost approximately \$1.5m to \$1.8m and generally rely on a range of funding partners to support delivery. Sport and Recreation Victoria's Major Facilities Funding program provides grants of up to \$800,000 for sub-regional and regional sports facilities. This funding category will potentially be suitable for the proposed Armstrong Creek West Regional Centre but may not meet the criteria for the proposed Torquay facility.

Development of hockey infrastructure at King Lloyd Reserve will need to be supported by significant investment and demonstrated participation outcomes. Acquiring private land for the development of a synthetic hockey pitch will be a matter for the City of Greater Geelong to consider.

The financial cost of implementing the recommendations outlined in this Strategy has not been determined, however it is critical that key stakeholders, as well as potential funding providers adopt a coordinated approach to the scoping and delivery of these recommendations and recognise the need for multiple funding partners.

Collaboration between Hockey Victoria, GHA and G21 LGAs will be essential to delivering strategic priorities and advocating for funding via election commitments.



## APPENDICES

# APPENDIX 1

## STATEMENT REGARDING THE STATE OF PLAY REPORT

The strategic directions and recommendations in the G21 Regional Hockey Strategy was informed by the State of Play Report developed in May 2018.

The purpose of the State of Play Report was to collate and confirm the accuracy of all research and stakeholder consultation findings, and to present the preliminary directions for PCG approval.

It should be noted that the State of Play Report is considered an internal document only and has been superseded by the development of the G21 Regional Hockey Strategy.

# APPENDIX 2

## G21 REGIONAL HOCKEY STRATEGY PARTICIPANT SURVEY SUMMARY REPORT - APRIL 2018

### KEY SURVEY FINDINGS

The G21 Hockey Survey was distributed to G21 players and officials by Hockey Victoria and the Geelong Hockey Association and was open from 3<sup>rd</sup> April – 1<sup>st</sup> May 2018.

Various questions were skipped by respondents, making individual question analysis vary depending on the response rate.

Key highlights from the survey are grouped below in relevant themes.

#### STRATEGIC PRIORITIES

Respondents highlighted the following as the key focus / priority areas for the G21 Hockey Strategy:

- The need for additional grounds within the Region to minimise facility access travel time (73 responses).
- Reducing the fees / costs associated with participating (46 responses).
- Additional programming opportunities / coaches (35 responses).

#### PARTICIPATION

- 58% of surveyed respondents attributed their connection with hockey as a direct result of an immediate family member already playing the game.

#### MOTIVATION

- Almost 40% of respondents identified their motivation to stay connected to hockey was a result of an immediate family members involvement in the game.
- Introduction to hockey through the Hookin2Hockey program was also cited as a significant motivator for hockey participation.

#### ACCESS AND PROGRAMMING

- 90% of respondents play the majority of their hockey at Stead Park, with 80% also identifying this ground at their main training facility.
- Just over a quarter of respondents (26%) travel less than 20 minutes (return trip) to access their local hockey facility, with 14% of respondents traveling between 1-1.5 hour.
- 22% of respondents (31 responses) highlighted the need for additional weeknight programming opportunities.
- 60% of respondents were aware of Hockey Victoria's social game formats, with only 16% of respondents confirming their interest in participating.
- In regard to the number of days respondents accessed their local hockey facility, the highest response was 'twice per week in the winter season'.

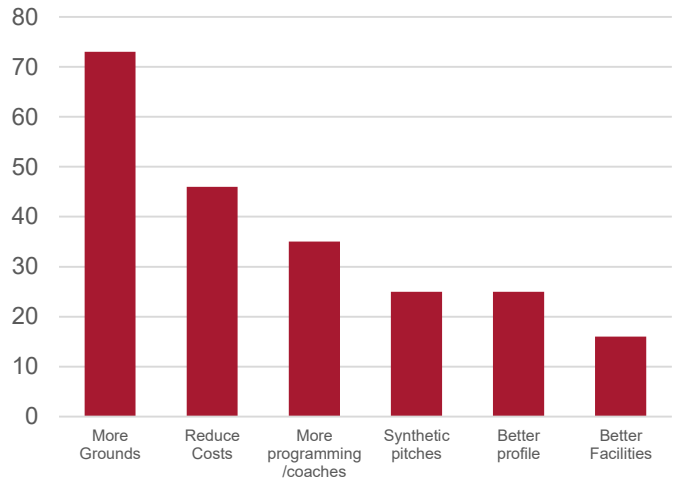
#### DEMOGRAPHICS

- 244 respondents completed the survey. Of these, 205 (70%) were current players or parents of current players. The remaining 30% were completed by former players or club administrators.
- All nine G21 clubs provided at least one response to the survey, and all but one Hockey Geelong competition grade was represented (Under 8's Summer Competition).
- Almost half of all respondents were over the age of 41 years.
- 76% of surveyed respondents reside within the City of Greater Geelong.
- Almost half of all respondents (46%) identified local facility access as having a direct influence on the level of local involvement.
- Over a quarter of respondents (28%) stated their involvement with hockey exceeded 10 years.
- Over half of surveyed respondents (54%) stated "increasing the profile of hockey within the Region" as key to increasing participation.

## STRATEGIC PRIORITIES

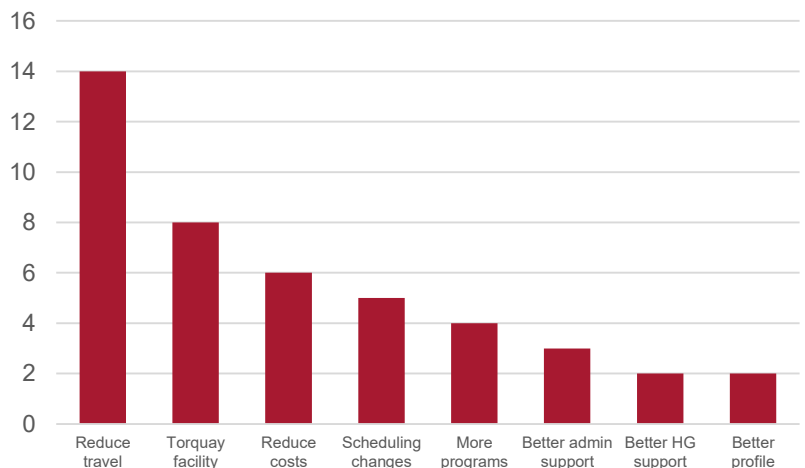
- ▶ 172 respondents identified their top 3 priorities for the Strategy. Of those responses, the following trends were identified:
  - ▶ The need for additional grounds within the region to minimise facility access travel time was identified 73 times.
  - ▶ Reducing the fees / costs associated participating was cited 46 times.
  - ▶ Additional programming / coaches was identified 35 times by respondents.
  - ▶ Other key trends highlighted were: Conversion of all pitches to a synthetic surface, increasing the profile of hockey within the region and provision of better quality facilities.
- ▶ Respondents were given the opportunity to provide up to three key priorities.

### Top 3 Priorities for Strategy



- ▶ Respondents were given the opportunity to provide general commentary in regards to G21 Hockey Strategy development, with 57 answers being provided.
- ▶ Of the details supplied, key trends were identified as:
  - ▶ Additional pitches / facilities required to minimise travel time. 24% (14 responses) identified this as a key consideration for the Strategy.
  - ▶ 8 respondents (14%) highlighted the need for the Strategy to explore the provision of a new hockey facility in Torquay.
  - ▶ 6 respondents identified the cost of participating / high fees as a key issue hampering hockey participation across the region.

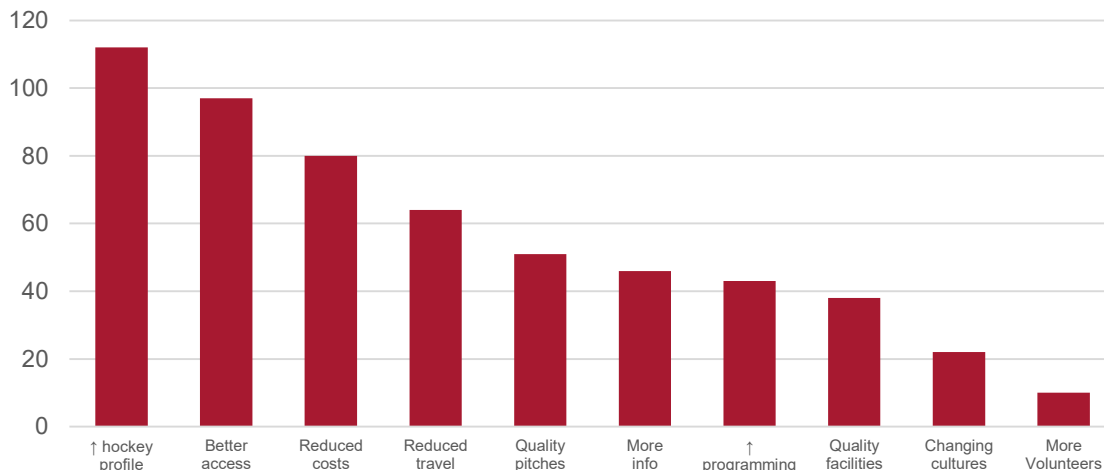
### Additional Strategy commentary



## INCREASING PARTICIPATION

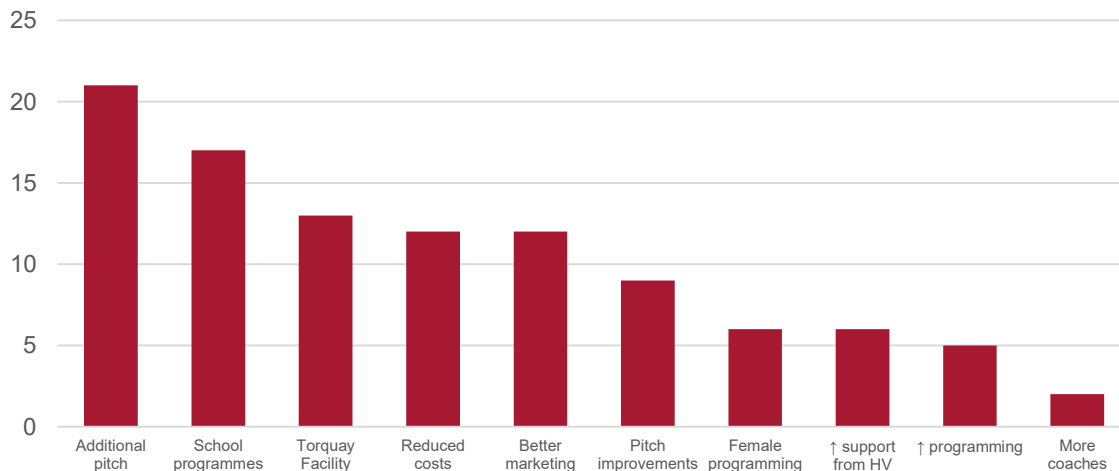
- ▶ The key to increasing hockey participation indicated by the 206 respondents were identified as:
  - ▶ “Increasing the profile of hockey within the region (54%)
  - ▶ “Greater access to playing / training fields” (47%)
  - ▶ “Decreased costs associated with playing hockey” (39%)
- ▶ Respondents were given the opportunity to provide up to three key answers.

### Key to increasing hockey participation



- ▶ An additional opportunity was offered to respondents to provide commentary in regards to increasing hockey participation through free text.
- ▶ A total of 115 responses were collected, highlighted the following key themes:
  - ▶ Provision for an additional ground (21 responses) received 18% of total question responses.
  - ▶ Additional hockey programming in schools (17 responses) received 15% of all question answers.
  - ▶ Provision for an a synthetic pitch in Torquay was highlighted by 13 respondents (11%).
  - ▶ Greater marketing and promotion for hockey within the Region and reduction of costs associated with participating both received 12 responses respectively, accounting for 10% of all responses each.

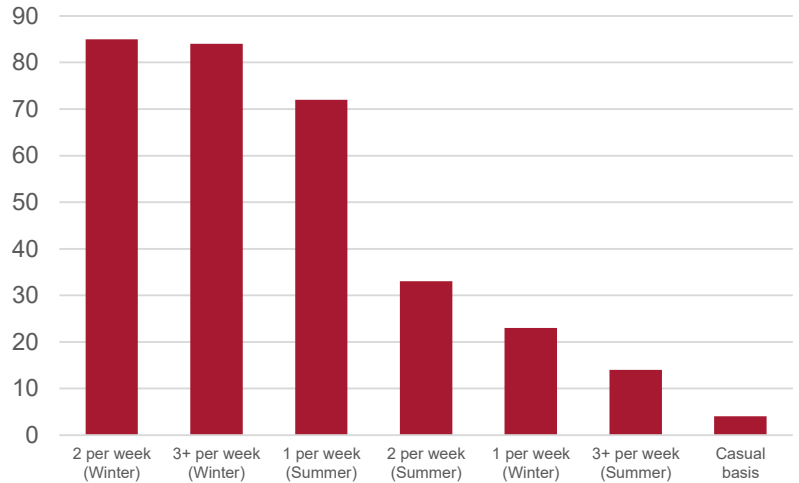
### Increasing hockey participation



## FACILITY ACCESS

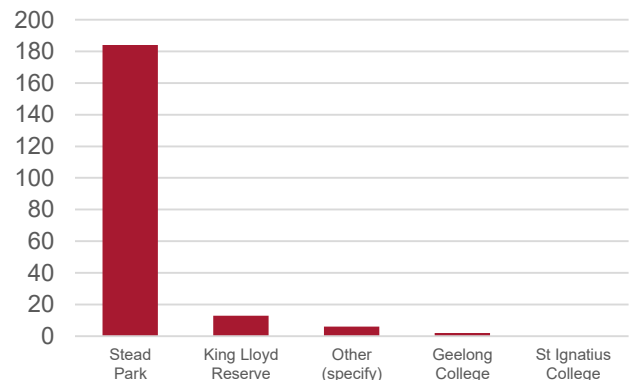
- ▶ 206 respondents answered this question, providing a total of 317 responses (up to two per person).
- ▶ Of the 317 responses, 85 identified using a hockey facility twice per week in winter, with 84 stating their average as three times per week.
- ▶ In summer, 35% of respondents identified using their facility once per week (72 responses).

### Respondent avg hockey facility usage



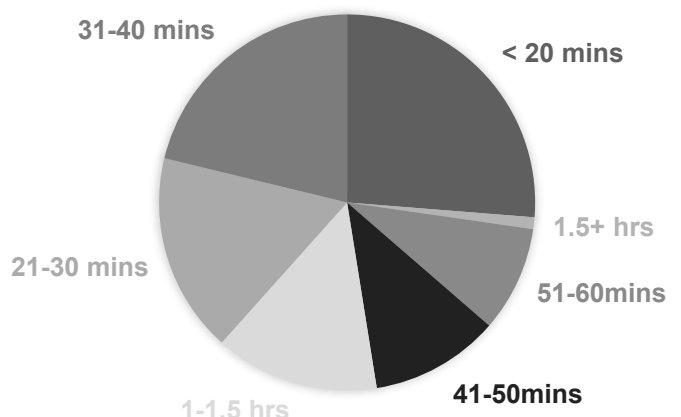
- ▶ As expected, Stead Park accounted for the majority of hockey participation with 184 / 205 responses selecting this facility as playing majority of their hockey (90%).
- ▶ King Lloyd Reserve was the second most commonly used venue with 13 responses.
- ▶ Of the 205 responses provided for the most prominent training facility, Stead Park accounted for 80% of responses.
- ▶ Followed by 'Other' (19 responses). 8 of these identified the Torquay Football Field as their training venue, and 3 identified Ballarat.

### Facility where respondents play majority of their hockey



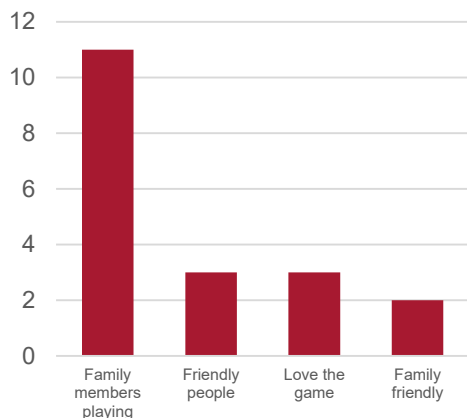
- ▶ The second most common drive time was identified as 31 - 40 minutes, accounting for 21% of all responses.
- ▶ 14% of respondents (18 / 206) travel between 1 - 1.5 hours to access their local facility.

### Travel time to access local facility (return)



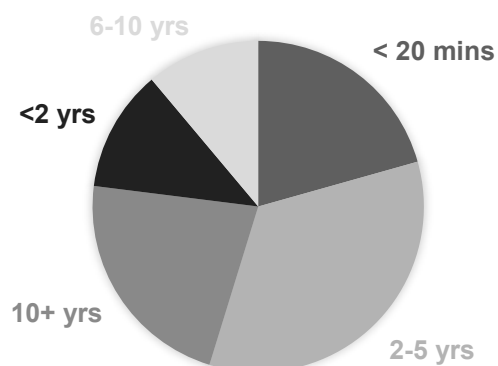
## MOTIVATION

### Main reason for staying connected to hockey



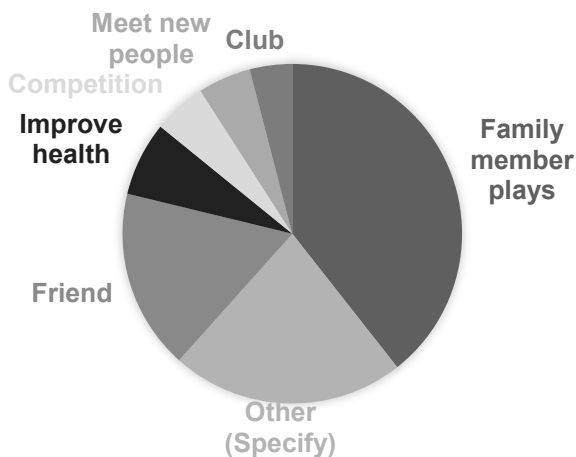
- ▶ Only 19 of the respondents provided an answer to this question.
- ▶ Of the 96 responses, 58% attributed their connection with hockey as a direct result of an immediate family member already playing the game.

### Time involved in hockey within the G21 region



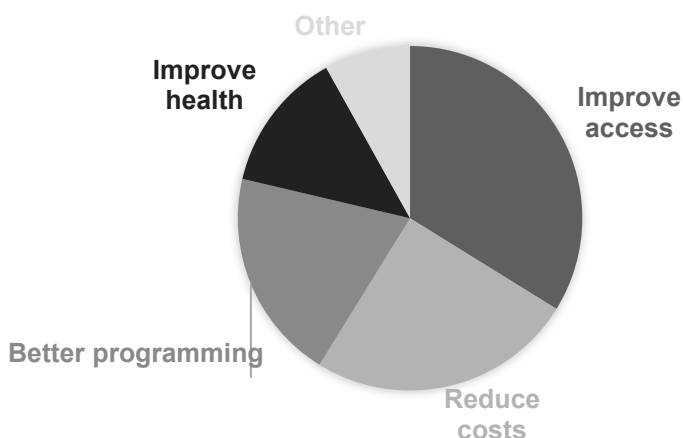
- ▶ Of the 206 respondents to provide an answer, 43% have been involved in hockey in the G21 region for 2 - 5 years.
- ▶ Over a quarter of respondents (28%) have been involved in hockey for 10+ years.
- ▶ 38 respondents skipped this question.

### Initial motivation to play hockey



- ▶ Of the 206 respondents providing an answer to this question, almost 40% identified an imminent family member playing hockey as the initial motivator to participating.
- ▶ Of the 'Other' (22%) responses, 16 outlined the School Roadshow program through their school as the initial motivator for their participation in hockey.

### Methods to increase involvement in local hockey



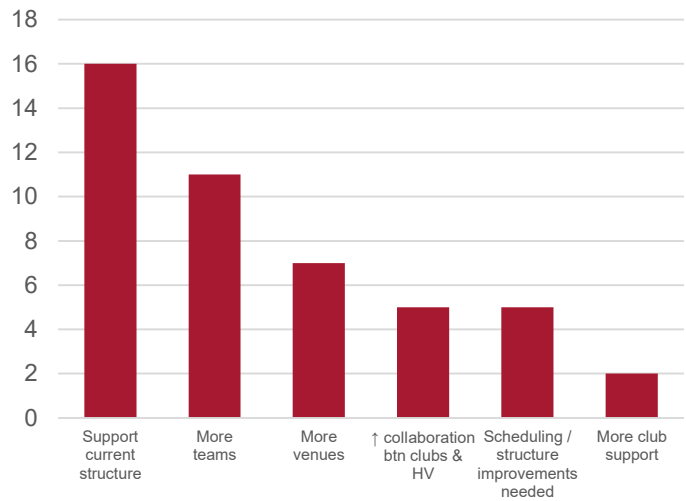
- ▶ Almost half of all respondents (46%) identified local facility access as having a direct influence on the level of local hockey involvement.
- ▶ Reducing costs associated with participating in hockey was identified as another key influence to increasing involvement in hockey.

## ACCESS AND PROGRAMMING

► Key themes as a result of a free text question posed regarding the current format of competition structures identified the following:

- 16 respondents support existing competition structure
- 11 respondents identified the need for additional teams within G21 competitions
- Additional venues to support increases in participation.
- A total of 73 responses were provided to this question. A total response rate of 35% completion.

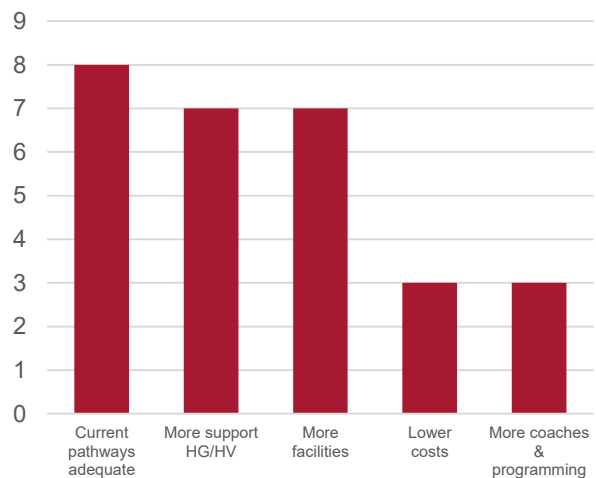
### Feedback on current structures



► 65 respondents provided feedback regarding current junior development pathways. Of those responses, the following trends were identified:

- 8 respondents stated that existing pathways are good / adequate (12% of all responses).
- 7 respondents identified the need for an additional facility within the region to foster growth, with a further 7 identifying a need for greater support from Hockey Geelong and Hockey Victoria (11% of all responses respectively).
- As a free text commentary question, common trends in answer responses were more difficult to establish.

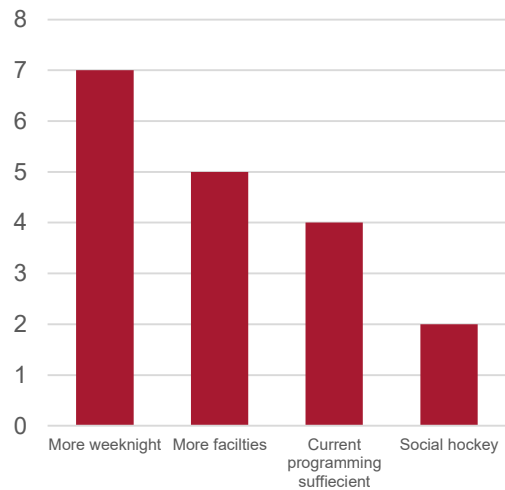
### Junior development pathways



## ACCESS AND PROGRAMMING

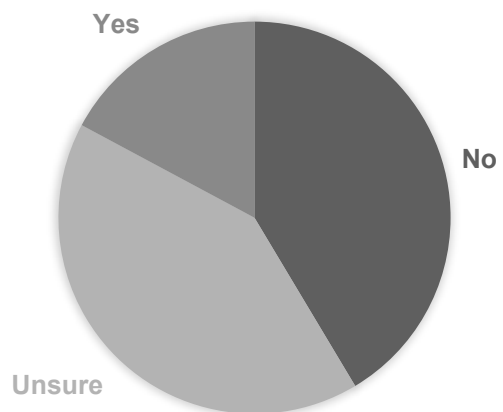
- ▶ 31 respondents provided feedback in regard to programming opportunities currently being offered within the G21 region. Of those responses, the following trends were identified:
  - ▶ 7 respondents highlighted the need for additional weeknight programming (22% of all responses).
  - ▶ 5 respondents identified the need for an additional facility within the region to conduct additional programming (16% of all responses).
  - ▶ 4 respondents stated that the current programming offering is sufficient.

### Current programming opportunities



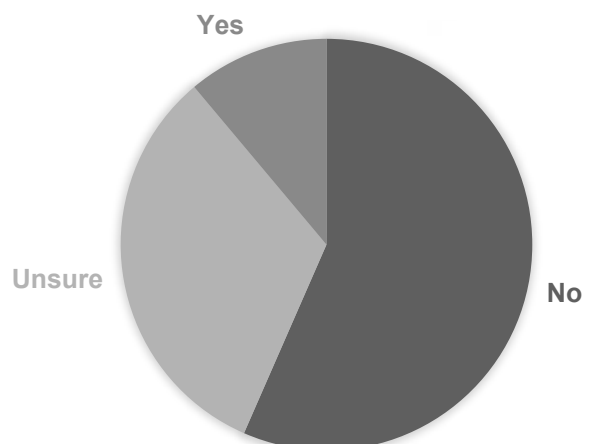
- ▶ 206 respondents provided an answer identifying their interest in participating in social hockey.
- ▶ 85 respondents stated they were unsure if they would participate in social hockey (41% of all responses).
- ▶ 85 respondents also stated that they would not participate in social hockey (41% of all responses).
- ▶ 36 respondents (18%) said they would participate in a social hockey format if offered locally.

### Interest in participating in social hockey



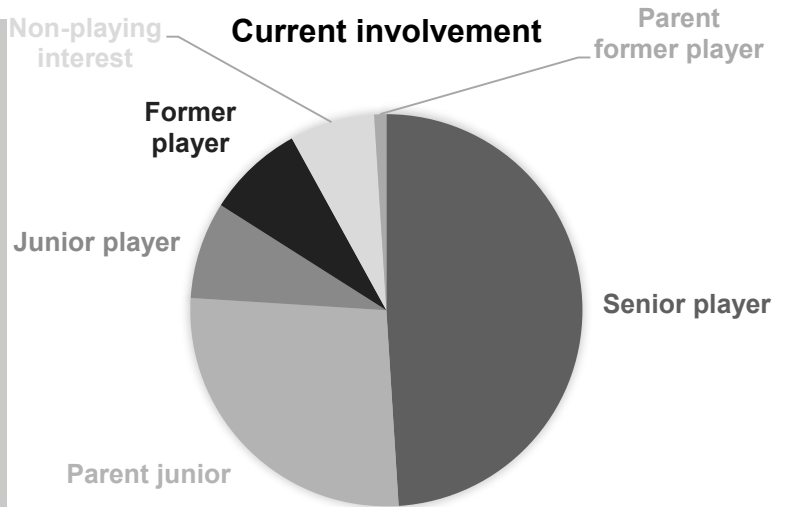
- ▶ 115 respondents stated that they would not participate in social hockey instead of regular training sessions (56%).
- ▶ 66 respondents stated that they were unsure as to whether they would participate in social hockey instead of their regular training sessions (32%).
- ▶ 23 respondents identified their support for social hockey participation over regular training sessions (11%).

### Participation in social hockey instead of regular training



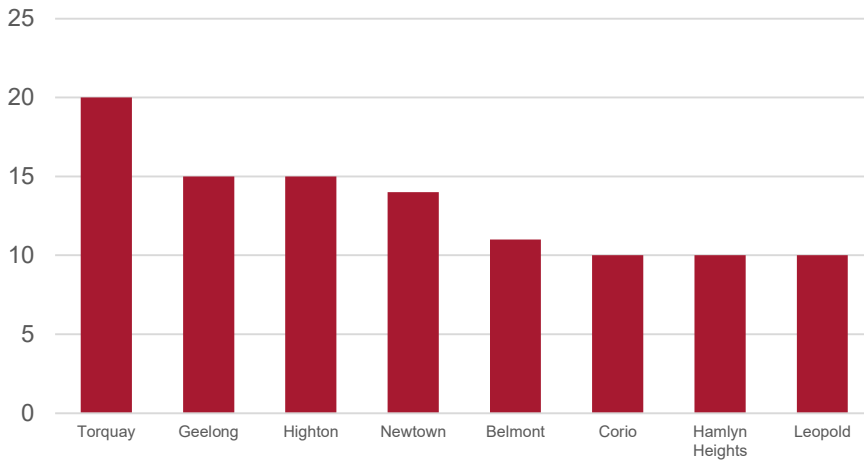
## DEMOGRAPHICS

- ▶ 244 individuals completed the online G21 Regional Hockey Strategy Participant Survey.
- ▶ 49% (119 respondents) were Current Senior Hockey Players, 27% (66 respondents) were Parents of a Current Junior Hockey Players.
- ▶ Almost half of all respondents were aged over 41 years (101 respondents). Of these, 56 were female (55%), 44 male (44%) and one respondent did not wish to reveal their gender.



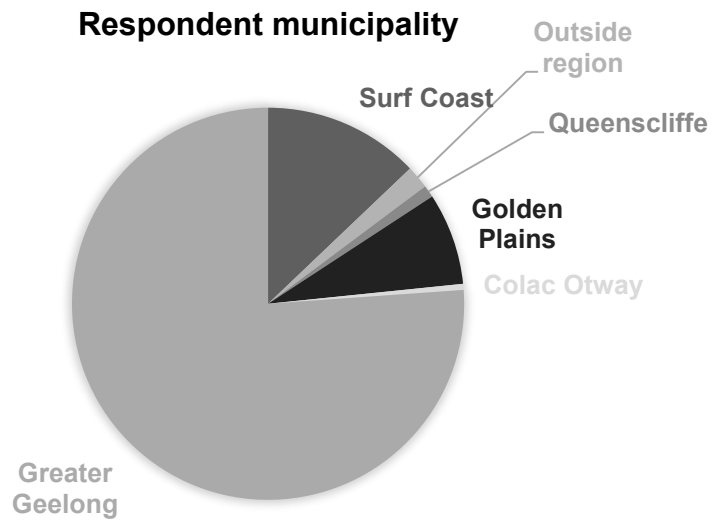
- ▶ Of the 206 individuals that supplied suburb information, 10% (20 respondents) were residents of Torquay, 21% (44 respondents) were residents of Geelong, Highton and Newtown.
- ▶ 4 respondents live outside of the G21 region with 2 residing in Ballarat and 1 in Richmond.

### Suburb of respondents



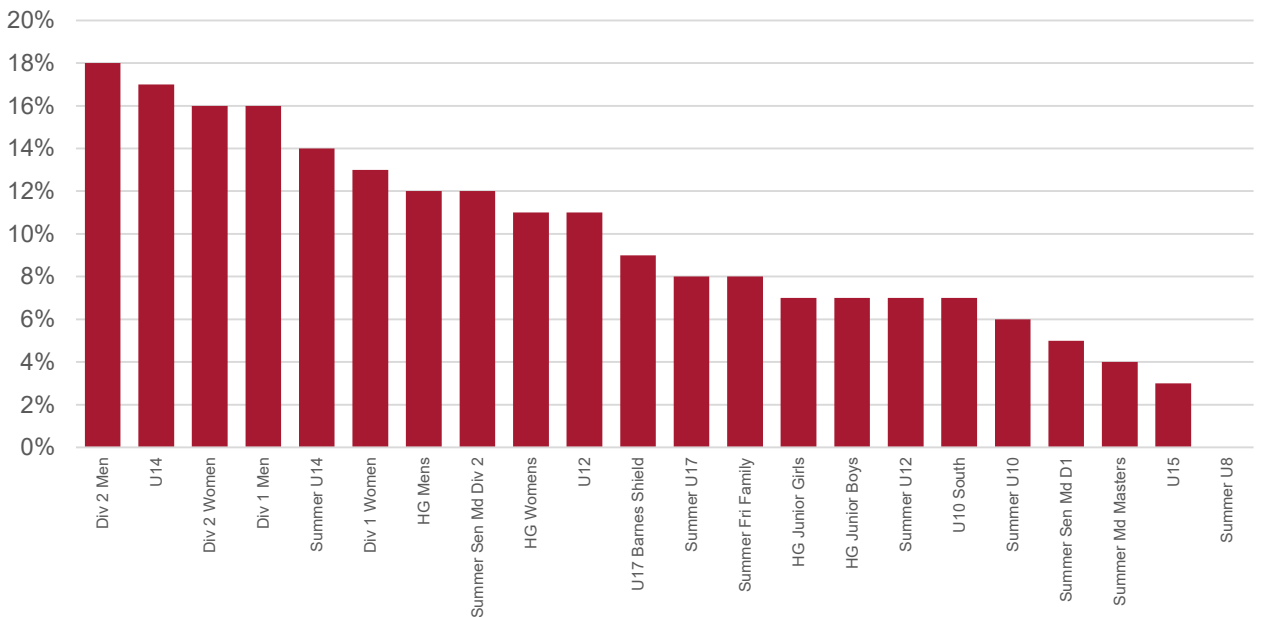
## DEMOGRAPHICS

- ▶ Of the 206 respondents that provided residential suburb information, 160 (77%) reside within the City of Greater Geelong.
- ▶ Almost 2% of all respondents reside outside of the G21 region (4 individuals).



- ▶ Of 206 individuals that provided information regarding their current competition grade:
  - ▶ 18% of respondents (37) compete in Division 2 Men's
  - ▶ 17% play Under 14's
  - ▶ And 16% compete in Division 1 Women and Division 1 Men's respectively.
- ▶ The only grade to have not had a representative respondent was the Summer Under 8's competition.

### Current competition grade





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## G21 Regional Hockey Strategy – Public Exhibition Comments on Draft (26 October – 7 December, 2018)

**NOTE:** feedback resulting in a change to the strategy is highlighted in Green under the 'Action for Strategy' column

| NO. | COMMENT   | PAGE    | Comments Summary  | Theme  | Lead LGA Comments  | ACTION FOR STRATEGY |
|-----|---|---------|---|--|--|---------------------|
| 1   | Surf Coast Shire (SCS) request following change to 2.2 wording as follows:<br><br>Undertake a detailed business case including a proposed funding model. If proven, obtain Council endorsement to seek funding for a local multipurpose synthetic competition standard hockey pitch at the Torquay Sports Precinct, in partnership with Surf Coast Secondary College. Any Council contribution will be subject to Council's budget processes.   | 34      | Change wording to state that business case must be proven, Council must endorse seeking funding, and a Council contribution must be subject to budget processes.  | NA   | To provide greater clarity.  | Update wording.     |
| 2   | With 63% of players u18, this requires parents to get kids to and from training and competition. Most other sports in our local area will train 2pw whereas due to availability of pitch and coaches at reasonable times this is not possible for hockey - 6 of our 7 family members are players. To access junior training especially at Corio this requires us to leave home at 4.30 (due to peak hour traffic through Geelong the 30 min quoted in the research is unrealistic on weekdays it is normal at least 45min) and then not return home until 9-9.30. The ground times allocated to Torquay are 5.30 for junior and 7.30 for seniors. So many senior players comment that once home from work to Torquay at 6-6.30 venturing out again for late training with travel time just doesn't happen. This means if both adults and juniors are to train our kids now age 9-14 are not getting home to bed before 9.30-10pm. Nutritious meals have to be prepared ahead of time to ensure dinner can be fitted in around training times. It is normal for either myself or my partner to miss some training sessions, we need to take 2 cars (extra \$\$\$ fuel costs) to get kids home where weather has kids wet and cold. These are all aspects that really do not come out in the report. Grass training facilities at Torquay are appalling. The area has major impact from weather and wind, poor surface for skill development- its chopped up by football boots, so therefore skill transfer to the fast, consistent pace of a synthetic field is slow. For parents who attend childrens training sessions, shelter at both venues, Corio -in particular pitch 2, and Torquay are insufficient. A pitch in Torquay would not only increase visibility, improve participation in hooked into hockey (new parents can see the quality of the facility and are more likely to get kids involved), improve training participation and therefore competition results and increasing the chances of retaining players. Many of the women players will not be able to train therefore performance drops so they stop playing. As a mum I totally get that, if we didn't have to have the kids at training, I would also train less - probably only achieved 60% training times this year. So back to the 30min travel time – it is an underestimate for the training days allocated to the club due to Geelong traffic at peak hour; it is a hindrance for seniors to going to training at 7pm on the nights where juniors are not training as getting home is pushed to 9.30-10 as the seniors train later. So a GPS time does not take into account other factors | 23      | Travel time of 30 minutes is unrealistic from Torquay at peak times.<br>Late training times for kids travelling with adults.<br>Dissatisfied with grass facility in Torquay, including shelter.<br>Support Torquay pitch. | Travel time barrier.<br>Support Torquay pitch.<br>Training times for families. | Several references in Strategy about an estimated 30 minutes travel time from Torquay (fine as is).<br>Training times for families is a valid point however chat with Peter highlights that the situation for families like this is probably as ideal as it could be (i.e. same training location, kids train earlier, etc). | None                |
| 3   | Given this facility people from Torquay will no longer have a round trip of 70 kms to play the hockey. This has been a major factor in seeing the fastest growing sporting club in Victoria 3 years ago catering for both girls and boys lose momentum.   |         | Travel time barrier – impact on sport growth.<br>Support Torquay pitch.   | Travel time barrier.<br>Support Torquay pitch.                                 | No new information   | None                |
| 4   | The Geelong region is a fast growing area that needs an alternate hockey venue on the south side of Geelong. The proposal for a hockey pitch in Torquay North is a great location, particularly for residents of Torquay, Anglesea and other coastal areas. We regularly travel from Anglesea to Stead Park in Corio for training and games. Each way is 40 minutes, which influences peoples decision to play this sport as other team sports are located in both Anglesea and Torquay.  | General | Geelong growth.<br>Support Torquay pitch.<br>Travel as a barrier.   | Travel time barrier.<br>Support Torquay pitch.                                 | Note Anglesea to Corio travel time of 40 minutes (different to response no. 1).  | None                |

| NO. | COMMENT  | PAGE    | Comments Summary  | Theme  | SCS Comments  | ACTION FOR STRATEGY |
|-----|--|---------|---|--|---|---------------------|
| 5   | I'm so excited that hockey is getting a mention, that a ground is being looked at. I know so many people that are interested in playing, but do not due to travelling to Geelong. It's great to support a sport outside football, netball, soccer, tennis and cricket.   |         | Positive response to strategy for hockey.<br>Support new facility.  | Support additional facilities.   | No new information  | None                |
| 6   | Access to facilities is the biggest deterrent to playing hockey. As a former member of Torquay Hockey Club, I stopped playing as all training and games are held in Corio, which is too far to travel to play sport at a lower level. I would definitely resume playing if there is a local facility for training and home games. My oldest child is keen to play also, but I won't let him play unless the facilities are closer to home. Hockey is a non exclusive sport, all genders, all ages, no one is excluded, so local facilities at Torquay should be a priority. Torquay Hockey Club currently has many more members than the soccer club had when the facility was built in Torquay North. | 34      | Travel time barrier – stopped playing.<br>Support Torquay pitch.<br>Hockey is an inclusive sport.<br>Comparison of membership to soccer club and facility construction.   | Travel time barrier.<br>Support Torquay pitch.   | No new information  | None                |
| 7   | We could have training times that are better suited for families instead of having split sessions and late training times in Corio. Without a pitch we have low numbers making it to training each week which can leave new players feeling unsupported by their peers.  | 11      | Training times for families.<br>Travel as a barrier – low numbers/impact on new players.  | Training times for families.<br>Travel as a barrier.   | Training times for families is a valid point however chat with Peter highlights that the situation for families like this is probably as ideal as it could be (i.e. same training location, kids train earlier, etc). | None                |
|     | It would be fantastic to have a hockey pitch in Torquay as part of a growing community and a growing hockey club. To be able to live and train locally would promote more of a club feel and would allow us to host more events and get more people to training to allow new players to practise their skills and further develop their love and enthusiasm for the game.  | 11 & 12 | Support Torquay pitch.  | Support Torquay pitch.   | No new information  | None                |
|     | With the expected growth in Torquay and the Greater Geelong shire it would be good to have games played elsewhere to allow for home games and club days. This would promote further community engagement and participation.  | 16      | Support additional facilities.<br>Support additional competition venues.  | Support additional facilities.<br>Support additional competition venues.   | No new information  | None                |
|     | Torquay Hockey Club is the only club that has gained members since 2015 but the number could decline if members need to continue to travel up to 40 minutes one way for training and games. It is not appealing for families to do multiple trips to training or to have kids out late after their junior training, therefore missing senior training sessions. It is also a long way for families to drive on the weekend when there are morning and afternoon games.   | 21      | Travel time barrier – impact on sport growth, impact on families.   | As above.  | As above.   | None                |
| 8   | The author became involved in hockey in 1977 when there was a strong promotion of the sport in Geelong through the development of junior participation and later became a player, umpire, coach and administrator with the Newtown City Hockey Club (NCHC) and other clubs from 1978 to 2001. I only ceased participation at the age of 62 for medical reasons.<br><br>Complete response submitted as an attachment.   | General | Historical information.<br>Impacts on participation and growth.<br>Population has grown but participation has fallen.<br>Necessary to have capable administrators at the clubs to support junior participation, and use of new facilities.<br>Need for facilities at KLR.<br>Questioning 2015-2017 data.<br>Stead Park function for Melbourne teams.<br>Future expenditure should be to provide sustainable development and to expand player participation. | Support synthetic pitch at King Lloyd Reserve.<br>Support additional competition venues.<br>Administrator resources. | Interesting historical information.   | None                |

| NO. | COMMENT   | PAGE    | Comments Summary  | Theme  | SCS Comments                                  | ACTION FOR STRATEGY |
|-----|---|---------|---|--|---|---------------------|
| 9   | Build a synthetic ground in TORQUAY   | General | Support Torquay pitch.  | Support Torquay pitch.   | No new information                            | None                |
| 10  | Both of my daughters have played hockey with Torquay Hockey Club since the club was established in 2010. Hockey is a great sport for young girls as it helps them be engaged within the community and be physically active. Unfortunately neither of the girls can play on a consistent basis due to travel time. If a ground is developed in Torquay it would greatly help the girls have access to hockey facilities and engage with the sport. As a family we therefore support recommendation 2.2 in the G21 Regional Hockey Strategy.  | 34      | Great sport for girls.<br>Travel time as a barrier.<br>Support Torquay pitch.   | Travel time as a barrier.<br>Support Torquay pitch.  | No new information                            | None                |
| 11  | Definitely need to consider more hockey facilities in the region. Recently moved to Geelong from Melbourne and amazed that only 2 turfs for senior hockey and out in Corio! Not particularly near much of the growth areas of Geelong. Would support a turf at King Lloyd reserve. Close to the suburbs, schools and central Geelong.   |         | Support additional facilities.  | Support additional facilities.   | No new information                            | None                |
|     | Also think that there needs to be more investment in multiple turfs, even if clubs need to help co-fund or share facilities.<br>Torquay and possibly Deakin Uni would also be logical locations to spread out the facilities across the region.   |         | Support Torquay pitch, suggests Deakin as possible location   | Support Torquay pitch.   | No new information                            | None                |
| 12  | This is my opinion only is that more clubs in Geelong need to be doing more in their club or ask for help to get more members including juniors to grow the competition in Geelong. The more people in the clubs the more hockey will grow. You just cannot leave it up to the same people I have helped and I know it left to the same old people. I have seen it from both sides of the fence as player and administrator that only a few people will commit to this but if more people commit the better the club will be. I think that if you have a synthetic field at Torquay and Newtown City Hockey Club then that means more people can get to playing at these venues the bigger hockey Geelong will get. But it is going to take time. | General | Need for clubs to encourage junior participation.<br>Limited human resources.<br>Support Torquay pitch.<br>Support synthetic pitch at King Lloyd Reserve.   | Administrator resources.<br>Support Torquay pitch.<br>Support synthetic pitch at King Lloyd Reserve. | No new information                            | None                |
| 13  | Synthetic turf at King Lloyd Reserve would be a great idea to enable training at the pitch for junior and senior teams. It would allow our son to be able to get himself to training rather than relying on his parents whom both work full time trying to juggle running the household/work and activities driving him to Stead Park three times a week.   | 11      | Support synthetic pitch at King Lloyd Reserve.  | Support synthetic pitch at King Lloyd Reserve.   | No new information                            | None                |
| 14  | A full synthetic field at Lloyd's Reserve is essential for the further development of hockey in Geelong. Not only for training, but also to play games. Half a field costs a lot of money as well, but will give less than 50% of the opportunities than a full field. A synthetic field is also important for the further development of hockey in the Surf Coast. Not critical, but just as important as a synthetic pitch in Newtown. The more synthetic fields in our region, the more we can develop hockey together! Relating to Page: About synthetic fields in both Newtown and Torquay.  | General | Support synthetic pitch at King Lloyd Reserve.<br>Support Torquay pitch.  | Support synthetic pitch at King Lloyd Reserve.<br>Support Torquay pitch.                             | No new information                            | None                |
| 15  | The Torquay Hockey Club Committee discussed the G21 Hockey Strategy and our feedback is attached in the PDF document attached.<br><br>The Torquay Hockey Club strongly supports recommendation 2.2 and that it has been identified as a critical priority.<br><br>Complete response submitted as an attachment.   | Various | Pleased with focus on participation.<br>Growth limited by travel.<br>Support findings and recommendations.<br>Only club to take up J-Ball.<br>Strong support for 2.2.<br>Also support 3.1, 4.1 and 4.2. | Focus on participation.<br>Travel time as a barrier.<br>Support Torquay pitch.                       | Positive club response.<br>No new information | None                |

| NO. | COMMENT  | PAGE | Comments Summary  | Theme  | SCS Comments  | ACTION FOR STRATEGY |
|-----|--|------|---|--|---|---------------------|
| 16  | <p>During my working years I rose to be the senior Facility Planning Consultant for the [REDACTED] agency. In my latter years there I wrote the substantial planning manual called 'Artificial Grass for Sport' (published 2011).</p> <p>Complete response submitted as an attachment.</p>   |      | <p>Has experience in sport planning.</p> <p>Has reviewed strategic documents (commends work).</p> <p>Has been critical of hockey's administrators re: not supporting facilities in growth areas.</p> <p>Support Torquay pitch.</p> <p>Suggests that a Torquay pitch could be deemed regional (given distance between Corio and Torquay).</p>  | Support Torquay pitch.   | No new information  | None                |
| 17  | <p>The Newtown City Hockey Club and its members strongly support the need for a Regional Hockey Strategy to ensure the continuing development and growth of hockey in Geelong and the G21 region. The Club strongly supports the Strategic Priorities noted in the draft document.</p> <p>Complete response submitted as an attachment.</p>  |      | <p>Support for document.</p> <p>Lack of synthetic and lighting at KLR.</p> <p>Travel as a barrier.</p> <p>Significant use impacts on grass surface in winter.</p> <p>KLR not accessible in summer due to other sports.</p> <p>Club has hired an area adjacent to KLR for summer programs.</p> <p>Access road to KLR a problem.</p> <p>Pavilion is an advantage.</p> <p>Geelong College and Grammar facilities have limitations, and the schools had to hire Stead Park on occasions in 2018.</p> <p>Support for synthetic at KLR.</p> <p>Golden Plains – lack of facility.</p> <p>Torquay pitch would benefit 17% of total participants – not the majority.</p> <p>Synthetic at KLR would assist the Club.</p> <p>Club initiatives.</p> <p>Support Hockey Geelong to produce a business plan and appoint personnel.</p> <p>Support Regional Development Officer.</p> <p>Comments on social formats.</p> <p>Clubs are volunteer run.</p> | <p>Travel time as a barrier.</p> <p>Support synthetic pitch at King Lloyd Reserve.</p> <p>Administrator resources.</p> | Some additional information of note.  | None                |
| 18  | <p>With the forecast growth of City of Geelong, would it not be better to invest in a facility in Armstrong creek, and have both a north centre (stead park) and a south centre (armstrong creek). There seems to be a massive push for a synthetic surface at Torquay, but this should be a local priority. Having a synthetic surface for games across the region is not financially sustainable. Additionally, is there thought around adding a 3rd pitch to Stead park? There is space out the back.</p> | 16   | <p>Suggests investing in Armstrong Creek facility.</p> <p>Notes push for Torquay and that it should be a local priority.</p> <p>Suggests a third pitch at Stead Park.</p>   | Supports Armstrong Creek facility.   | Note suggestion for additional pitch at Stead Park (doesn't assist with travel issues for all clubs). | None                |

| NO. | COMMENT   | PAGE   | Comments Summary                     | Theme | SCS Comments  | ACTION FOR STRATEGY          |
|-----|---|--------|--------------------------------------|-------|---|------------------------------|
| 19  | <p>My essential point was the document talks of approx 1130 participants in the study area. This is probably roughly true. This comes about I think from the method of collection of data believed to be from the registration system for hockey participants. Accordingly only players and officials (maybe) are captured as participants. This does not capture supporters including parents, grandparents, siblings and others.</p> <p>The effect:.....</p> <p>After proudly telling Council staff and other people that we had the number of participants we had my tyres were let down by a Council officer who informed me that he could show me football CLUBS that had more members than our ASSOCIATION total. There is no way these people are all players or even non playing officials. If they were and this was repeated across multiple football clubs we could not build enough ovals to meet their needs! This is certainly not the case.</p> <p>The issue seems to be social members who generally watch matches and contribute to Clubs through canteen sales. They do not actively participate</p> <p>I believe a multiplier should be applied to the number of participants in the sport of hockey. It would not be unreasonable to multiply by four i.e. 3 supporters of actual participants for each active player. [REDACTED]</p> | 18, 21 | Query on data (players / membership) | NA    | <p>The strategy is clear on page 18 that the data is for participants. We do note on page 21 though that it refers to 'membership' (first para, 7th para, 8th para, 10th para, under table,). SCS suggest that these should all be changed to 'players'.</p> <p>SCS also suggest that page 21 include a note under the table: "The data accounts for player numbers only, and does not include secondary participation in hockey by club officials, spectators and social members".</p> | Update wording as suggested. |

## **7. GREATER GEELONG AND THE BELLARINE TOURISM DEVELOPMENT PLAN**

**Source:** Economy, Investment & Attraction - Tourism  
**Director:** Brett Luxford  
**Portfolio:** Tourism and Events

### **Purpose**

1. To update Council on the findings of the Greater Geelong and the Bellarine Tourism Development Plan - Final Report 2019-22 (**Attachment 2 Tourism Development Plan**) including current and projected visitor demand and the listing of priority projects required to maximise the output of the visitor economy until 2027.

### **Background**

2. The Tourism Development Plan was developed by Consultants, Urban Enterprise, and builds on the 2015-18 Tourism Development Plan.
3. The performance of the tourism sector has been stronger than that predicted in the previous plan and several of the identified priority projects have been realised. The aim of the updated plan is to identify key tourism products and supporting infrastructure which will meet the needs of existing and future visitors to the region.

### **Key Matters**

4. Current visitation to the region now exceeds 5.8 million visitors per annum with an estimated \$2.2 billion economic value supporting 11,264 jobs.
5. Based on demand modelling, future visitation is projected to increase to 7.5 million by 2027.
6. There will be a need to deliver an additional 1,564 guest rooms in the Geelong and The Bellarine region to ensure that the region's tourism potential is met.
7. The Tourism Development Plan details the priority projects required to maximise the visitor economy and list these projects by six sub regions, Urban Geelong, Avalon and the You Yangs, Bellarine South, Bellarine North, Queenscliff and Point Lonsdale and Golden Plains South.

**Cr Murrhiy moved, Cr Nelson seconded -**

### **8. That Council:**

- 8.1 **Note the current performance of the Geelong and The Bellarine visitor economy and the projected growth in visitation over the next eight to ten years, and**
- 8.2 **Acknowledge the priority projects as detailed in the Greater Geelong and the Bellarine Tourism Development Plan - Final Report 2019-22 and continues to work in partnership with the tourism industry and private sector operators through Tourism Greater Geelong and The Bellarine and State and Federal Governments to realise these projects over the life of the plan.**

**Carried.**

## **Attachment 1**

### ***Financial Implications***

1. The City's primary role is one of facilitation rather than being a direct provider of tourism related infrastructure.
2. Specific projects that have been identified in the Tourism Development Plan where Council is a funding partner (Convention and Exhibition Centre, Osborne Park redevelopment, Eastern Beach Spa Complex and Sunken Gallery etc.) are subject to Council's budget program and processes.

### ***Community Engagement***

3. The consultants, in developing the Tourism Development Plan, met with a wide range of potential investors, Committees of Management and relevant State and Federal Government departments and agencies. Industry forums were conducted at a sub-regional level and local plans and strategies were considered and noted.

### ***Social Equity Considerations***

4. Tourism is about capitalising on the region's competitive advantages and is primarily about economic activity. The region's Visitor Economy Strategy 2017 – 2021 lists Accessible Tourism as a key priority and significant opportunity.
5. A partnership has been established with the Australian Federation of Disability Organisations and Deakin University to work with the industry and developers to support the key objective.
6. Tourism is a labour intensive industry with a very broad entry level. Research of the local labour force highlights a significant number of workers that work directly and indirectly benefit from a growing visitor economy.

### ***Policy/Legal/Statutory Implications***

7. The Tourism Development Plan is consistent with Council's Tourism Policy (approved 10 April 2018) that recognises that the visitor economy is one of the sectors within the broader Grater Geelong economy which can sustain economic growth and be further developed, enhanced and expanded.
8. The policy highlights that Council will continue to work with industry to maximise employment and the long term economic benefits of tourism.
9. The policy goes on to say that in order to achieve these goals and objectives, Council will:
  - 9.1 Facilitate the creation of tourism opportunities and development of tourism infrastructure while minimising its role as a direct infrastructure funder; and
  - 9.2 Actively seek State and Federal support of conferencing and other tourism related infrastructure.
10. The Tourism Development Plan and associated marketing tools is the major advocacy and support document presented to Government and quasi Government agencies, peak industry bodies and regional development boards to seek to focus and strengthen the funding of key projects within the region.

***Alignment to Council Plan***

11. The Council Plan 2018-22 states that “tourism is one of the five sectors to secure Geelong’s economic future”. Tourism plans and strategies being developed will assist in “delivering and growing our economic priorities.”
12. Further to this, the Council Plan states that a priority is to facilitate major infrastructure and investment to enable economic growth. We will facilitate the provision of appropriate infrastructure to enable economic growth and capitalise on competitive advantage by proactively targeting and attracting new investment to Geelong and promoting our region’s benefits.
13. A priority for Greater Geelong is to be a leading city for tourism, arts, culture and events (the visitor economy).

***Conflict of Interest***

14. This report is written by the City’s Tourism Manager who is also the Executive Director of the Regional Tourism Board, Tourism Greater Geelong and The Bellarine Inc.
15. The Tourism Development Plan was commissioned and paid for by Tourism Greater Geelong and The Bellarine Inc.
16. The Tourism Development Plan is subject to copyright and is an independent report of Urban Enterprise (Urban Planning, Land Economics, Tourism Planning and Industry Software).
17. The Tourism Development Plan has been considered by the Board of Tourism Greater Geelong and The Bellarine who resolved to accept the plan.

***Risk Assessment***

18. Greater Geelong and The Bellarine is one of 12 official tourism regions of Victoria. Other regions also recognise the importance of growing the visitor economy and working in partnership with industry, all levels of Government and the private sector.
19. Tourism Greater Geelong and The Bellarine continues to perform strongly and has had a long track record of excellence and is recognised as a best practice example nationally and globally.
20. Regions in Victoria and right across Australia continue to invest heavily in tourism infrastructure development and marketing. Regions who fail to invest can experience rapid decline in both visitation and yield.
21. The risk for Greater Geelong and The Bellarine is that the Tourism Development Plan priority projects fail to be realised with subsequent decline in destination appeal, visitation, visitor expenditure and associated employment in the visitor economy.

***Environmental Implications***

22. The tourism industry is a significant consumer of energy, water and a generator of waste and emissions. In recognition of this the industry has established a number of environmental programs to reduce impact on the environment.

23. Environmental credentials are now an important consideration by visitors and the industry has responded to the demands of the market and introduced new environmentally responsible practices to reduce their impact on environment and improve their bottom line. Tourism Greater Geelong and The Bellarine is an active participant in the Earth Check program and benchmarked against global environmental best practice targets for energy consumption and waste generation.
24. Tourism Greater Geelong and The Bellarine organise industry forums for members to hear and learn from environmental organisations and program leaders aiming minimise environmental impact.

# GREATER GEELONG AND THE BELLARINE TOURISM DEVELOPMENT PLAN

DRAFT REPORT 2019-22

FEBRUARY 2019

TOURISM GREATER GEELONG & THE BELLARINE

Urban Enterprise Urban Planning / Land Economics / Tourism Planning / Industry Software

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## ACRONYMS

**IVS** – International Visitor Survey

**LGA** – Local Government Authority

**NVS** – National Visitor Survey

**TRA**– Tourism Research Australia

**VFR** – Visiting Friends and Relatives

## GLOSSARY OF TERMS

**Domestic day trip visitors** – Those who travel for a round trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

**Domestic overnight visitors** – People aged 15 years and over who undertake an overnight trip of one night or more, and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

**International visitor** – A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia for less than one year and are aged 15 years or over.

# EXECUTIVE SUMMARY

## INTRODUCTION

Urban Enterprise was commissioned by *Tourism Greater Geelong & The Bellarine* to undertake the Greater Geelong and The Bellarine Tourism Development Plan 2019-22. This report builds on the 2015-18 tourism development plan. The aim of the plan is to identify key tourism product and supporting infrastructure which will meet the needs of existing and future visitors to the region. The projects that are identified in this plan will support tourism and economic growth in the region.

## THE REGION

Greater Geelong and the Bellarine is located to the south west of Melbourne and includes the Local Government Areas of Greater Geelong, Borough of Queenscliffe and part of Golden Plains Shire. The region is contributed of diverse tourism product and experiences across various Greater Geelong and Bellarine subregions:

- Geelong Urban;
- Avalon and the You Yangs;
- Golden Plains South;
- Bellarine North;
- Bellarine South;
- Queenscliff and Point Lonsdale.

Greater Geelong and the Bellarine is also strategically located in proximity to other key Victorian destinations including links to the Mornington Peninsula via the Queenscliff Sorrento Ferry, Surf Coast and the Great Ocean Road. The development of Avalon International Airport will strengthen the attraction of international visitors and make the region a key hub for exploring Victoria's tourism offer.

## TOURISM PROFILE

| Visitation           | Economic Value of Tourism Industry (Output) | Jobs Attributed to Tourism Industry |
|----------------------|---|-------------------------------------|
| 5.8 million visitors | \$2.2 Billion                               | 11,264                              |

The Greater Geelong and the Bellarine region attracted 5.8 million visitors in 2018, comprised of 2.3 million overnight visitors and 3.5 million daytrip visitors.

Over 50% of visitation is to the Geelong Urban subregion, with 77% of visitors to Geelong Urban visiting for a daytrip. This is likely due to a large number of people visiting for business, shopping, healthcare and friends and relatives.

The region is dominated by day trip visitors, due to the proximity to Melbourne. Lower proportions of overnight visitors to the Avalon & the You Yangs, Golden Plains South and Geelong Urban regions are likely due to a combination of factors, including limited accommodation product, large visiting business market and large VFR market.

Over the past 10 years, overnight visitation to the Geelong and Golden Plains South region has continued to grow, while overnight trip visitation to the Bellarine Peninsula has had very limited growth. This could be due to conversion of holiday homes to permanent dwellings, competition from other beachside destinations like Mornington Peninsula and the Surf Coast, and a lack of investment in accommodation.

Tourism provides a significant contribution to the regional economy, calculated by visitor expenditure. Overall, visitor expenditure (estimated at \$1.1 billion) generates substantial economic benefits for the Greater Geelong and Bellarine Region including economic output of \$2.2 billion and 11,264 jobs.

## MARKET PROFILE

99% of visitors to the Greater Geelong and The Bellarine region are from Victoria, with 71% of these visitors from Melbourne.

Domestic visitation to the Bellarine is much more seasonal than visitation to Geelong and Golden Plains South, likely due to a larger holiday visitor market and lower VFR market.

There is a significantly higher proportion of people staying with friends and relatives in the Greater Geelong and The Bellarine region than other similar coastal locations. Similarly, there is a much higher proportion of people travelling for the purpose of visiting friends and relatives. This is influenced by the large resident population in the region.

A higher proportion of visitors ate out at a restaurant/café than competing coastal destinations and visitors to regional Victoria. Similarly, a higher proportion of visitors took part in paid experiences/activities (e.g. shopping, visiting markets) than similar coastal destinations and Regional Victoria.

75% of visitors to the Bellarine Peninsula went to the beach, which is significantly higher than visitors to similar coastal regions. This also highlights the need for continued diversification of product in the region including investment in nature based tourism experiences, food, wine and ferments product.

International visitors are a key, growing market for the region, with international students and their visiting family and friends a key market segment. There is significant opportunity to better promote the region to these visitors, as well as opportunity to capture international travellers inbound to Avalon Airport and convert them into daytrip or overnight visitors.

Key target markets for the Greater Geelong and The Bellarine region are the lifestyle leader and MetroTech markets, as well as the traditional family life.

## PRODUCT AND TOURISM DEVELOPMENT

Greater Geelong and The Bellarine has primary strengths in nature-based attractions. These attractions are 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, particularly in the peak summer season.

The other area of primary strength is in events and festivals with Geelong hosting numerous sporting and recreation events, some of global significance. The Australian International Air show, Cadel Evans Great Ocean Road Race and Meredith Music Festival are examples of high-profile events held in 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 that has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN).

There is limited hotel/motel style accommodation in Geelong Urban for the events market (business, sporting and food). Development of 4-5-star quality accommodation is a key opportunity for Geelong Urban and will support the proposed investment in the Geelong Convention and Exhibition Centre.

There is very limited commercial guestroom accommodation in Bellarine North and Bellarine South (20% and 34% respectively). This presents a strong opportunity to grow overnight visitation in the region.

Key new investments since 2015 include development of Avalon international air terminal, Flying Brick Cider Co, Curlewis Golf Club redevelopment including the Range, 360Q restaurant and several small high-end boutique accommodation offers. Further to this, the QTrain and several high-end profile restaurants have strengthened the regions food and beverage offering.

## TRANSPORT AND ACCESS

The Greater Geelong and The Bellarine region is well serviced by a range of transport infrastructure. The region is accessible by air, sea, rail and road.

There are however a number of gaps in the transport links and improvements that require investment to improve visitor access and potentially grow visitation to the region. This includes:

- Investment in rail linkages to Avalon Airport and attraction of further international carriers;

- High-speed rail proposals;
- Completion of Portarlington Harbour redevelopment; and
- Investment in the Queenscliff – Sorrento Ferry terminal.

### PRODUCT STRENGTHS OF GEELONG AND THE BELLARINE

In the following table, product strengths for Greater Geelong and the Bellarine region have been identified and benchmarked against similar coastal locations.

| PRODUCT            | GEELONG & THE BELLARINE | MORNINGTON PENINSULA | PHILLIP ISLAND | SURF COAST |
|--------------------|-------------------------|----------------------|----------------|------------|
| Food & Wine        | ●                       | ●                    | ●              | ●          |
| Spa & Wellbeing    | ●                       | ●                    |                | ●          |
| Wildlife           | ●                       | ●                    | ●              | ●          |
| Nature-based       | ●                       | ●                    | ●              | ●          |
| Arts & Culture     | ●                       | ●                    |                |            |
| Indigenous         |                         |                      |                | ●          |
| Golf               | ●                       | ●                    |                | ●          |
| Adventure          |                         |                      |                | ●          |
| History & Heritage | ●                       |                      |                | ●          |
| Festivals & Events | ●                       | ●                    | ●              | ●          |
| Business Events    | ●                       | ●                    | ●              |            |

● PRIMARY   
 ● SECONDARY   
 ● EMERGING

### PROJECTED VISITATION GROWTH AND DEMAND FOR ACCOMMODATION

Urban Enterprises demand modelling for future visitation utilises four scenarios including, historic visitation, Visit Victoria forecasting, population growth rate and Tourism Research Australia forecasts. The mid-point forecast of these scenarios shows that visitation to Greater Geelong and the Bellarine is projected to increase from 5.8 million visitors in 2018 to 7.5 million visitors by 2027.

Utilising this forecast, there will be a need to deliver an additional 1564 guest rooms in the Geelong and Bellarine region to ensure that the region’s tourism potential is met.

To meet projected need from overnight visitors investment in accommodation should occur in the following:

- Boutique guest house and self-contained accommodation
- Quality contemporary budget accommodation
- Large self-contained accommodation/ serviced apartments
- Boutique hotels
- 4.5-5 star branded hotels
- Caravan and camping ground/tourist park
- Integrated Resort
- Experiential accommodation:
  - Quality Farm Stay
  - Golf Course
  - Wineries
  - Nature-based

**GREATER GEELONG AND THE BELLARINE PRIORITY TIER 1 PROJECTS**

| Geelong Urban  | Queenscliff and Point Lonsdale   | Bellarine South  | Bellarine North   | Golden Plains South   | Avalon and the You Yangs  |
|--|--|--|---|---|---|
| <p>Geelong Convention and Exhibition Centre</p> <p>Waterfront Geelong – Safe Harbour Precinct</p> <p>Fast rail to Geelong</p> <p>Cruise ship infrastructure (Cunningham Pier)</p> <p>Osborne Park Precinct redevelopment</p> <p>Geelong Cultural Precinct redevelopment (boutique hotel)</p> <p>GMHBA/Kardinia Park Redevelopment (hotel development)</p> <p>Development of Eastern Beach spa complex</p> <p>Skyrig Adventure Park</p> <p>4-5 star large branded hotel accommodation</p> <p>Contemporary experiential accommodation.</p> <p>Geelong Port Phillip Ferry Service</p> | <p>Borough of Queenscliffe investment into Tracks and Trails</p> <p>Borough of Queenscliffe foreshore improvements</p> <p>Hesse Street revitalisation</p> <p>Development of Fort Queenscliff</p> <p>Ferry terminal upgrade</p> <p>Bellarine Railway Masterplan</p> <p>Events/Culture</p> | <p>Barwon River parklands project</p> <p>Lake Connewarre nature-based tourism masterplan</p> <p>Barwon coast masterplans</p> <p>Barwon coast trail</p> <p>Barwon Coast group accommodation project</p> <p>Off-peak events program</p> <p>Nature-based resort development</p> | <p>Portarlington Safe Harbour (incl. precinct development)</p> <p>Underwater Dive Gallery – ‘Sunken Gallery’</p> <p>Aquaculture experiences</p> <p>Development of large resort at Curlewis golf club</p> <p>Development of self-contained apartment/hotel accommodation at Portarlington</p> <p>Development of branded tourist parks</p> <p>Development of new experiential accommodation</p> <p>Wellness centre with accommodation</p> | <p>Reticulated Sewerage Investment</p> <p>Lethbridge Airport</p> <p>Telecommunications infrastructure</p> <p>Grow the Moorabool Valley Taste Trail</p> <p>Bannockburn Civic Heart project</p> <p>Living Moorabool Trail</p> | <p>Avalon Airport rail link</p> <p>Implementation of Avalon Airport Masterplan</p> <p>Development of accommodation at Avalon Airport.</p> <p>You Yang’s/Serendip Masterplan</p> |

# 1. INTRODUCTION

## 1.1. BACKGROUND

Urban Enterprise was commissioned by *Tourism Greater Geelong & The Bellarine* to undertake the Greater Geelong and The Bellarine Tourism Development Plan 2019-22. This report builds on the 2015-18 tourism development plan.

The Tourism Development Plan 2019-22 will deliver the following:

- Identification of existing and potential target markets, quantification of those markets and projection of key markets into the future;
- Identification of the economic value of tourism in the region;
- Audit of tourism product, experience and infrastructure in the region and identification of gaps to meet market need;
- Analysis of specific tourism opportunities, constraints and visitor experience at a sub region or destination level; and
- Identifying tourism product and infrastructure needs by location to be incorporated into future strategic planning and planning policy.

## 1.2. APPROACH



### STAGE 1: PROJECT INCEPTION AND BACKGROUND

At the outset of the project, Urban Enterprise undertook an inception meeting and review of relevant information and strategies. This included agreement on the scope of works and consultation strategy.

### STAGE 2: DETAILED VISITOR MARKET ANALYSIS

Urban Enterprise undertook an assessment of visitation trends and visitor profiles for Greater Geelong and The Bellarine region, drawing on data collected from Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS). Urban Enterprise's PAVE model has been used to estimate total region visitation, which better accounts for visitation driven by the holiday home sector than traditional National and International Visitor Survey data.

Trend and demographic data for domestic visitors and overnight international visitors to the region provided insights on visitor market trends and preferences across the region and enabled the analysis of the visitor market profile matched to the identified target market segments and tourism product/infrastructure opportunities.

### STAGE 3: CONSULTATION

To gather an understanding of the issues and opportunities within the region, as well as within each locality, Urban Enterprise undertook a series of consultations relevant stakeholders, whose input informed this study.

Consultations took place with Greater Geelong City Council, Golden Plains Shire, Borough of Queenscliffe, Regional Development Victoria and a selection of stakeholders to inform the plan.

#### STAGE 4: PRODUCT AND EXPERIENCE UPDATE

Compiling a comprehensive database of tourism businesses, organisations and attractions across the region, Urban Enterprise's product audits enabled the identification of product strengths, gaps, constraints and development opportunities for the region.

Product categories analysed included: accommodation, natural attractions, history and heritage attractions, tours, farm gate produce, wineries, golf and recreation, infrastructure, arts, and culture, events and festivals, conference facilities, and destination dining venues and experiences.

The product audit also enabled identification of six destination sub-regions, including Urban Geelong, Avalon and the You Yangs, Golden Plains South, Bellarine South, Bellarine North, and Queenscliff and Point Lonsdale, each offering different product strengths. The sub-regions were designed to be compatible with the Australian Bureau of Statistic's SA2 boundaries and are shown in the adjacent map.

#### STAGE 5: REPORT PHASE

The Tourism Development Plan has been prepared drawing on research and consultation as outlined above.

### 1.3. THE REGION

Greater Geelong and the Bellarine is located to the south west of Melbourne and includes the Local Government Areas of Greater Geelong, Borough of Queenscliff and part of Golden Plains Shire. The region is contributed of diverse tourism product and experiences across various Greater Geelong and Bellarine subregions:

- Geelong Urban;
- Avalon and the You Yangs;
- Golden Plains South;
- Bellarine North;
- Bellarine South;
- Queenscliff and Point Lonsdale.

These are shown in Figure 1 on the following page.

Greater Geelong and the Bellarine is also strategically located in proximity to other key Victorian destinations including links to the Mornington Peninsula via the Queenscliff Sorrento Ferry, Surf Coast and the Great Ocean Road. The development of Avalon International Airport will strengthen the attraction of international visitors and make the region a key hub for exploring Victoria's tourism offer.









### 1.4. REPORT STRUCTURE

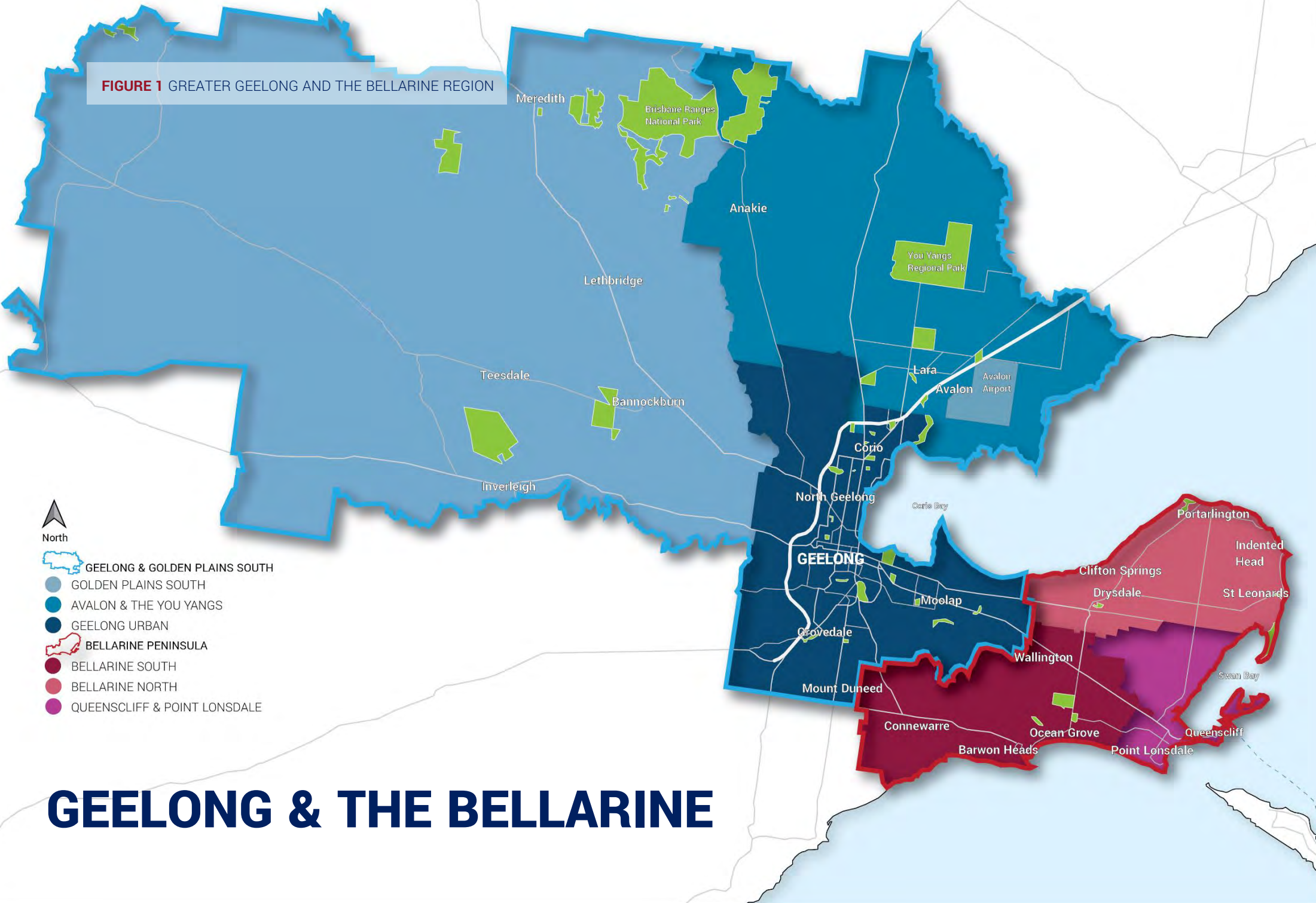
This report has been prepared in the following sections:

- Part A: Regional Tourism Assessment: A profile of visitation and product in the region;
- Part B: Sub Regional Profiles: Profiles of each sub region and product opportunities for each; and
- Part C: Prioritisation and Project Profiles.

**FIGURE 1** GREATER GEELONG AND THE BELLARINE REGION



-  GEELONG & GOLDEN PLAINS SOUTH
-  GOLDEN PLAINS SOUTH
-  AVALON & THE YOU YANGS
-  GEELONG URBAN
-  BELLARINE PENINSULA
-  BELLARINE SOUTH
-  BELLARINE NORTH
-  QUEENSCLIFF & POINT LONSDALE



# GEELONG & THE BELLARINE



# **PART A** **REGIONAL TOURISM ASSESSMENT**

## 2. PROFILE OF TOURISM IN GREATER GEELONG AND THE BELLARINE

### 2.1. INTRODUCTION

This section provides a profile of tourism visitation to Greater Geelong and The Bellarine region, including daytrip visitation and domestic and international overnight visitation, trend analysis, forecasted visitation for the region, and a discussion on the economic impact of tourism to the region.

Total region visitation data has been prepared using Urban Enterprises PAVE model which better accounts for visitation driven by the holiday home sector than traditional NVS and IVS data. See Appendix A for further detail on the PAVE model.

For data analysis purposes, the Greater Geelong and the Bellarine region has been split into two regions; Geelong and Golden Plains South (including Avalon), and the Bellarine Peninsula. This is both to increase reliability of data due to the low visitation sample size of Golden Plains South and Avalon and the You Yangs, and because of the similarity in product and experience profile of the destinations within each region.

### 2.2. KEY FINDINGS

| Visitation           | Economic Tourism (Output) | Value of Industry | Jobs Attributed to Tourism Industry |
|----------------------|---------------------------|-------------------|-------------------------------------|
| 5.8 million visitors | \$2.2 Billion             |                   | 11,264                              |

**The Greater Geelong and the Bellarine region attracted 5.8 million visitors in 2018, comprised of 2.3 million overnight visitors and 3.5 million daytrip visitors.**

**Over 50% of visitation is to the Geelong Urban subregion, with 77% of visitors to Geelong Urban visiting for a daytrip. This is likely due to a large number of people visiting for business, shopping, healthcare and friends and relatives.**

**The region is dominated by day trip visitors, due to the proximity to Melbourne. Lower proportions of overnight visitors to the Avalon & the You Yangs, Golden Plains South and Geelong Urban regions are likely due to a combination of factors, including limited accommodation product, large visiting business market and large VFR market.**

**Over the past 10 years, overnight visitation to the Geelong and Golden Plains South region has continued to grow, while overnight trip visitation to the Bellarine Peninsula has had very limited growth. This could be due to conversion of holiday homes to permanent dwellings, competition from other beachside destinations like Mornington Peninsula and the Surf Coast, and a lack of investment in accommodation.**

**Tourism provides a significant contribution to the regional economy, calculated by visitor expenditure. Currently, visitor expenditure (estimated at \$1.1 billion) generates substantial economic benefits for the Greater Geelong and Bellarine Region including economic output of \$2.2 billion and 11,264 jobs.**

As visitation grows over time, the economic impact is expected to increase accordingly. By 2027, visitation is projected to increase to 7.5 million, generating \$1.7 billion in visitor expenditure. This is estimated to increase the economic impact for the Region, with economic output projected at \$3.3 billion and job creation projected at 17,256.

### 2.3. VISITATION

Urban Enterprise’s PAVE model for tourism visitation estimates that Greater Geelong and the Bellarine region attracted over 5.8 million visitors in 2018, including 3.5 million daytrip visitors and 2.3 million overnight visitors.

The Geelong Urban subregion had the highest total visitation across the region, with an estimated 3 million visitors. This was driven by the significantly larger daytrip market than the other subregions.

Geelong Urban also had the greatest overnight visitation for the region, at 659,406 overnight visitors. The overnight visitor market was also strong in Bellarine North, with 566,741 overnight visitors, and Bellarine South, with 574,099 overnight visitors.

It should be noted that arrivals and departures at Avalon Airport are not accounted for in the Avalon/You Yangs sub region.

**TABLE 1** PAVE VISITATION NUMBER

| VISITATION ESTIMATES - PAVE MODEL                      | VISITATION       |
|--|------------------|
| Number of Visitors Staying with Friends and Family     | 568,894          |
| Number of Visitors Staying in Holiday Homes            | 683,336          |
| Number of Visitors Staying in Commercial Accommodation | 586,144          |
| Number of Visitors Staying in Caravan Parks            | 488,990          |
| Number of Visitors Staying in Paid Accommodation       | 1,075,134        |
| Total Number of Overnight Visitors                     | 2,327,365        |
| Total Number of Daytrip Visitors                       | 3,459,640        |
| <b>Total Number of Visitors</b>                        | <b>5,787,005</b> |

Source: Urban Enterprise, 2018.

Geelong Urban drives more than one half of total visitation to the region, however the majority of these visitors are day-trippers. The Bellarine Peninsula including Bellarine North, Bellarine South and Queenscliff and Point Lonsdale 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.



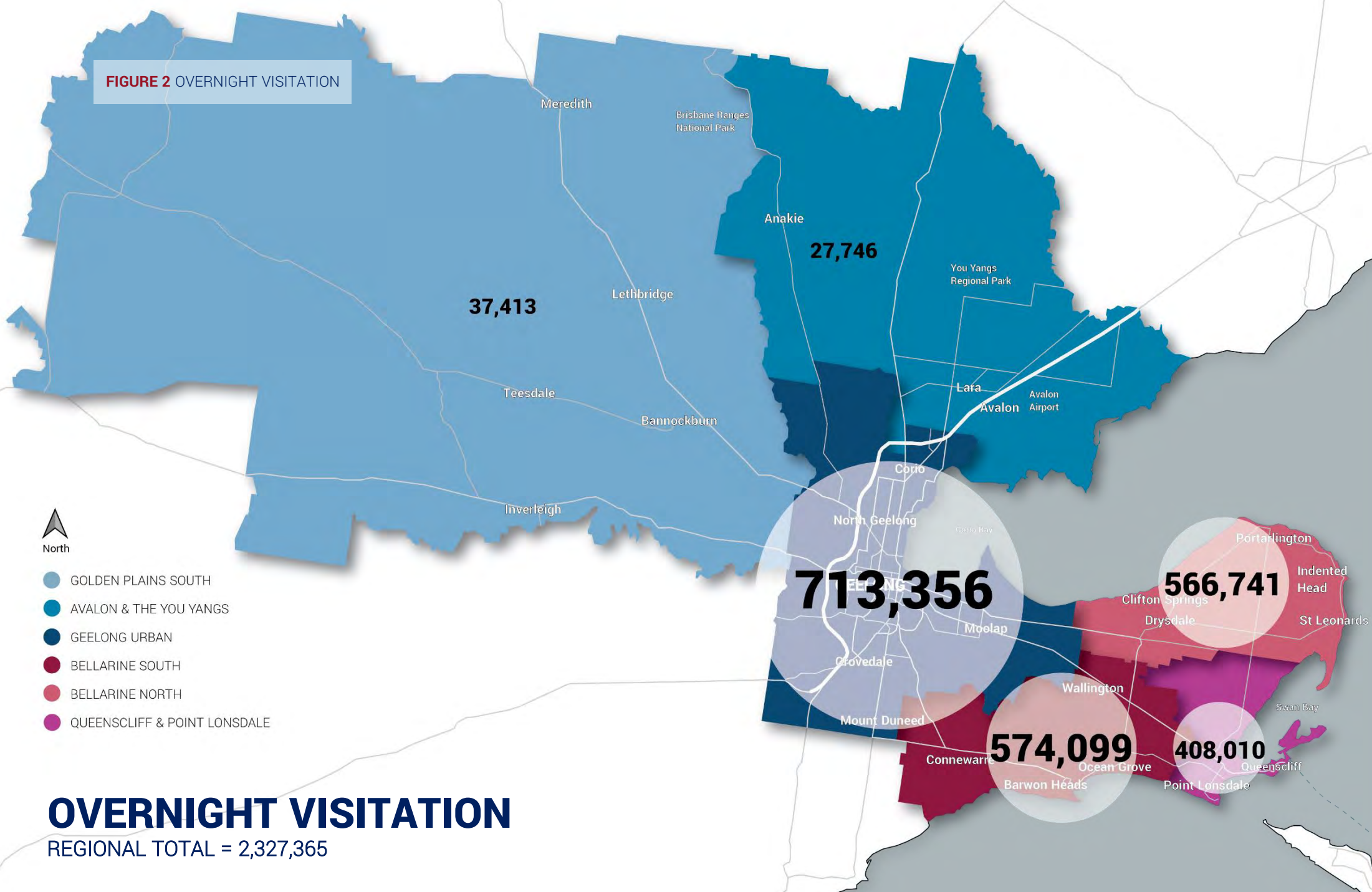
FIGURE 2 OVERNIGHT VISITATION



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# OVERNIGHT VISITATION

REGIONAL TOTAL = 2,327,365



**FIGURE 3** DAYTRIP VISITATION



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# DAYTRIP VISITATION

REGIONAL TOTAL = 3,459,640

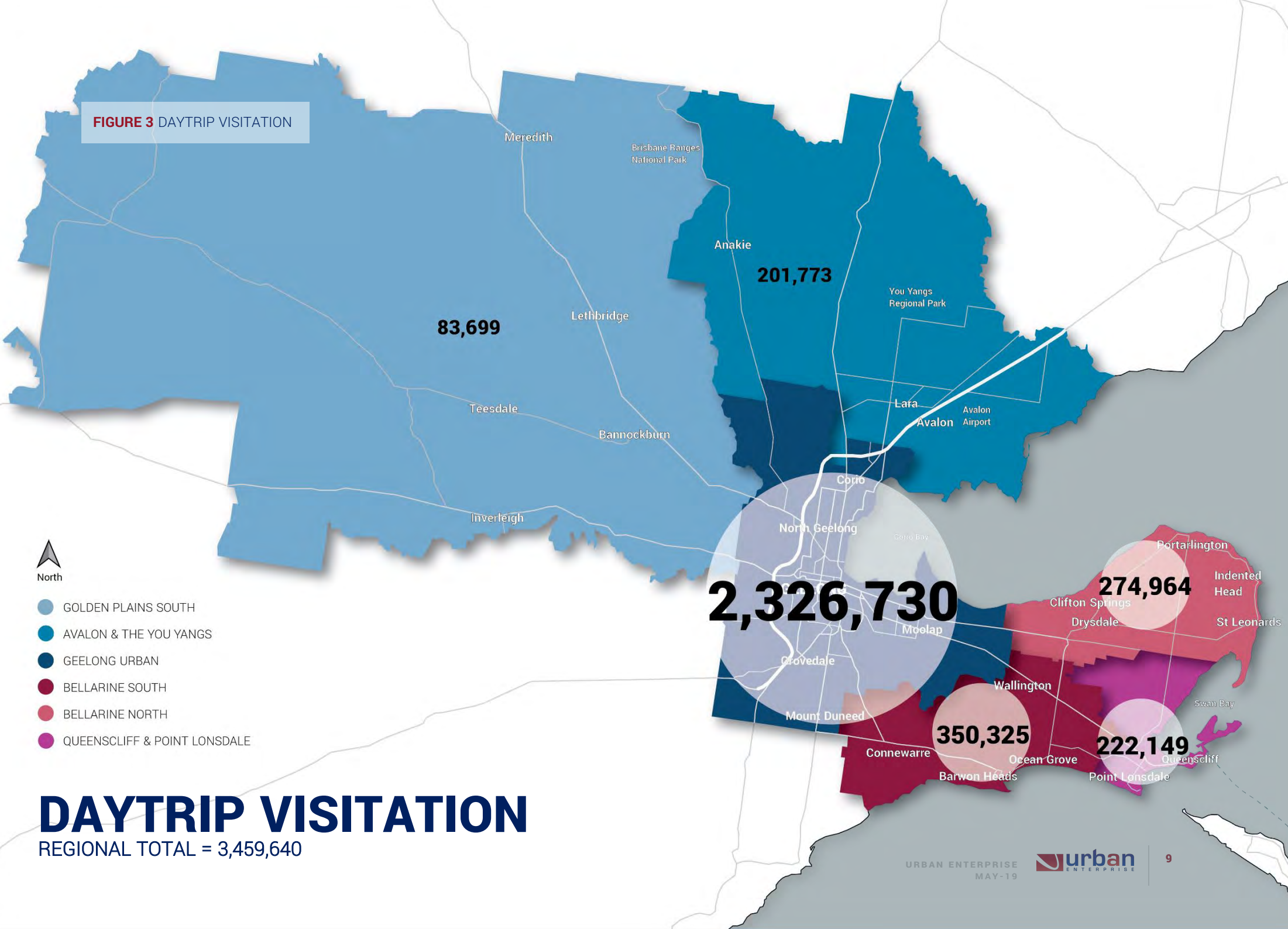


FIGURE 4 TOTAL VISITATION

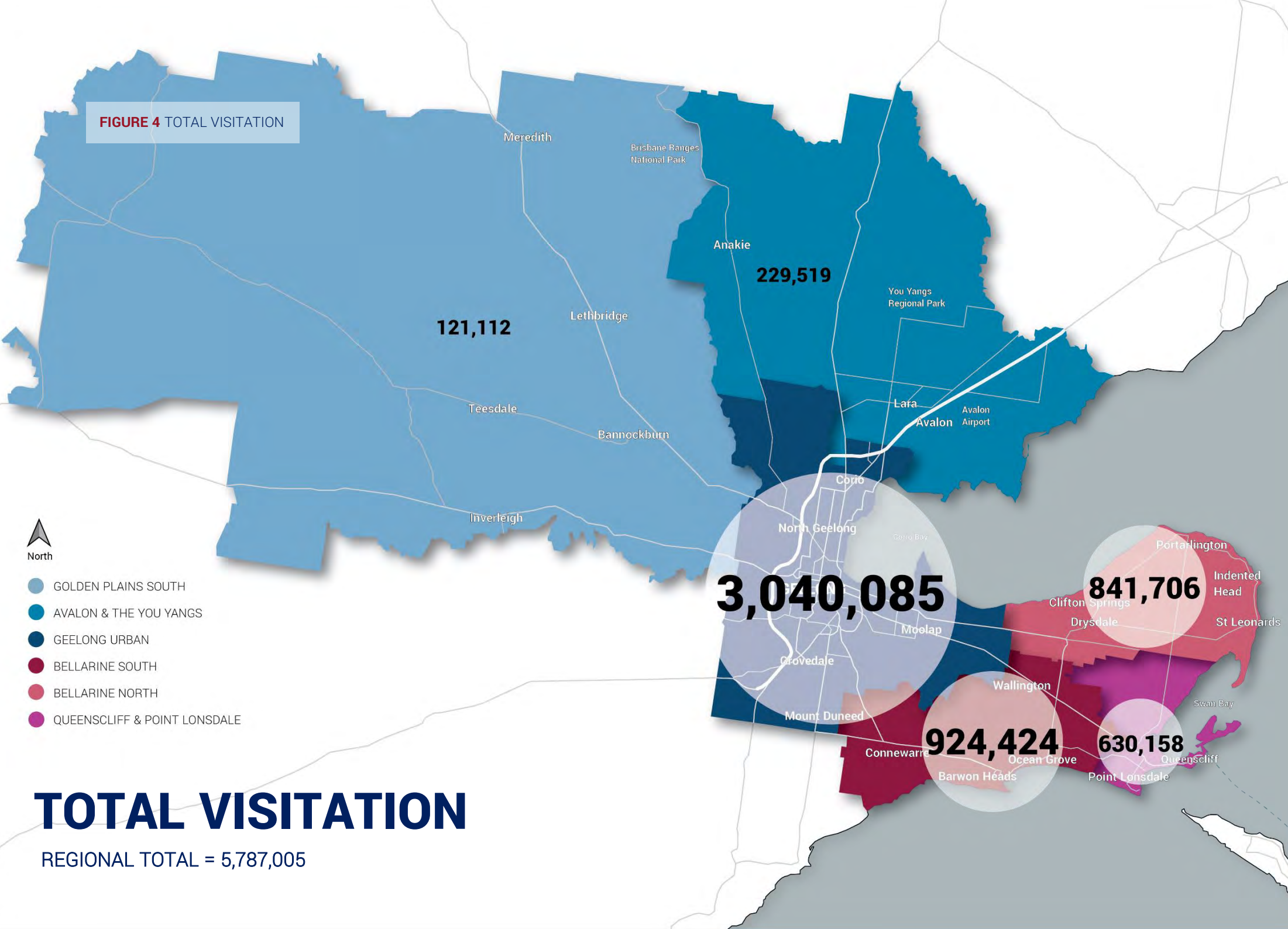


North

- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# TOTAL VISITATION

REGIONAL TOTAL = 5,787,005



## 2.4. TRENDS IN VISITATION

Table 2 shows the growth in visitation in each subregion over the past 3 years, using Urban Enterprise’s PAVE model. Visitation to the Greater Geelong and the Bellarine region has grown by 5% per year on average. Daytrip visitation to the region has grown by 7%, with overnight visitation growing by only 3%.

There has been very little growth in overnight visitation in Queenscliff & Point Lonsdale (1%) and Bellarine North (1%). The most significant growth in overnight trips has been in Golden Plains South (17% p/a) and Avalon & the You Yangs (9% p/a), which may be connected to the significant VFR market.

There has been no growth in day trip visitation to Queenscliff & Point Lonsdale and very little growth in visitation to Golden Plains South (2% p/a), indicating limited investment in tourism product and little promotion of existing product.

Geelong has continued to grow steadily, with a total visitation growth rate of 6% per annum. Overall, Avalon and the You Yangs has experienced the greatest overall growth in visitation (13%), which could be attributed to the recent development of an international terminal and the attraction of Air Asia flights.

**Geelong and the Bellarine Region grew substantially over the period 2015-2018, with an additional 840,000 visitors to the region. The majority of this growth occurred in daytrip visitors to Geelong Urban and the Bellarine Peninsula. Queenscliff and Point Lonsdale, however experienced little visitation growth. There are a number of reasons for the limited growth in Queenscliff and Point Lonsdale, this includes:**

- Lower interest in static heritage product from key visitors markets;
- Lack of investment in contemporary visitor product and experiences;
- Static population growth compared to other areas, affecting VFR market;
- Static accommodation supply.

TABLE 2 OVERNIGHT TRIPS

| OVERNIGHT VISITATION                  |                  |                   |                            |
|---------------------------------------|------------------|-------------------|----------------------------|
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 398,582          | 408,010           | 1%                         |
| Bellarine North                       | 542,251          | 566,741           | 1%                         |
| Bellarine South                       | 513,125          | 574,099           | 4%                         |
| Avalon & You Yangs                    | 21,289           | 27,746            | 9%                         |
| Geelong Urban                         | 659,406          | 713,356           | 3%                         |
| Golden Plains South                   | 23,157           | 37,413            | 17%                        |
| <b>Geelong &amp; Bellarine region</b> | <b>2,157,811</b> | <b>2,329,382</b>  | <b>3%</b>                  |
| DAY TRIP VISITATION                   |                  |                   |                            |
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 225,310          | 222,149           | 0%                         |
| Bellarine North                       | 229,734          | 274,964           | 6%                         |
| Bellarine South                       | 264,544          | 350,325           | 10%                        |
| Avalon & You Yangs                    | 135,988          | 201,773           | 14%                        |
| Geelong Urban                         | 1,860,030        | 2,326,730         | 8%                         |
| Golden Plains South                   | 78,754           | 83,699            | 2%                         |
| <b>Geelong &amp; Bellarine region</b> | <b>2,796,375</b> | <b>3461658.26</b> | <b>7%</b>                  |
| TOTAL VISITATION                      |                  |                   |                            |
| Subregion                             | 2015             | 2018              | Average Annual Growth Rate |
| Queenscliff & Point Lonsdale          | 623,892          | 630,158           | 0%                         |
| Bellarine North                       | 771,985          | 841,706           | 3%                         |
| Bellarine South                       | 777,669          | 924,424           | 6%                         |
| Avalon & You Yangs                    | 157,277          | 229,519           | 13%                        |
| Geelong Urban                         | 2,519,437        | 3,040,085         | 6%                         |
| Golden Plains South                   | 101,911          | 121,112           | 6%                         |
| <b>Geelong &amp; Bellarine region</b> | <b>4,954,186</b> | <b>5,791,041</b>  | <b>5%</b>                  |

Source: Urban Enterprise, 2018.

## 2.5. ECONOMIC IMPACT OF TOURISM

### 2.5.1. INTRODUCTION

This section details the flow-on economic benefits of tourism for the Greater Geelong and The Bellarine Region. Specifically, this includes the following (direct and indirect<sup>1</sup>) economic benefits generated by visitor expenditure in the Region<sup>2</sup>:

- Economic output; and
- Number of jobs created.

These economic impacts are estimated as annual benefits and are calculated using the input-output multiplier method (developed by REMPLAN and applied by Urban Enterprise). Definitions for key economic terms are provided in Appendix B.

### 2.5.2. CURRENT ECONOMIC IMPACT

The following details the current economic impact from existing visitation to the region (5.8 million) and visitor expenditure (\$1.1 billion) for 2018.

#### ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (CURRENT)

Table 3 shows the estimated economic impact from visitor expenditure in the Region in terms of economic output. This analysis has been disaggregated by sub-region.

Overall, total visitor expenditure of \$1.1 billion<sup>3</sup> – represented by the ‘direct effect’ column – is expected to generate total **economic output of \$2.2 billion**, inclusive of the flow-on indirect effects.

This is driven by the Geelong Urban sub-region, which comprises around 40% of total economic output, generated by higher levels of direct visitor expenditure.

<sup>1</sup> The direct effect is represented by additional visitor expenditure in the region; and the indirect effect reflects the additional, flow-on output generated by other sectors of the economy, particularly the supply-chain.

<sup>2</sup> The analysis assumes visitor expenditure is spent on a combination of: accommodation, retail, food and beverage and transport.

**TABLE 3** ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (CURRENT)

| REGION                                | DIRECT EFFECT          | INDIRECT EFFECT        | TOTAL EFFECT           |
|---------------------------------------|------------------------|------------------------|------------------------|
| Golden Plains South                   | \$14,365,000           | \$13,566,000           | \$27,931,000           |
| Avalon & You Yangs                    | \$17,361,000           | \$17,001,000           | \$34,362,000           |
| Geelong Urban                         | \$461,758,000          | \$446,506,000          | \$908,264,000          |
| Bellarine South                       | \$237,541,000          | \$219,565,000          | \$457,106,000          |
| Bellarine North                       | \$193,279,000          | \$178,276,000          | \$371,555,000          |
| Queenscliff & Point Lonsdale          | \$185,931,000          | \$171,031,000          | \$356,962,000          |
| <b>Geelong &amp; Bellarine region</b> | <b>\$1,110,235,000</b> | <b>\$1,045,945,000</b> | <b>\$2,156,180,000</b> |

Source: Urban Enterprise 2018

#### ONGOING ECONOMIC IMPACT – EMPLOYMENT (CURRENT)

In addition, the total visitor expenditure driven by the tourism industry is expected to create additional jobs in the region (note: this variable represents total numbers of employees without any conversions to full-time equivalence).

As shown in Table 4, total visitor expenditure (of \$1.1 billion) is expected to generate **11,264 jobs** on an ongoing basis, including direct and indirect employment.

Again, over 40% of jobs are created in the Geelong Urban sub-region, which reflects the increased economic output.

<sup>3</sup> Visitor expenditure has been calculated using a 3-year average

**TABLE 5** ONGOING ECONOMIC IMPACT – EMPLOYMENT (CURRENT)

| REGION                                | DIRECT EFFECT | INDIRECT EFFECT | TOTAL EFFECT  |
|---------------------------------------|---------------|-----------------|---------------|
| Golden Plains South                   | 98            | 48              | 146           |
| Avalon & You Yangs                    | 124           | 60              | 184           |
| Geelong Urban                         | 3,245         | 1,584           | 4,829         |
| Bellarine South                       | 1,577         | 780             | 2,357         |
| Bellarine North                       | 1,280         | 633             | 1,913         |
| Queenscliff & Point Lonsdale          | 1,227         | 608             | 1,835         |
| <b>Geelong &amp; Bellarine region</b> | <b>7,551</b>  | <b>3,713</b>    | <b>11,264</b> |

Source: Urban Enterprise 2018

### 2.5.3. PROJECTED ECONOMIC IMPACT

Based on projected growth in visitation to the region – 7.5 million visitors by 2027 – and corresponding growth in visitor expenditure (\$1.7 billion), the economic impact of tourism is also expected to increase.<sup>4</sup>

#### ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (2027)

With total projected expenditure of \$1.7 billion by 2027, the total economic output is expected to increase to **\$3.3 billion**, inclusive of the flow-on indirect effects (see Table 6).

This represents an increase of \$1.1 billion (53%) from current output levels.

<sup>4</sup> Growth in visitor expenditure has been calculated by applying increase in total visitation, as well as increases in visitor expenditure per person, which have been inflated by 2.5% per annum.

**TABLE 6** ONGOING ECONOMIC IMPACT – ECONOMIC OUTPUT (2027)

| REGION                                | DIRECT EFFECT          | INDIRECT EFFECT        | TOTAL EFFECT           |
|---------------------------------------|------------------------|------------------------|------------------------|
| Golden Plains South                   | \$251,912,000          | \$231,625,000          | \$483,537,000          |
| Avalon & You Yangs                    | \$368,462,000          | \$341,776,000          | \$710,238,000          |
| Geelong Urban                         | \$274,009,000          | \$253,315,000          | \$527,324,000          |
| Bellarine South                       | \$729,669,000          | \$709,720,000          | \$1,439,389,000        |
| Bellarine North                       | \$35,594,000           | \$35,061,000           | \$70,655,000           |
| Queenscliff & Point Lonsdale          | \$31,904,000           | \$29,719,000           | \$61,623,000           |
| <b>Geelong &amp; Bellarine region</b> | <b>\$1,691,550,000</b> | <b>\$1,601,216,000</b> | <b>\$3,292,766,000</b> |

Source: Urban Enterprise 2018

#### ONGOING ECONOMIC IMPACT – EMPLOYMENT (2027)

Table 7 shows that total projected visitor expenditure of \$1.7 billion is expected to generate **17,256 jobs**, which represents an increase of almost 6,000 jobs (53%) by 2027.

**TABLE 7** ONGOING ECONOMIC IMPACT – EMPLOYMENT (2027)

| REGION                                | DIRECT EFFECT | INDIRECT EFFECT | TOTAL EFFECT  |
|---------------------------------------|---------------|-----------------|---------------|
| Golden Plains South                   | 1,661         | 823             | 2,484         |
| Avalon & You Yangs                    | 2,457         | 1,214           | 3,671         |
| Geelong Urban                         | 1,819         | 899             | 2,718         |
| Bellarine South                       | 5,165         | 2,518           | 7,683         |
| Bellarine North                       | 256           | 124             | 380           |
| Queenscliff & Point Lonsdale          | 214           | 106             | 320           |
| <b>Geelong &amp; Bellarine region</b> | <b>11,572</b> | <b>5,684</b>    | <b>17,256</b> |

Source: Urban Enterprise 2018

## 3. GREATER GEELONG AND THE BELLARINE MARKET PROFILE

### 3.1. INTRODUCTION

This section provides a profile of tourism visitation to the Greater Geelong and The Bellarine region, including trend analysis of domestic overnight visitation, domestic daytrip visitation and international overnight visitation.

This section also provides an overview of the key target markets for Greater Geelong and The Bellarine.

### 3.2. KEY FINDINGS

99% of visitors to the Greater Geelong and The Bellarine region are from Victoria, with 71% of these visitors from Melbourne.

Domestic visitation to the Bellarine is much more seasonal than visitation to Geelong and Golden Plains South, likely due to a larger holiday visitor market and lower VFR market.

There is a significantly higher proportion of people staying with friends and relatives in the Greater Geelong and The Bellarine region than other similar coastal locations. Similarly, there is a much higher proportion of people travelling for the purpose of visiting friends and relatives. This is influenced by the large resident population in the region.

A higher proportion of visitors ate out at a restaurant/café than competing coastal destinations and visitors to regional Victoria. Similarly, a higher proportion of visitors took part in paid experiences/activities (e.g. shopping, visiting markets) than similar coastal destinations and Regional Victoria.

75% of visitors to the Bellarine Peninsula went to the beach, which is significantly higher than visitors to similar coastal regions. This also highlights the need for

continued diversification of product in the region including investment in nature based tourism experiences, food, wine and ferments product.

International visitors are a key, growing market for the region, with international students and their visiting family and friends a key market segment. There is significant opportunity to better promote the region to these visitors, as well as opportunity to capture international travellers inbound to Avalon Airport and convert them into daytrip or overnight visitors.

Key target markets for the Greater Geelong and The Bellarine region are the lifestyle leader and MetroTech markets, as well as the traditional family life.

### 3.3. CURRENT MARKETS

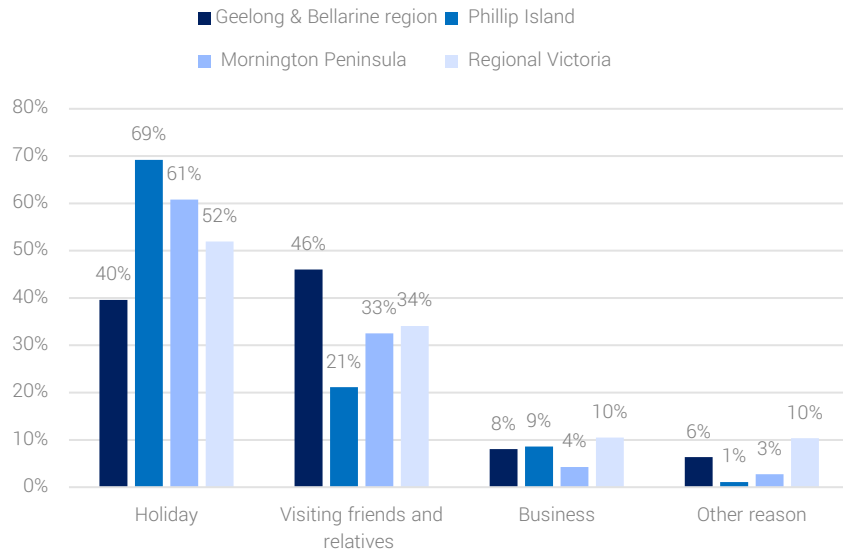
#### 3.3.1. DOMESTIC OVERNIGHT TRIP VISITORS

##### TRIP PURPOSE

Figure 5 shows that by purpose of trip, domestic overnight visitation to Greater Geelong and The Bellarine region show a similar proportion of visitation for Holiday purposes (40%) and for Visiting friends and relatives (46%).

By contrast, competing Victorian coastal destinations such as Phillip Island and the Mornington Peninsula have a clear majority of domestic overnight trips for Holiday purposes (61% and 69%, respectively), with less than 35% of trips for VFR. Domestic overnight trips to total regional Victoria are predominantly for Holiday purposes (56%), with only 29% of trips for VFR.

**FIGURE 5** OVERNIGHT TRIPS, PURPOSE OF TRIP

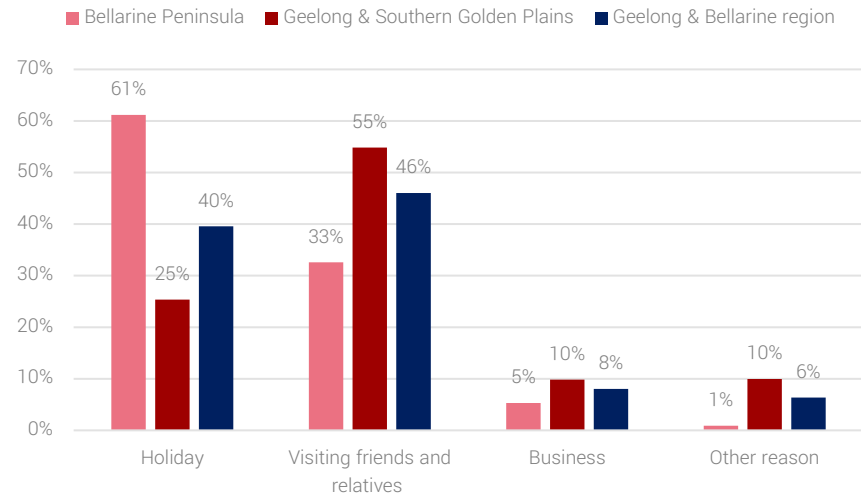


Source: Tourism Research Australia, NVS Overnight, Stopover Reason, Financial Year 2017/18.

Figure 6 shows that within the region however, visitation for Holiday and VFR purposes is largely destination specific for domestic overnight trips. 54% of overnight trips to Geelong & Golden Plains South are for VFR and only 25% for Holiday purposes, due to the large resident population within the sub-region.

By contrast, the purpose for domestic overnight visitation to the Bellarine Peninsula is largely similar to other coastal destinations in Victoria, with 66% of overnight trips for Holiday purposes and only 29% for VFR.

**FIGURE 6** OVERNIGHT – PURPOSE OF TRIP



Source: Tourism Research Australia, NVS Overnight, Stopover Reason, Financial Year 2017/18.

**The main purpose of trip for overnight visitors to the Greater Geelong and The Bellarine region reflects the large population and business base of Geelong Urban, with lower levels of holiday leisure visitation than similar regions around Melbourne, and a corresponding higher level of visiting friends and relatives. Data for the Bellarine Peninsula shows that it attracts much higher levels of holiday leisure visitation than Urban Geelong.**

## VISITOR ORIGIN

The majority of domestic overnight visitors to the Greater Geelong and The Bellarine region are from Victoria (86%), with 60% of visitors from Melbourne and 27% from Regional Victoria. The Greater Geelong and The Bellarine region receives a lower proportion of visitors from Melbourne than competing Mornington Peninsula (73%) or Phillip Island (79%) destinations, however a greater proportion of visitors to the Greater Geelong and The Bellarine region are from Regional Victoria (27%).

**TABLE 8** OVERNIGHT TRIPS, STATE OF VISITOR ORIGIN

| Origin                       | Geelong & Bellarine Region | Phillip Island | Mornington Peninsula | Regional Victoria |
|------------------------------|----------------------------|----------------|----------------------|-------------------|
| Victoria                     | 86%                        | 91%            | 86%                  | 85%               |
| Melbourne                    | 60%                        | 79%            | 73%                  | 61%               |
| Other VIC                    | 27%                        | 11%            | 13%                  | 24%               |
| New South Wales              | 5%                         | 5%             | 5%                   | 7%                |
| Queensland                   | 4%                         | 1%             | 4%                   | 2%                |
| South Australia              | 1%                         | 1%             | 2%                   | 3%                |
| Western Australia            | 1%                         | 1%             | 0%                   | 1%                |
| Tasmania                     | 1%                         | 1%             | 1%                   | 1%                |
| Northern Territory           | 0%                         | 0%             | 0%                   | 0%                |
| Australian Capital Territory | 1%                         | 0%             | 1%                   | 1%                |
| Total                        | 100%                       | 100%           | 100%                 | 100%              |

Source: Tourism Research Australia, NVS Overnight, Origin, Financial Year 2017/18.

**Origin data highlights the importance of promotion of Greater Geelong and The Bellarine region to regional Victorian destinations as well as directly into Melbourne. Large inland regional centres such as Ballarat and Bendigo provide a strong market for Greater Geelong and The Bellarine.**

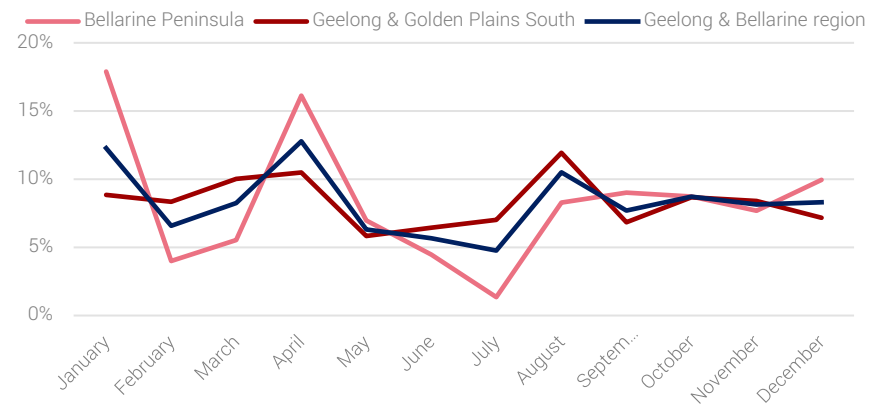
## SEASONALITY

Visitation for the Greater Geelong and The Bellarine region peaks in April at 13%, however is generally consistent with many coastal destinations, in that visitation is higher during summer and lower during winter. Visitation peaks in the month of January (12%) of trips and the least number of trips are in the month of July, during the middle of winter.

Visitation to the Geelong and Golden Plains South region is steady and doesn't show much seasonality, due to the large population base, and associated VFR and business market. The Bellarine Peninsula shows significant fluctuation, as most coastal destinations like Mornington Peninsula and Phillip Island do. However, the Surf Coast experiences much less fluctuation, potentially due to the Great Ocean Road which attracts high visitor numbers throughout the year and large numbers of international visitors.

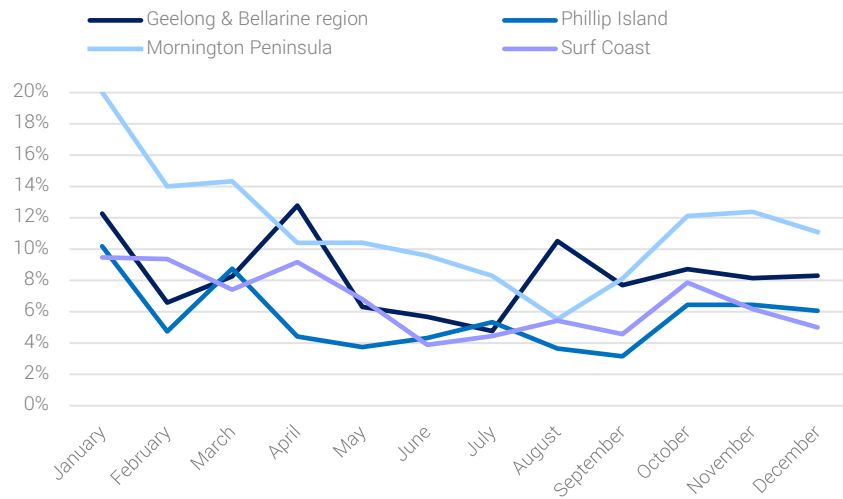
Visitation to the Bellarine Peninsula drops to 1% in July, whereas visitation to Geelong and Golden Plains South remains relatively consistent at 7% of trips. The Bellarine Peninsula has high visitation during the month of April, coinciding with the Easter holiday break.

**FIGURE 7** OVERNIGHT TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Overnight, Month returned from trip, Financial Year 2017/18.

**FIGURE 8** OVERNIGHT TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Overnight, Month returned from trip, Financial Year 2017/18.

## VISITOR ACTIVITIES

Analysis of domestic overnight visitor activities undertaken in the Greater Geelong and The Bellarine region highlights the popular urban tourism product offerings of Geelong, and the nature-based tourism strengths of the Bellarine Peninsula. Visitors

to the Greater Geelong and The Bellarine region are more likely than visitors to Regional Victoria to both Eat out/dine at a restaurant/café (65%) and visit friends and relatives (59%).

Visitors to the Bellarine Peninsula (75%) are more likely to visit the beach than similar coastal locations, such as Mornington Peninsula (54%) and Phillip Island (62%). 11% of trips to the Bellarine Peninsula included visiting markets, higher than the 8% of visitors across regional Victoria that visited local markets.

65% of trips to the Geelong and Golden Plains South area included visiting Friends & relatives, significantly higher than the 45% of total Regional Victoria. Therefore, engagement of local residents in the tourism product offering and destination marketing in Geelong is critical, due to the large VFR market.

Visitors to the Greater Geelong and The Bellarine region are more than twice as likely to attend an organised sporting event than visitors to Regional Victoria, which highlights the opportunity to keep growing the region as a sporting destination.

**It is important to note that 20% of visitors to the Geelong and Golden Plains South region did not participate in any activities, which is more than double the regional Victoria average. This may highlight a lack of attractive activities for visitors to undertake in this region.**

**TABLE 9** OVERNIGHT TRIPS, ACTIVITIES

| Activities Undertaken                                  | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & Bellarine Region | Phillip Island | Mornington Peninsula | Regional Victoria |
|--|---------------------|-------------------------------|----------------------------|----------------|----------------------|-------------------|
| Eat out / dine at a restaurant and/or cafe             | 66%                 | 65%                           | <b>65%</b>                 | 59%            | 56%                  | 58%               |
| Visit friends & relatives                              | 49%                 | 65%                           | <b>59%</b>                 | 37%            | 45%                  | 45%               |
| Go to the beach  | 75%                 | 25%                           | <b>45%</b>                 | 62%            | 54%                  | 25%               |
| Sightseeing/looking around                             | 42%                 | 23%                           | <b>31%</b>                 | 30%            | 23%                  | 28%               |
| Go shopping for pleasure                               | 20%                 | 26%                           | <b>23%</b>                 | 17%            | 20%                  | 17%               |
| Pubs, clubs, discos etc                                | 16%                 | 19%                           | <b>18%</b>                 | 16%            | 15%                  | 22%               |
| None of these  | 9%                  | 20%                           | <b>15%</b>                 | 4%             | 7%                   | 7%                |
| Go to markets  | 11%                 | 9%                            | <b>10%</b>                 | 10%            | 7%                   | 8%                |
| Go on a daytrip to another place                       | 11%                 | 5%                            | <b>7%</b>                  | 3%             | 4%                   | 6%                |
| Visit national parks / state parks                     | 8%                  | 7%                            | <b>7%</b>                  | 12%            | 11%                  | 14%               |
| Exercise, gym or swimming                              | 7%                  | 6%                            | <b>7%</b>                  | 9%             | 8%                   | 6%                |
| Attend an organised sporting event                     | 3%                  | 9%                            | <b>7%</b>                  | 4%             | 2%                   | 3%                |
| Visit wineries   | 11%                 | 4%                            | <b>6%</b>                  | 3%             | 11%                  | 5%                |
| Visit museums or art galleries                         | 6%                  | 5%                            | <b>5%</b>                  | 4%             | 4%                   | 5%                |
| Bushwalking / rainforest walks                         | 5%                  | 5%                            | <b>5%</b>                  | 20%            | 11%                  | 15%               |
| Visit botanical or other public gardens                | 4%                  | 5%                            | <b>5%</b>                  | 4%             | 3%                   | 4%                |
| Fishing  | 10%                 | 1%                            | <b>4%</b>                  | 4%             | 3%                   | 6%                |
| Attend festivals / fairs or cultural events            | 3%                  | 5%                            | <b>4%</b>                  | 3%             | 2%                   | 4%                |
| Visit history / heritage buildings, sites or monuments | 5%                  | 3%                            | <b>4%</b>                  | 3%             | 4%                   | 5%                |
| Picnics or BBQs  | 6%                  | 2%                            | <b>4%</b>                  | 6%             | 3%                   | 6%                |
| Golf   | 5%                  | 3%                            | <b>3%</b>                  | 2%             | 3%                   | 3%                |
| Play other sports                                      | 4%                  | 2%                            | <b>3%</b>                  | 4%             | 3%                   | 4%                |
| Surfing  | 6%                  | 1%                            | <b>3%</b>                  | 6%             | 3%                   | 2%                |
| Attend theatre, concerts or other performing arts      | 2%                  | 3%                            | <b>3%</b>                  | 1%             | 2%                   | 2%                |

Source: Tourism Research Australia, Individual Activity on Stopover, NVS Overnight, Financial Year 2017/18

## ACCOMMODATION

Visitors on domestic overnight trips to the Greater Geelong and The Bellarine region are most likely to stay at a Friends or Relatives Property (56%), particularly visitors to Geelong & Golden Plains South (63%), although this is still the leading type of accommodation for the Bellarine Peninsula (47%).

The majority of visitors staying in Standard Hotel/Motor inn style accommodation are in Geelong & Golden Plains South (16%), compared with only 2% in the Bellarine Peninsula. This may highlight a lack of standard hotel/motor inn style accommodation on the Bellarine Peninsula.

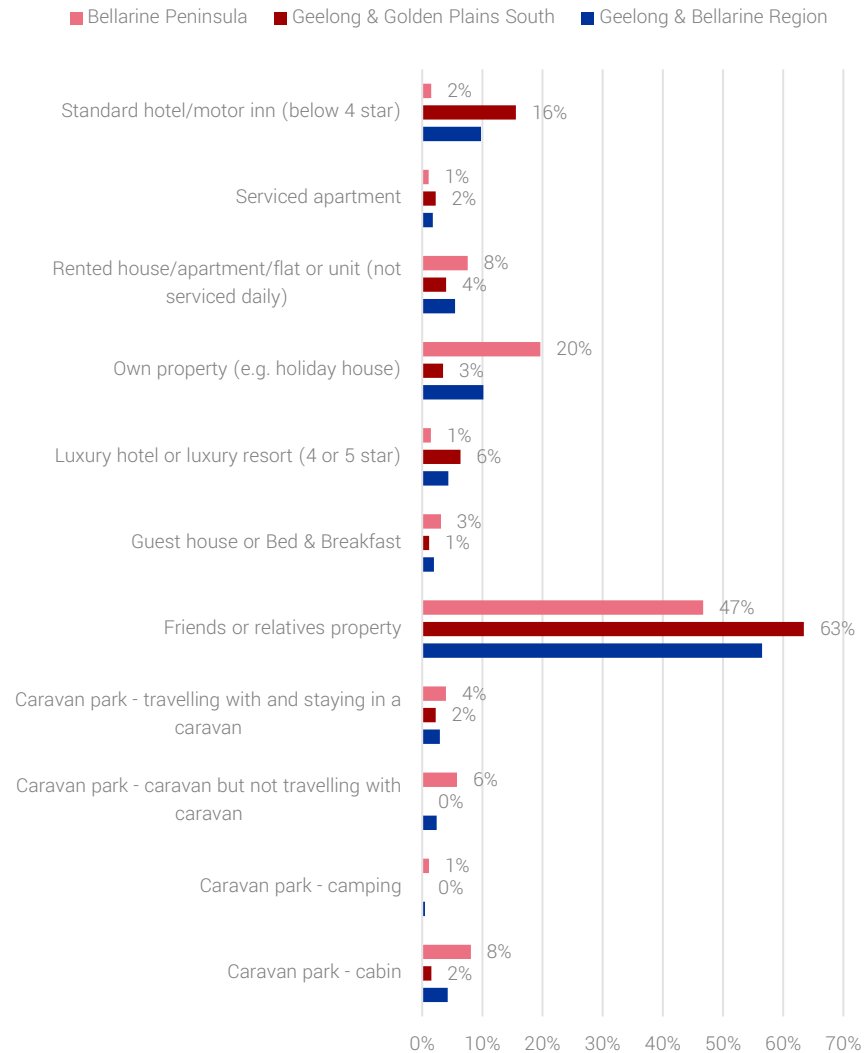
The holiday home market is prominent in the Bellarine Peninsula; however, it has experienced a significant shift in accommodation types. Since 2015, there has been a significant decline of 7% in overnight visitors staying in a Rented House/Apartment/Flat or unit that is not serviced daily (total 8%), and an increase in 6% of people staying in their own property (total 20%).

The Bellarine Peninsula also has a strong caravan, cabin and camping market; with 19% of visitors staying in a caravan park (either staying in a caravan, cabin or camping). The data highlights significant supply of caravan parks across the Bellarine Peninsula servicing this market.

Only 4% of overnight visitors to the Greater Geelong and The Bellarine stayed in a luxury hotel or luxury resort (4 or 5 star) in the 2017/18 financial year, driven mainly by visitors to Geelong and Southern Golden Plains (6%).

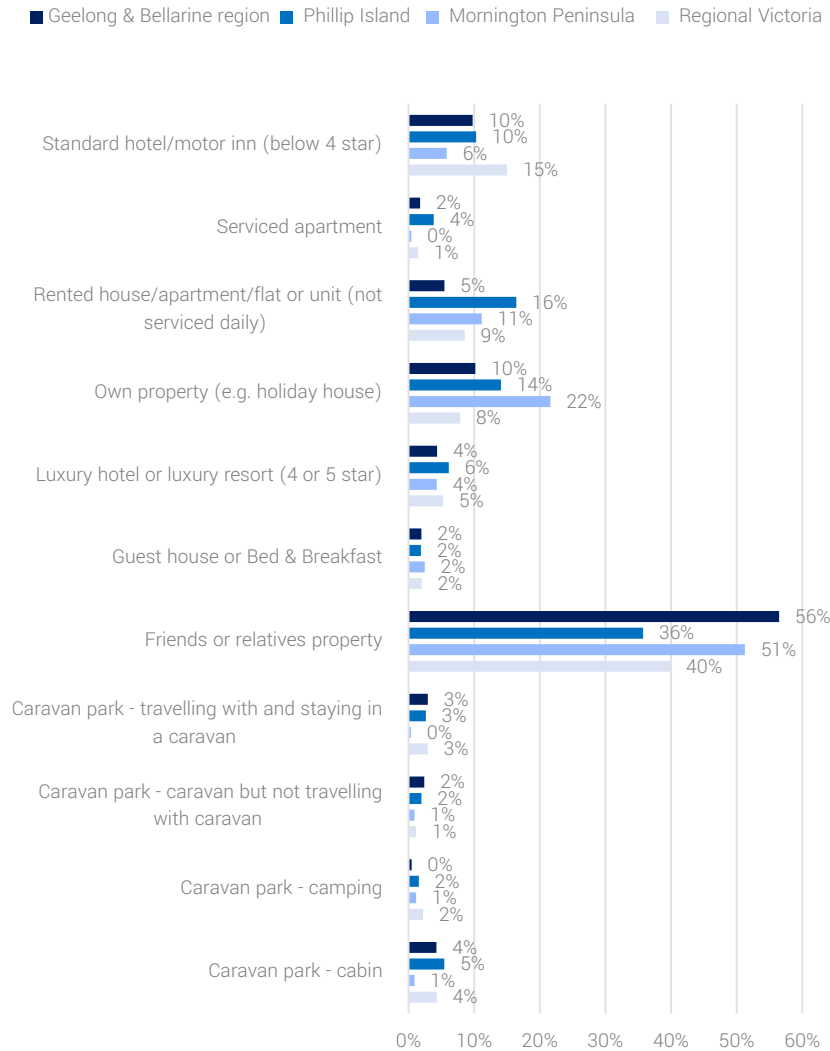
The Greater Geelong and The Bellarine region has a greater proportion of domestic overnight visitors staying with their friends or relatives (56%) compared to Regional Victoria (40%), although a similar proportion to Mornington Peninsula (51%). However, the Mornington Peninsula has a much greater proportion of visitors staying in their own property (22%), than the Greater Geelong and The Bellarine region (10%); this is similar to Regional Victoria, (8%).

FIGURE 9 OVERNIGHT TRIPS, ACCOMMODATION



Source: Tourism Research Australia, Stopover Accommodation, NVS Overnight, Financial Year 2017/18.

**FIGURE 10** OVERNIGHT TRIPS, ACCOMMODATION, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Overnight, Stopover Accommodation, Financial Year 2017/18.

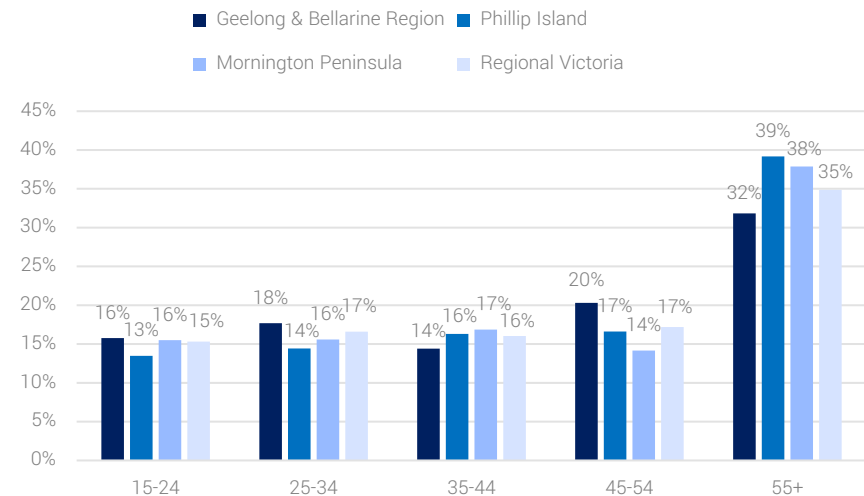
**VISITOR AGE**

The overall age profile of overnight visitors to the Greater Geelong and Bellarine region is similar to that of Regional Victoria.

Geelong and the Bellarine region has a slightly lower number of visitors in the 55+ age group compared to similar coastal locations. This may indicate a number of previous visitors staying in their holiday homes now having moved permanently to their holiday homes.

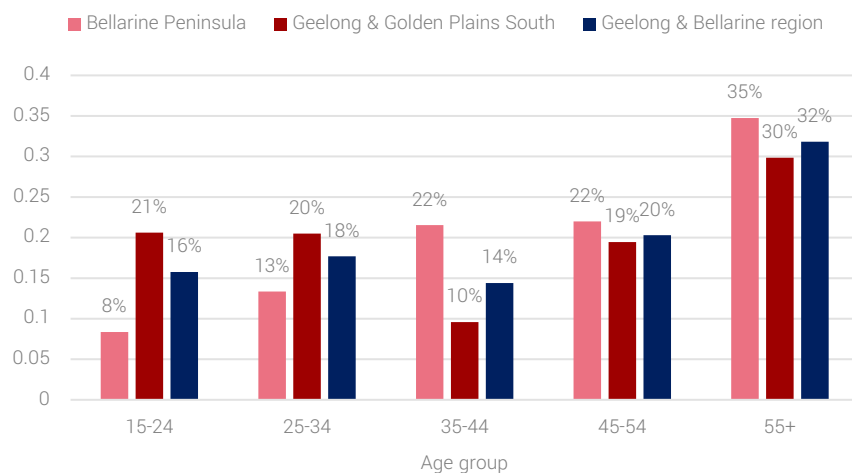
Within the Greater Geelong and the Bellarine region, the age profile of visitors to the Bellarine Peninsula has a strong skew towards the older age groups, with 55% of visitors aged 45 and over. Conversely, Geelong & Golden Plains South has a greater proportion of younger visitors, with 41% of overnight visitors aged between 15-34.

**FIGURE 11** OVERNIGHT TRIPS, VISITOR AGE, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Overnight, Age group, Financial Year 2017/18.

**FIGURE 12** OVERNIGHT TRIPS, VISITOR AGE



Source: Tourism Research Australia, NVS Overnight Age group, Financial Year 2017/18.

### 3.3.2. DOMESTIC DAYTRIP VISITORS

#### VISITOR ORIGIN

99% of day trip visitors to Greater Geelong and the Bellarine region are from Victoria, with 71% of visitors originating from Melbourne.

The top 5 LGA's where daytrip visitors originate from is shown in Table 11. This highlights that a significant proportion of visitors to the Greater Geelong and The Bellarine region are from Western Regional Victoria (Ballarat, Colac-Otway) and from Western Melbourne (Wyndham, Hobsons Bay).

**TABLE 10** DAY TRIPS, VISITOR ORIGIN

| Visitor Origin         | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & the Bellarine Peninsula |
|------------------------|---------------------|-------------------------------|-----------------------------------|
| <b>Victoria</b>        | 100%                | 99%                           | 99%                               |
| <i>Melbourne</i>       | 74%                 | 70%                           | 71%                               |
| <i>Other VIC</i>       | 26%                 | 30%                           | 29%                               |
| <b>Other Australia</b> | 0%                  | 1%                            | 1%                                |

Source: Tourism Research Australia, Visitor Origin, NVS Daytrip, Financial Year 2017/18.

**TABLE 11** DAY TRIPS, HOME LGA WITHIN VICTORIA

| Home LGA        | % of Victorian daytrip visitors |
|-----------------|---------------------------------|
| Wyndham (C)     | 6%                              |
| Ballarat (C)    | 5%                              |
| Hobsons Bay (C) | 4%                              |
| Colac-Otway (S) | 4%                              |
| Hume (C)        | 4%                              |

Source: Tourism Research Australia, Visitor Origin, NVS Daytrip, Financial Year 2017/18.

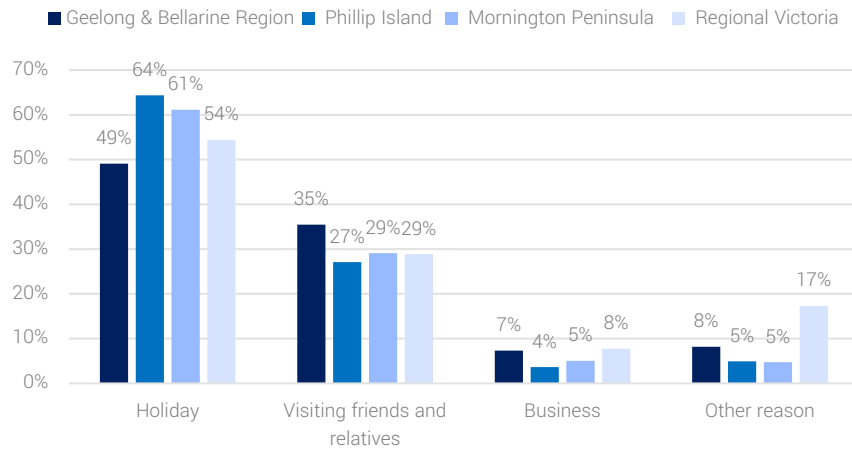
## TRIP PURPOSE

The majority of daytrip visitors to the Greater Geelong and The Bellarine region are visiting for holiday and leisure purposes (49%) followed by VFR (35%).

Visitation follows a similar pattern within the region, although the Bellarine Peninsula has a slightly higher percentage of Holiday visitation.

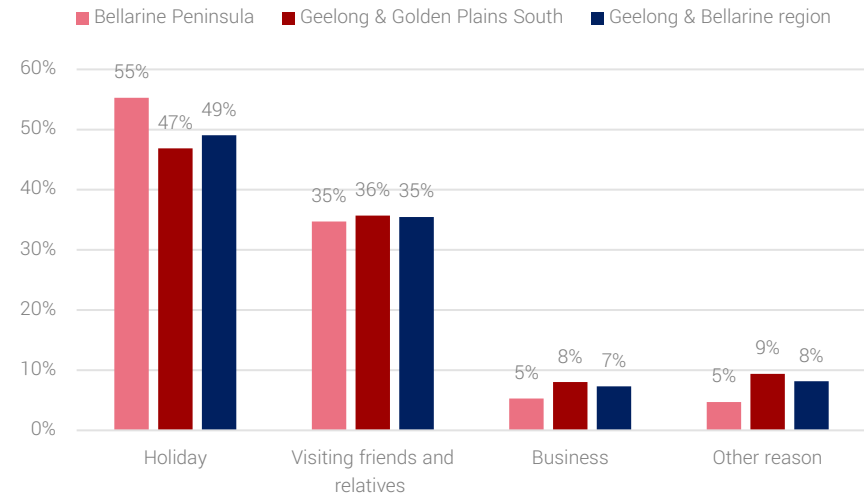
Greater Geelong and The Bellarine region has a stronger VFR market than other similar coastal locations, and a similarly higher percentage of visitation for Business purposes.

**FIGURE 13** DAYTRIP, PURPOSE OF TRIP, REGIONAL BENCHMARKING



Source: Tourism Research Australia, NVS Daytrip, Main Reason for Trip, Financial Year 2017/18.

**FIGURE 14** DAYTRIP, PURPOSE OF TRIP



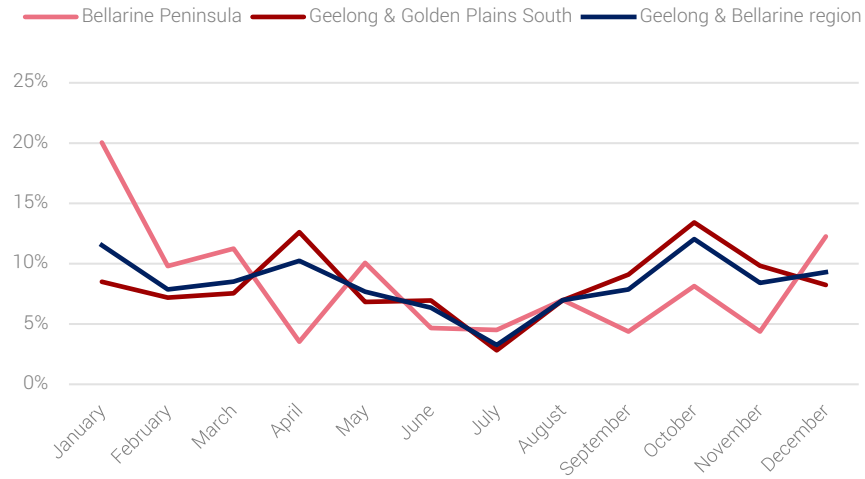
Source: Tourism Research Australia, NVS Daytrip, Main Reason for Trip, Financial Year 2017/18.

## SEASONALITY

Figure 15 shows that day trips to the Bellarine Peninsula peak at 20% in the month of January and fall to a low of 4% in April. Visitation to both sub-regions falls significantly in July.

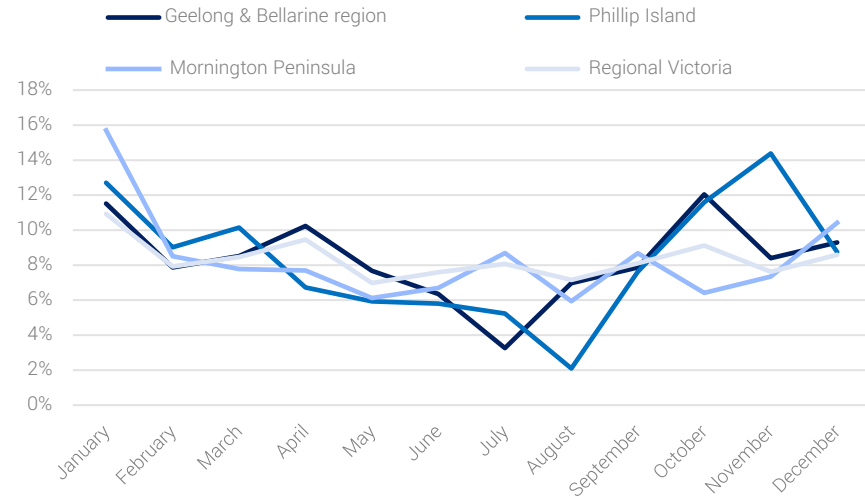
Figure 16 shows that visitation is quite seasonal to Greater Geelong and the Bellarine region when compared to similar coastal locations like the Mornington Peninsula.

**FIGURE 15** DAY TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Daytrip, Month returned from trip, Financial Year 2017/18.

**FIGURE 16** DAY TRIPS, SEASONALITY



Source: Tourism Research Australia, NVS Daytrip, Month returned from trip, Financial Year 2017/18.

### 3.3.3. INTERNATIONAL VISITORS

International visitors are an important, growing market for Greater Geelong and The Bellarine with 53,000 international overnight visitors visiting the region in 2018 (Business Victoria, 2018). International students are a key segment of this market, and in particular their visiting friends and relatives.

#### TRIP PURPOSE

The majority of international visitors to the Greater Geelong and The Bellarine region are visiting for Holiday purposes (45%), however a large proportion are also Visiting Friends and Relatives (31%). 9% of international visitors were visiting for Business and 6% for Education.

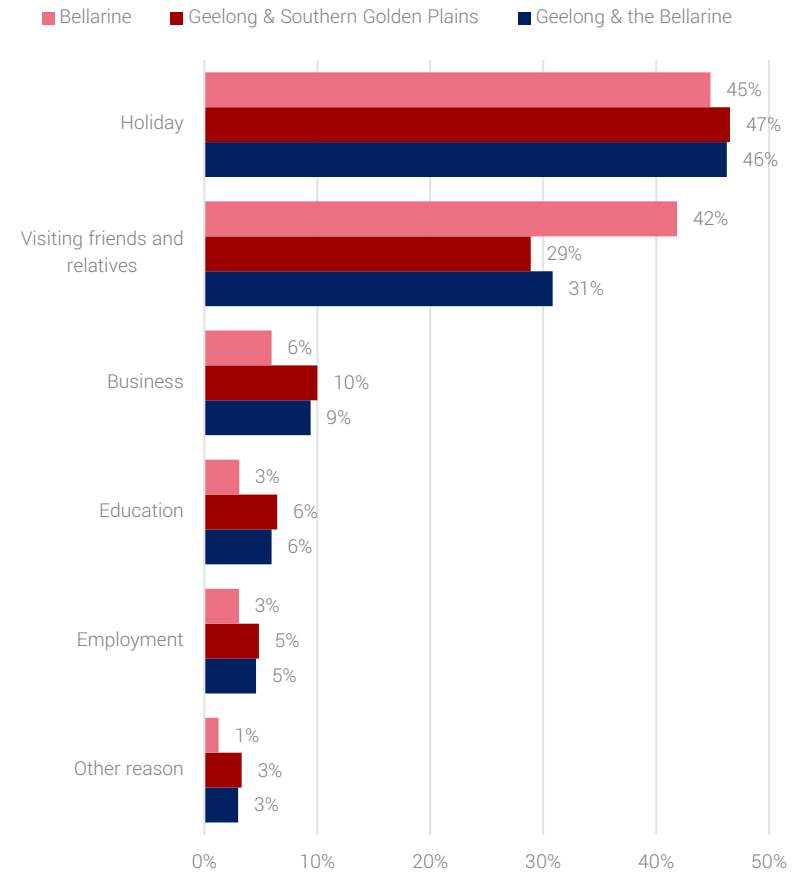
The main purpose of travel for international visitors to the Bellarine Peninsula was Visiting Friends and Relatives (42%), which is significantly higher than Geelong & Southern Golden Plains (29%).

**International students are an important source of visitation for the region, particularly to Geelong Urban with Deakin University waterfront campus and Waurn Ponds campus. Geelong receives around 3,800 international students annually, predominately tertiary students (2,949). The economic activity generated per annum by a single secondary student is \$32,155, and by a tertiary student is \$41,675<sup>5</sup>.**

**Further promotion of the Greater Geelong and the Bellarine to international markets is necessary, as there is an increasing number of international students and their visiting family and friends.**

<sup>5</sup> Study Geelong. REMPLAN economic modelling based on data sourced from ABS 2016 Census Place of Work Employmentm ABS 2014/15 National Input Output Tables, ABS June 2017 Gross State Product, TRA Tourism in Local Government Areas 2016 Greater Geelong.

FIGURE 17 INTERNATIONAL TRIPS, PURPOSE OF VISIT



Source: Tourism Research Australia, IVS, Main Reason for Trip, Calendar Year 2013-17<sup>6</sup>.

<sup>6</sup> Due to the sample size limitations of the International Visitors Survey, analysis of international visitors in this section uses a data average taken over a period of 5 calendar years between 2013-17, in order to increase the reliability of the data.

## VISITOR ORIGIN

The United Kingdom is the largest international visitor market to the Greater Geelong and The Bellarine region, representing 16% of visitors, closely followed by New Zealand at 14% and China at 13%.

The Bellarine Peninsula has a significantly lower Chinese market compared to the Geelong and Golden Plains South area (2% compared to 15%), however has a higher proportion of visitors from the United Kingdom (23% compared to 15%).

**TABLE 12** INTERNATIONAL VISITORS, COUNTRY OF RESIDENCE

| Country of Residence     | Bellarine Peninsula | Geelong & Golden Plains South | Geelong & Bellarine region | Regional Victoria |
|--------------------------|---------------------|-------------------------------|----------------------------|-------------------|
| United Kingdom           | 23%                 | 15%                           | 16%                        | 16%               |
| New Zealand              | 18%                 | 13%                           | 14%                        | 13%               |
| China                    | 2%                  | 15%                           | 13%                        | 10%               |
| United States of America | 9%                  | 8%                            | 8%                         | 9%                |
| Germany                  | 9%                  | 5%                            | 6%                         | 8%                |
| Other Countries          | 4%                  | 5%                            | 5%                         | 4%                |
| Malaysia                 | 5%                  | 5%                            | 5%                         | 4%                |
| Other Asia               | 5%                  | 4%                            | 4%                         | 2%                |
| Other Europe             | 5%                  | 3%                            | 4%                         | 5%                |
| Singapore                | 1%                  | 3%                            | 3%                         | 4%                |
| Netherlands              | 2%                  | 3%                            | 3%                         | 2%                |

Source: Tourism Research Australia, IVS, Country of Residence, Calendar Year 2013-17.

## VISITOR EXPENDITURE AND LENGTH OF STAY

International overnight visitors spent a total of \$98 million in the region in 2018 (YE September). On average, this equated to a spend of \$115 per night and \$1,854 per trip in the region. Alongside Great Ocean Road, Geelong has the highest international visitor spend per night of Victoria's regions.

The 53,000 international overnight visitors to Greater Geelong and the Bellarine region spent an average of 16.1 nights in the region, which is higher than many other regions, notably competing coastal regions Great Ocean Road (4.3 nights) and Mornington Peninsula (16 nights).

**TABLE 13** VISITATION, EXPENDITURE AND TRIP LENGTH – REGIONAL COMPARISON

| Tourism Region                | Visitor Number | Spend Per Person | Spend per Night | Length of stay (nights) |
|-------------------------------|----------------|------------------|-----------------|-------------------------|
| Daylesford and Macedon Ranges | 18,000         | \$542            | \$19            | 29                      |
| Geelong and the Bellarine     | 53,000         | \$1,854          | \$115           | 16.1                    |
| Gippsland                     | 75,000         | \$622            | \$61            | 10.2                    |
| Goldfields                    | 44,000         | \$905            | \$76            | 11.9                    |
| Grampians                     | 51,000         | \$252            | \$48            | 5.2                     |
| Great Ocean Road              | 219,000        | \$505            | \$116           | 4.3                     |
| Mornington Peninsula          | 61,000         | \$951            | \$68            | 14                      |
| Murray Region                 | 63,000         | \$1,106          | \$40            | 27.5                    |
| North East Region             | 31,000         | \$624            | \$63            | 10                      |
| Phillip Island                | 50,000         | \$357            | -               | -                       |
| Yarra Valley                  | 48,000         | -                | -               | 20.4                    |

Source: Business Victoria, Regional Tourism Summaries, Year Ending September 2018.

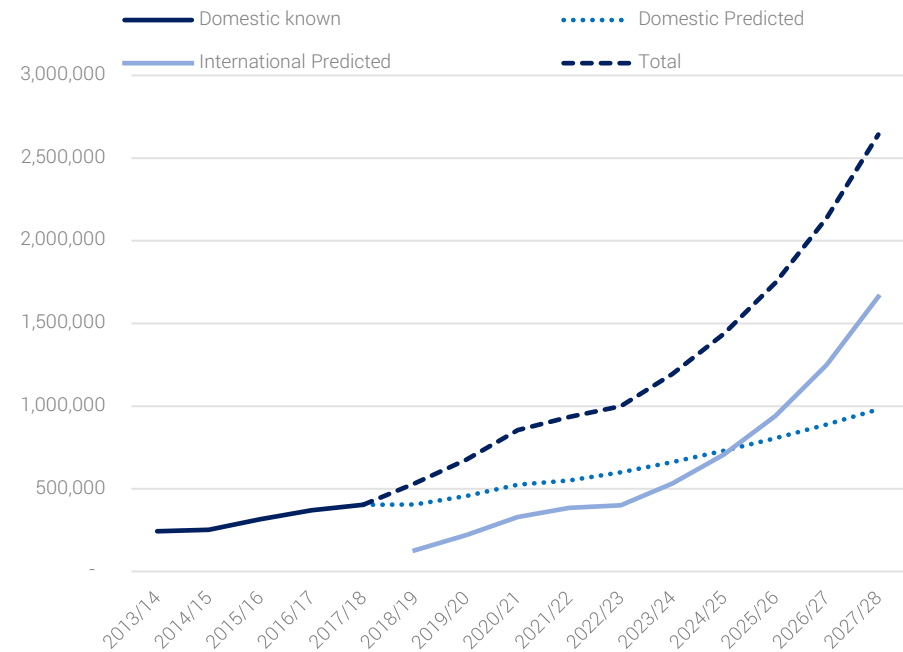
## PREDICTED INTERNATIONAL VISITATION

Figure 18 shows the current inbound passenger numbers for Avalon Airport, and the predicted passenger numbers to 2027/28. Domestic passenger numbers have been modelled using Jetstar as the only domestic airline, and international passengers have been modelled using AirAsia as the only international airline operating till 2027/28.

Total inbound passengers are predicted to reach approximately 2.6 million, with approximately 1.6 million of these international passengers.

**Although it is likely that a proportion of these passengers will be in transit and not staying in the Greater Geelong and the Bellarine region, the introduction of international flights to the region provides a significant opportunity to capture increased international travellers and convert them into daytrip or overnight visitors.**

**FIGURE 18** PROJECTED PASSENGERS. INBOUND TO AVALON AIRPORT



Source: Avalon Airport.

### 3.4. TARGET MARKETS

This section provides a brief discussion on the Brand Geelong, informed by a 2014 perceptions study undertaken by Tourism Greater Geelong and The Bellarine and Galeforce Strategic Marketing. This following information was developed from this study, which identified target markets for Greater Geelong.

These target markets are still the most relevant target markets for Geelong and the Bellarine region.

#### 3.4.1. BRAND GEELONG

In 2014, Tourism Greater Geelong and The Bellarine, in collaboration with Galeforce Strategic Marketing, conducted a brand perception survey to evaluate the current state of Brand Geelong in the eyes of the consumer and local industry.

The findings were that there was no single Brand Geelong in the eyes of both consumer and industry, and if there was it was a very weak image. There was a perception that the city's offerings were too diverse for one singular image, and that Geelong was identified as going through a transitioning economy. The waterfront was identified by the vast majority of respondents as the key feature of Geelong, and overall sentiment was positive, describing the region as relaxed, interesting and friendly.

Conclusions were that Geelong is positioned well for change, and that the Brand Geelong is not broken but rather unknown and unclear. Recommendations included to develop, manage and protect Geelong as a master brand as a marketing priority, to increase awareness for the city and its attributes through more intensive marketing efforts, and build on the appreciation of Geelong as a place of connection, reinvention and discovery.

#### 3.4.2. TARGET MARKETS

The key target markets identified in the Brand Geelong study by Galeforce Strategic Marketing were Roy Morgan's Helix Persona's Leading Lifestyles and Metrotechs markets, residing in Geelong and Melbourne. Profiles of these markets are described below.

##### LEADING LIFESTYLES



Leading lifestyles are high income families, typically owning their own home in the inner suburbs. This market accounts for 24% of the population with an average household income of \$120,000 p.a.

Leading Lifestyles are highly educated and highly paid professionals, managers and white-collar workers in finance and business, law, media and the arts. Money is earned, invested and distributed—to younger family members, local schools and art groups, worthy charities—without question that the cycle will continue indefinitely.

They believe in their own genuine stake in society, not only as participants but as authors: their opinions matter, and they take seriously the mantle of influence.

Amongst the other Roy Morgan Helix Persona communities, the Leading Lifestyles community accounts for 24% of the Australian population aged 14 and above. Within this community, the 'Successful Bureaucrats' and 'Financial Freedom' Persona types were recommended by Galeforce Strategic Marketing as key target markets from the Roy Morgan Helix Persona's Leading Lifestyles community.

'Successful Bureaucrats' persona types (2.2%) are well-educated young families/couples, who are fond of destinations offering both cultural and seaside experiences. They enjoy art galleries/museums, coffee, wine, and restaurants, and buying technological products.

'Financial Freedom' persona types (1.8%) are predominantly wealthy mid-life couples (typically with teenage children), and are high domestic travellers. They are tech-savvy, enjoy the cinema, shopping for homewares, and also watching reality television programs.

### **IMPLICATIONS**

The Leading lifestyles segment has interest in a broad range of products and experiences matched to the Greater Geelong and The Bellarine region. This segment would be interested in the growing arts and cultural scene in Geelong and the food and lifestyle experiences on The Bellarine Peninsula.

This market has a strong preference for seaside destinations. Competitor destinations in Victoria also targeting this market include Surf Coast (e.g. Lorne, Anglesea) and the Mornington Peninsula (e.g. Sorrento, Rye).

In order to grow this market further, focus needs to be made on providing contemporary experiences including quality dining, farm gate and food attractions on The Bellarine and further develop interesting niche arts and cultural experiences in Geelong.

A combination of coastal, nature-based settings and experiences with other quality lifestyle and indulgence activities provides a strong setting for capturing this market.

### **METROTECHS**



Metrotechs are young, single, well educated, inner city professionals with high incomes, typically renting apartments. They are cultured, connected, clued-in & cashed up. This market accounts for 13% of the population with an average household income of \$109,000 p.a. You'll find Metrotechs in capital cities, working hard to get ahead in the finance, property, business and IT industries.

They're an ambitious bunch: young, educated and willing to put in the hard yards to fulfil their professional dreams. But this doesn't stop them enjoying life: they play almost as hard as they work.

Usually single or de facto, often from Asian or European backgrounds, their high salaries afford an upwardly mobile lifestyle – tempered with a strong social conscience.

Amongst the other Roy Morgan Helix Persona communities, the Metrotechs community accounts for 13.2% of the Australian population aged 14 and above. The 'Social Flyers' Persona type (0.7%) was recommended by Galeforce Strategic Marketing as a key target market from the Roy Morgan Helix Persona's Metrotech community.

'Social Flyers' are the most likely type within the Metrotech community to spend their leisure time visiting and exploring other areas in Australia and have a distinct preference for urban destinations which offer cultural and entertainment experiences.

They are often from non-Australian backgrounds, are young, educated, are living in inner-city areas, and are highly engaged in social media. They enjoy art galleries/museums, fashion, bars and nightclubs, travel, restaurants and wine

### ***IMPLICATIONS***

This market segment has strong alignment with the emerging product and experiences in Urban Geelong including Boom Gallery, Pakington St and Little Creatures brewery. The development of new and interesting experiences is required to grow this market. Product that is new and innovative will be attractive to this market.

There are few Victorian destinations that target this market effectively. Ballarat and Bendigo are locations where the product mix is being developed to meet the needs of this market, however in both instances this is still only emerging.

Geelong has potential to be a key destination for this market, however further development of arts and cultural attractions which offer a point of difference is needed. In addition, the retail focus of Geelong CBD would need to transition significantly to meet this market. Smaller destinations such as Pakington Street provide a retail setting better suited to this market.

### **TRADITIONAL FAMILY LIFE**

Traditional Family Life, along with its younger counterpart, Conventional Family Life, represents the core of 'middle Australia', with values centred around the significant

events in their personal and family lives. The traditional Family Life and Conventional Family Life Segments are motivated by similar values in terms of security, reliability and providing better opportunities for their family. The Traditional Family Life segment accounts for 20% of the population<sup>7</sup>.

Within Australia, the Traditional Family Life are now generally empty-nesters or extended families. With their children grown their focus is on re-building their relationship with one another and finding time to do things they never could while their children were growing up. But with such a strong focus on the family, they spend a great deal of time and energy getting the family to visit them, babysitting, weekend BBQs and buying lollies for the grandkids, which their parents won't let them have.

Not liking change, old and familiar environments are important in the Traditional Family Life Segment.

### ***IMPLICATIONS***

Whilst Lifestyle Leaders and Metrotechs are markets which are drawn to contemporary new experiences, the region is still well matched to the experience and product profile of Traditional Family Life Segments (particularly the Bellarine Peninsula). Family holidays, going to the beach and camping are common activities in the region which continue to attract the Traditional Family Life market.

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<sup>7</sup> Holiday Tracking Study, Roy Morgan Research via Great Ocean Road Destination Management Plan, 2011

## 4. PRODUCT AND TOURISM DEVELOPMENT IN GREATER GEELONG AND THE BELLARINE

### 4.1. INTRODUCTION

Urban Enterprise undertook a comprehensive tourism product audit to inform this Tourism Development Strategy Update. Information was sourced from a database of tourism businesses from Tourism Greater Geelong and The Bellarine, through online research of accommodation listings and attractions, and enhanced through consultation with Local Government Authorities and additional stakeholders.

Information on tourism establishments and the region's attractions were categorised by the following product types:

- Accommodation;
- Business and Conference market;
- Food and beverage;
- Nature-based tourism;
- Events and festivals;
- History and heritage,
- Arts and culture; and
- Retail.

It is important to note that Geelong has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN). This recognition of Geelong as a creative city, one of only 31 in the world, means Greater Geelong has an ongoing responsibility to uphold a high standard of design and quality for all future developments, projects and infrastructure.

### 4.2. KEY FINDINGS

**Greater Geelong and The Bellarine has primary strengths in nature-based attractions. These attractions are 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, particularly in the peak summer season.**

**The other area of primary strength is in events and festivals with Geelong hosting numerous sporting and recreation events, some of global significance. The Australian International Air show, Cadel Evans Great Ocean Road Race and Meredith Music Festival are examples of high-profile events held in 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 that has been designated as a City of Design by the UNESCO Creative Cities Network (UCCN).**

**There is limited hotel/motel style accommodation in Geelong Urban for the events market (business, sporting and food). Development of 4-5-star quality accommodation is a key opportunity for Geelong Urban and will support the proposed investment in the Geelong Convention and Exhibition Centre.**

**There is very limited commercial guestroom accommodation in Bellarine North and Bellarine South (20% and 34% respectively). This presents a strong opportunity to grow overnight visitation in the region.**

**Key new investments since 2015 include development of Avalon international air terminal, Flying Brick Cider Co, Curlewis Golf Club redevelopment including the Range, 360Q restaurant and several small high-end boutique accommodation offers. Further to this, the QTrain and several high-end profile restaurants have strengthened the regions food and beverage offering.**

#### 4.2.1. PRODUCT STRENGTHS

Primary product strengths in the Greater Geelong and The Bellarine region are nature-based tourism and festivals and events, including business events.

Secondary strengths are food and wine, wildlife, arts and culture, golf and history and heritage. Spa and wellbeing is an emerging product strength, with the development of spa accommodation such as Lon Retreat and Spa.

**TABLE 14** PRODUCT STRENGTHS

| PRODUCT            | GEELONG & THE BELLARINE | MORNINGTON PENINSULA | PHILLIP ISLAND | SURF COAST |
|--------------------|-------------------------|----------------------|----------------|------------|
| Food & Wine        | ●                       | ●                    | ●              | ●          |
| Spa & Wellbeing    | ●                       | ●                    |                | ●          |
| Wildlife           | ●                       | ●                    | ●              | ●          |
| Nature-based       | ●                       | ●                    | ●              | ●          |
| Arts & Culture     | ●                       | ●                    |                |            |
| Indigenous         |                         |                      |                | ●          |
| Golf               | ●                       | ●                    |                | ●          |
| Adventure          |                         |                      |                | ●          |
| History & Heritage | ●                       |                      |                | ●          |
| Festivals & Events | ●                       | ●                    | ●              | ●          |
| Business Events    | ●                       | ●                    | ●              |            |
|                    | ● PRIMARY               | ● SECONDARY          | ● EMERGING     |            |

#### 4.2.2. NICHE PRODUCT STRENGTHS

The Greater Geelong and The Bellarine region has a number of product strengths that allows the region to market itself to niche product markets that may cut across various psychographics segments. Targeted development and marketing of product within these niche product areas could lead to greater market capture. Niche product markets include:

- Golf;
- Cycling;
- Recreational fishing and boating;
- Business events and MICE;
- Diving;
- Weddings; and
- Signature events.

**Further investigation of these markets by Geelong and the Bellarine should be undertaken in order to target them effectively**

### 4.3. PRODUCT DISPERSAL

#### 4.3.1. ACCOMMODATION

An accommodation product audit of the Greater Geelong and The Bellarine region counted 257 establishments across a range of accommodation types, with a total of 5,590 rooms (including caravan sites). This includes approximately 40 new accommodation establishments.

A profile of accommodation types is shown below in Table 15. This audit focuses on commercial accommodation and not Air B&B or holiday home rentals.

Table 16 shows that the majority of accommodation establishments are located in the Queenscliff and Point Lonsdale tourism sub-region, followed by Geelong Urban. Accommodation establishments in Queenscliff and Point Lonsdale are mostly single Self-contained/Holiday Home establishments, followed by B&B/Guest House, whereas Geelong Urban offers predominately larger Hotel/Motel accommodation. (Note: Self-contained/Holiday Home establishments included in the product audit were listed commercially for rent; private holiday home accommodations were not included.)

There is a clear lack of accommodation establishments located in the Avalon & the You Yangs and the Southern Golden Plains sub-regions.

Across Greater Geelong and The Bellarine region, there is a low supply of Resort, Farm Stay and Backpacker accommodation establishments

**TABLE 15** PROFILE OF ACCOMMODATION, GEELONG AND BELLARINE REGION

| Type of Accommodation           | Number of Establishments | % of Total Establishments | Rooms       | % of Total Rooms | Sites       |
|---------------------------------|--------------------------|---------------------------|-------------|------------------|-------------|
| Camping/Caravan Park/Cabin Park | 21                       | 8%                        | 935         | 30%              | 2515        |
| Self-contained                  | 130                      | 51%                       | 844         | 27%              | 0           |
| Hotel/Motel                     | 37                       | 14%                       | 788         | 26%              | 0           |
| B&B/Guest House                 | 36                       | 14%                       | 192         | 6%               | 0           |
| Apartment/Cottage/Unit          | 27                       | 11%                       | 203         | 7%               | 0           |
| Resort                          | 1                        | 0%                        | 80          | 3%               | 0           |
| Farm Stay                       | 2                        | 1%                        | 4           | 0%               | 0           |
| Backpacker                      | 3                        | 1%                        | 29          | 1%               | 0           |
| <b>Total</b>                    | <b>257</b>               | <b>100%</b>               | <b>3075</b> | <b>100%</b>      | <b>2515</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

**TABLE 16** ACCOMMODATION, ESTABLISHMENTS BY SUB-REGION

| Tourism Region               | Camping/Caravan Park/Cabin Park | Commercial Self-contained | Hotel/Motel | Apartment/Cottage/Unit | B&B/Guest House | Resort   | Farm Stay | Backpacker/Lodge | Total Establishments |
|------------------------------|---------------------------------|---------------------------|-------------|------------------------|-----------------|----------|-----------|------------------|----------------------|
| Avalon & The You Yangs       | 0                               | 1                         | 0           | 0                      | 1               | 0        | 0         | 0                | 2                    |
| Golden Plains South          | 0                               | 1                         | 0           | 2                      | 1               | 0        | 1         | 0                | 5                    |
| Geelong Urban                | 6                               | 21                        | 25          | 6                      | 4               | 0        | 1         | 1                | 64                   |
| Bellarine North              | 3                               | 12                        | 3           | 5                      | 6               | 0        | 0         | 0                | 29                   |
| Bellarine South              | 7                               | 20                        | 3           | 2                      | 6               | 1        | 0         | 0                | 38                   |
| Queenscliff & Point Lonsdale | 5                               | 75                        | 6           | 12                     | 18              | 0        | 0         | 2                | 118                  |
| <b>Total region</b>          | <b>21</b>                       | <b>130</b>                | <b>37</b>   | <b>27</b>              | <b>36</b>       | <b>1</b> | <b>2</b>  | <b>3</b>         | <b>256</b>           |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

**TABLE 17** ACCOMMODATION, ROOMS/SITES BY SUBREGION

| Tourism Region               | Camping/Caravan Park/Cabin Park | Commercial Self-contained | Hotel/Motel | Apartment/Cottage/Unit | B&B/Guest House | Resort     | Farm Stay | Backpacker/Lodge | Total Rooms (incl. sites) |             |
|------------------------------|---------------------------------|---------------------------|-------------|------------------------|-----------------|------------|-----------|------------------|---------------------------|-------------|
|                              | Sites                           | Rooms                     |             |                        |                 |            |           |                  |                           |             |
| Avalon & The You Yangs       | 0                               | 0                         | 14          | 0                      | 0               | 2          | 0         | 0                | 0                         | 16          |
| Golden Plains South          | 0                               | 0                         | 3           | 0                      | 3               | 4          | 0         | 3                | 0                         | 13          |
| Geelong Urban                | 183                             | 500                       | 258         | 634                    | 161             | 15         | 0         | 1                | 8                         | 1760        |
| Bellarine North              | 965                             | 75                        | 102         | 32                     | 8               | 29         | 0         | 0                | 0                         | 1211        |
| Bellarine South              | 1088                            | 219                       | 167         | 71                     | 7               | 18         | 80        | 0                | 0                         | 1650        |
| Queenscliff & Point Lonsdale | 279                             | 141                       | 300         | 51                     | 24              | 124        | 0         | 0                | 21                        | 940         |
| <b>Total region</b>          | <b>2515</b>                     | <b>935</b>                | <b>844</b>  | <b>788</b>             | <b>203</b>      | <b>192</b> | <b>80</b> | <b>4</b>         | <b>29</b>                 | <b>5590</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

Table 18 shows the comparison between commercial guestrooms and camping caravan/sites. Although there is a greater proportion of commercial guest rooms than camping/caravan sites, cabins within caravan parks make up 17% of the total accommodation in the region.

**TABLE 18** ACCOMMODATION, GUEST ROOMS VS. CARAVAN/CAMPING SITES BY SUBREGION

| Sub-region                                  | Commercial Guest Rooms (incl. cabins) |             | Camping/Caravan sites |             |
|---|---------------------------------------|-------------|-----------------------|-------------|
| <b>Geelong &amp; Southern Golden Plains</b> | <b>1606</b>                           | <b>52%</b>  | <b>183</b>            | <b>7%</b>   |
| <i>Avalon &amp; The You Yangs</i>           | 16                                    | 1%          | 0                     | 0%          |
| <i>Golden Plains South</i>                  | 13                                    | 0%          | 0                     | 0%          |
| <i>Geelong Urban</i>                        | 1577                                  | 51%         | 183                   | 7%          |
| <b>The Bellarine Peninsula</b>              | <b>1469</b>                           | <b>48%</b>  | <b>2332</b>           | <b>93%</b>  |
| <i>Bellarine North</i>                      | 246                                   | 8%          | 965                   | 38%         |
| <i>Bellarine South</i>                      | 562                                   | 18%         | 1088                  | 43%         |
| <i>Queenscliff &amp; Point Lonsdale</i>     | 661                                   | 21%         | 279                   | 11%         |
| <b>Total region</b>                         | <b>3075</b>                           | <b>100%</b> | <b>2515</b>           | <b>100%</b> |

Source: Data compiled by Urban Enterprise from sources including a database of tourism businesses, online research, consultation and direct observations, 2018.

#### 4.4. HOLIDAY HOME ANALYSIS

Private holiday homes make up 6% of the total housing stock within the Greater Geelong and The Bellarine region. Table 19 below shows that the proportion of holiday homes is much larger on the Bellarine Peninsula than the Geelong and Golden

Plains South region, with 42% of housing stock in Bellarine Peninsula being holiday homes, 29% in Bellarine South and 24% in Queenscliff and Point Lonsdale.

**TABLE 19** HOLIDAY HOMES BY SUBREGION

|                                 | Avalon & You Yangs | Golden Plains South | Geelong Urban | Bellarine North | Bellarine South | Queenscliff & Point Lonsdale | Geelong & Bellarine region |
|---------------------------------|--------------------|---------------------|---------------|-----------------|-----------------|------------------------------|----------------------------|
| Number of Private holiday homes | 119                | 119                 | 110           | 2633            | 1804            | 1487                         | <b>6272</b>                |
| Percentage of holiday homes     | 2%                 | 2%                  | 2%            | 42%             | 29%             | 24%                          | <b>100%</b>                |

Source: Data compiled by Urban Enterprise, ABS Census, Occupied dwellings and unoccupied dwellings, 2016.

There are an additional 1,055 Airbnb homes in the Greater Geelong and The Bellarine region. AirBnB is a significant contributor to the tourism economy, however it is highly seasonal in all regions apart from Geelong Urban, which experiences a consistent level of visitation throughout the year. Ocean Grove receives the largest proportion of AirBnB rentals, however this is over the summer period, and over a third of bookings are impromptu (booked between 0-6 days in advance) and are likely to be based on weather.

**Although AirBnB plays a significant role in tourism, it is unregulated and disconnected from tourism in Greater Geelong and the Bellarine. Increased collaboration between AirBnB and the tourism industry and regional tourism board is integral to the expansion of tourism in the region, including the promotion of activities and attractions in the region alongside rental listings and an increase in properties listed year round.**

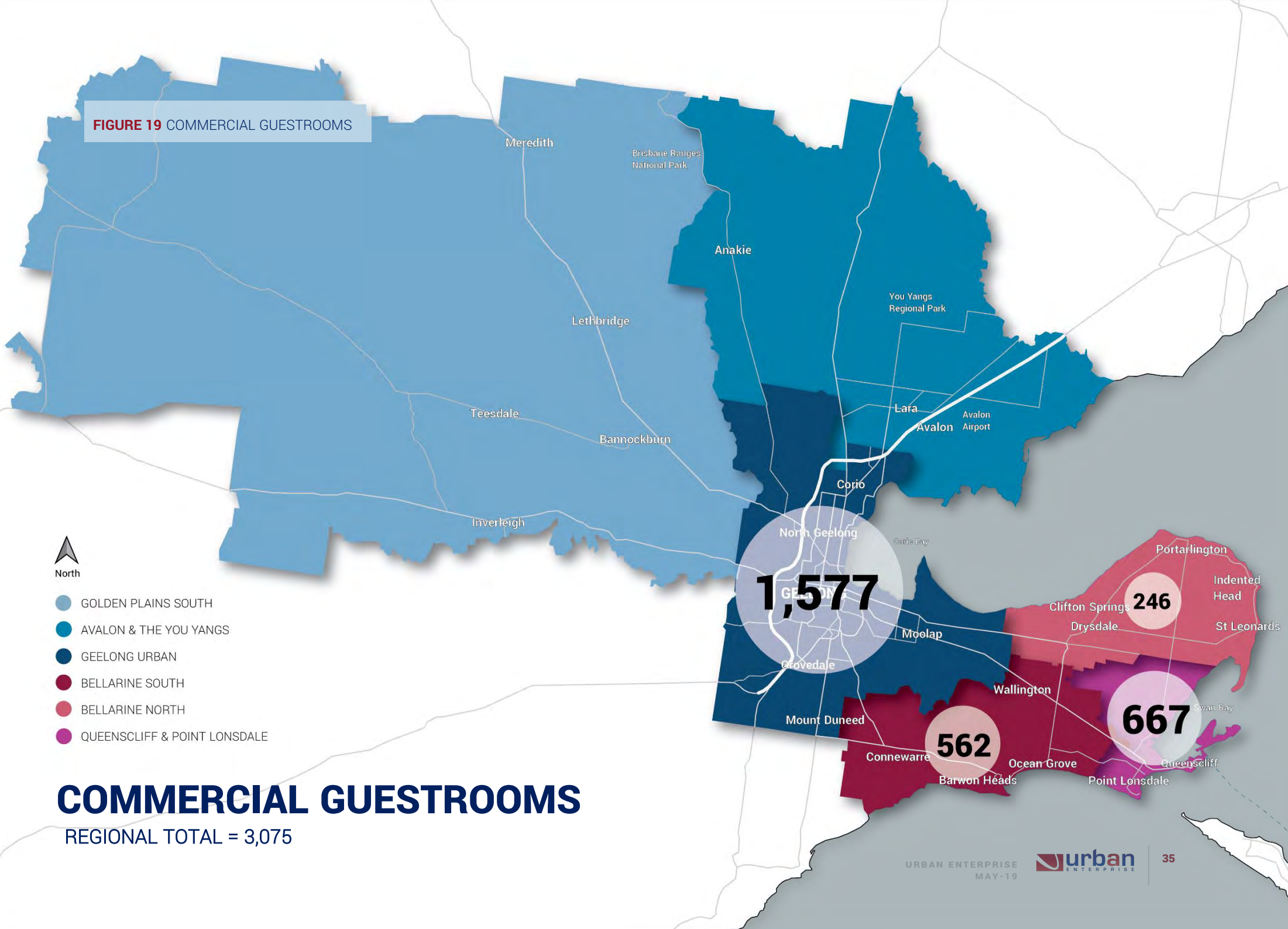
**FIGURE 19** COMMERCIAL GUESTROOMS



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# COMMERCIAL GUESTROOMS

REGIONAL TOTAL = 3,075



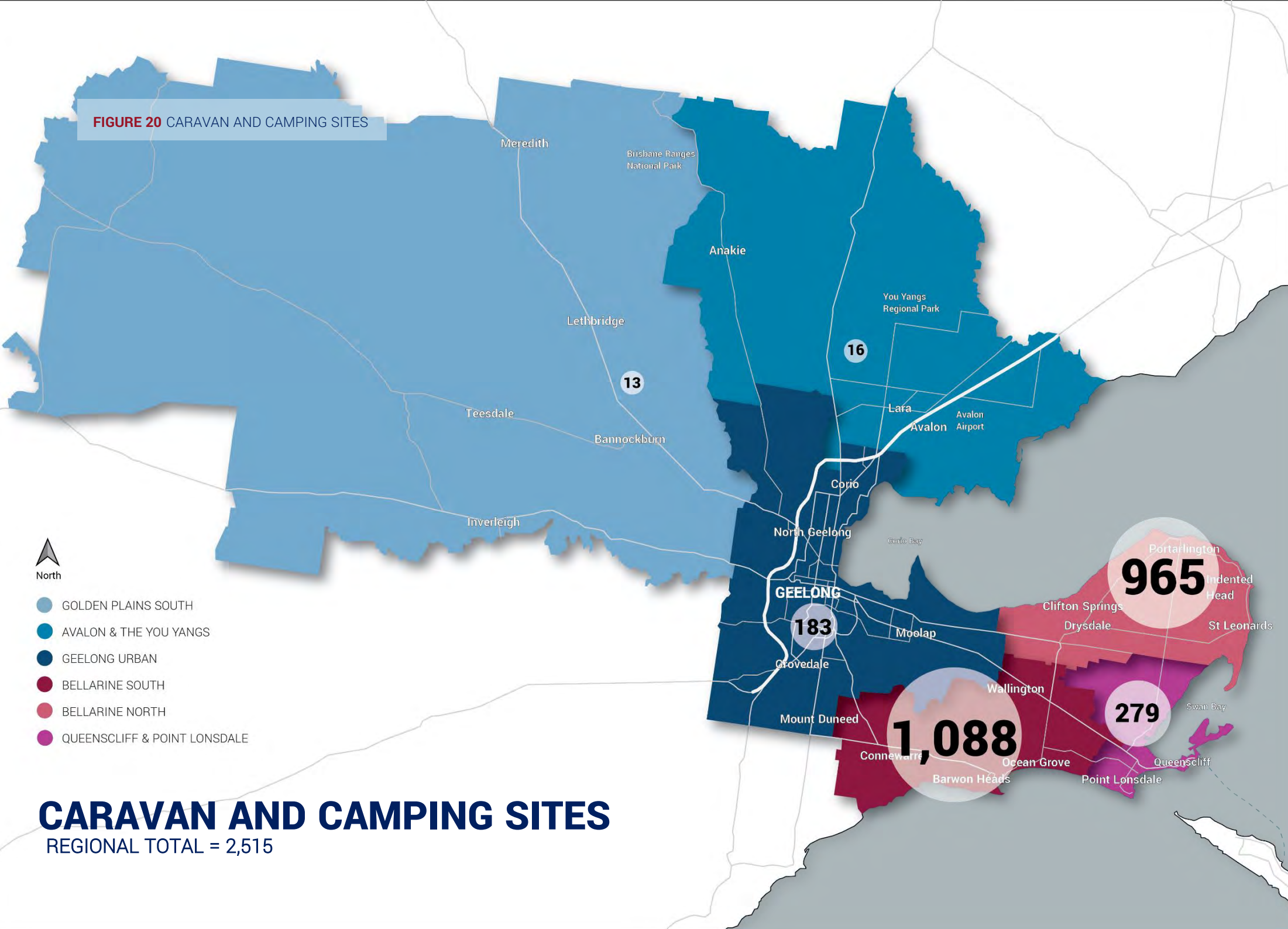
**FIGURE 20** CARAVAN AND CAMPING SITES



- GOLDEN PLAINS SOUTH
- AVALON & THE YOU YANGS
- GEELONG URBAN
- BELLARINE SOUTH
- BELLARINE NORTH
- QUEENSCLIFF & POINT LONSDALE

# CARAVAN AND CAMPING SITES

REGIONAL TOTAL = 2,515



#### 4.4.1. BUSINESS AND CONFERENCE MARKET

Business Events Geelong, a division of Tourism Greater Geelong and The Bellarine is the peak body supporting business events in the region. 33 businesses are listed with Business Events Geelong who undertake business events. It is important to note that there are a significant number of other events facilities catering for smaller scale events. Some of the key facilities are listed in Table 20.

Not included are a number of wineries and restaurants that host business events, conferences and other events such as weddings, including Jack Rabbit Vineyard (200 guests), Oakdene Vineyards (380 guests), Provenance wines (380 guests) and 360Q (240 guests).

**Although there are a significant number of event facilities, there is limited events and conference market accommodation in central Geelong to cater for this growing market. Investment in new 4 and 5 star quality accommodation is a key opportunity for Greater Geelong and Bellarine, particularly in the Geelong Urban sub-region.**

**TABLE 20** KEY BUSINESS EVENT VENUES

| Venue                                  | Maximum Room Capacity Indoor (Cocktail) |
|--|---|
| 13 <sup>TH</sup> Beach                 | 340                                     |
| Clyde Park                             | 800                                     |
| Deakin University @ Costa Hall         | 1,500                                   |
| Edge Geelong                           | 330                                     |
| Flying Brick Cider House               | 400                                     |
| Geelong Conference Centre              | 200                                     |
| Geelong Events Centre (Rydges Geelong) | 1,385                                   |
| Geelong Football Club                  | 4,500                                   |
| Geelong Gallery                        | 550                                     |
| Geelong Library and Heritage Centre    | 350                                     |
| Geelong Performing Arts Centre         | 1,100                                   |
| Geelong West Town Hall                 | 430                                     |
| Mt Duneed Estate                       | 450                                     |
| Novotel Geelong                        | 410                                     |
| Queenscliff Town Hall                  | 300                                     |
| Sphinx Entertainment Centre            | 640                                     |
| Terindah Estate                        | 450                                     |
| The Carousel                           | 150                                     |
| The Geelong Arena                      | 2,600                                   |
| The Pier Geelong                       | 1000                                    |
| Vue Grand Hotel                        | 200                                     |
| Wauron Ponds Estate                    | 470                                     |
| Wool Exchange Entertainment Complex    | 950                                     |

#### 4.4.2. NATURE BASED TOURISM

The Greater Geelong and The Bellarine region is not often associated as a nature-based tourism destination when compared with regions like the North East, Gippsland or the Grampians which have large areas dedicated to National Parks. However, Port Phillip Bay which forms a large part of the region is one of Victoria's major natural assets. Port Phillip Bay hosts a wide range of water-based activities including fishing, swimming, boating, water skiing, diving, sailing and kayaking.

The ocean beaches to the south of the region are also popular tourism assets and drive visitation to destinations on the Bellarine Peninsula such as Barwon Heads, Ocean Grove, St Leonards, Queenscliff & Point Lonsdale. As seen in section 3.2.1, 75% of domestic overnight visitors to the Bellarine Peninsula visit the beach.

Other land-based assets include the You Yangs and Brisbane Ranges. Both are home to unique flora and fauna and host bushwalking. The You Yangs also host a high-quality mountain bike facility.

#### 4.4.3. FOOD AND BEVERAGE

Greater Geelong and The Bellarine already has highly regarded wines, however the tourism product that leverages from these wineries is still in its developing stage. There are two main clusters of wineries within the region, which are The Bellarine and the Moorabool Valley. There are also many wineries that are dispersed through the region outside of these two clusters. Key development alongside these wineries would be investment in on site experiential accommodation.

Greater Geelong and The Bellarine region has an emerging food culture throughout Geelong Urban and the region's villages and coastal townships. There has also been investment in dining, farm gate and cellar door experiences in the rural areas and in particular on The Bellarine, highlighted through such initiatives as the Bellarine Taste Trail and the emerging cider house (Flying Brick Cider) and potential for distilleries.

There has been significant expansion of the wine industry as a whole and the region has a growing reputation for quality wine and produce. Some significant new developments and investments include Basils Farm and One Day Estate

There has also been growth in the agri-tourism sector, with the development of smaller businesses collectively driven the region's growth with agri-tourism and boosting the Bellarine Taste Trail offering.

#### 4.4.4. EVENTS AND FESTIVALS

Sport and events are a strong part of the visitor economy in Urban Geelong. This includes amateur sports tournaments, sailing regattas and AFL matches at Kardinia Park. Major cycling events have also been a key feature of Geelong including the Bay Crits and the newly established Cadel Evans Great Ocean Road Race.

Avalon International Air Show is a key international event for the region and has significant visitation. Meredith music festival is a key national event driving visitation in the Geelong and Southern Golden Plains region.

There are a number of signature arts and culture events in the region, including Geelong After Dark and Mountain to Mouth. Geelong After Dark is a one-night event exploring Geelong by night, with interactive art, street performances, exhibitions, food offerings and more. Mountain to Mouth (M~M) is a 2-day arts walking tour beginning in the You Yangs and finishing at the mouth of the Barwon River, lined with edgy artworks commissioned for M~M and stopping at Geelong After Dark overnight.

Table 21 provides an overview of several major events in the region and their impact on the visitor economy. It is important to note that only those events sponsored by Geelong Major Events Committee have been included.

The event with the largest estimated economic benefit to the region in 2017 is the Cadel Evans Great Ocean Road Race (estimated \$10M benefit), followed by the Archibald Prize touring exhibition exhibited at Geelong Gallery (estimated \$7.2M benefit) and the Geelong Revival Motoring Festival (estimated \$6M benefit).

**TABLE 21** MAJOR EVENT IMPACT SUMMARY

| Event Name  | Sponsorship Amount | Estimated Economic Benefit | Estimated Attendees |
|---|--------------------|----------------------------|---------------------|
| 2018 Cadel Evans Great Ocean Road Race                  | \$150,000          | \$10,000,000               | 80,000              |
| 2017 Archibald Prize @ Geelong Gallery                  | \$100,000          | \$7,211,125                | 58,268              |
| 2017 Geelong Revival Festival                           | \$180,000          | \$5,973,091                | 26,430              |
| 2018 Pako Festa   | \$71,050           | \$5,034,593                | 104,592             |
| 2018 Ironman 70.3 Geelong                               | \$150,000          | \$2,622,550                | 10,735              |
| 2018 Victorian Open Golf Tournament                     | \$70,000           | \$2,591,216                | 21,426              |
| 2017 AFL Masters National Carnival                      | \$40,000           | \$2,154,684                | 1,793               |
| 2018 Geelong After Dark & M~M                           | \$20,000           | \$2,136,540                | 30,644              |
| 2018 National Celtic Festival                           | \$40,000           | \$2,136,126                | 18,102              |
| 2018 Head of the Schoolgirls Regatta                    | \$22,292           | \$2,017,536                | 9,900               |
| 2018 BBL Melbourne Renegades @ GMHBA Stadium            | \$20,000           | \$1,419,066                | 25,000              |
| 2018 U18 National Basketball Championships              | \$15,000           | \$1,368,598                | 2,851               |
| 2017 Targa Florio Australian Tribute                    | \$50,000           | \$1,164,368                | 2,430               |
| 2017 Southern University Games                          | \$35,000           | \$1,152,323                | 1,699               |
| 2018 Wooden Boat Festival                               | \$20,000           | \$1,000,000                | 10,000              |
| 2017 Australian Squash Championships                    | \$5,000            | \$898,011                  | 765                 |
| 2018 SuperFoiler Grand Prix                             | \$40,000           | \$893,741                  | 4,676               |
| 2018 Aust Women's Baseball Championships (Youth & Open) | \$12,000           | \$834,447                  | 656                 |
| 2018 Great Australian Beer Festival                     | \$20,000           | \$827,594                  | 4,755               |
| 2018 A-League Melbourne Victory @ GMHBA Stadium         | \$45,000           | \$714,615                  | 6,682               |
| 2017 FFA Australia v China @ GMHBA Stadium              | \$30,000           | \$646,351                  | 6,406               |
| 2017 Toast To The Coast                                 | \$25,000           | \$540,533                  | 6,154               |
| 2018 Lara Food & Wine Festival                          | \$15,000           | \$454,203                  | 6,405               |
| 2017 Word for Word Festival                             | \$12,500           | \$329,314                  | 2,608               |
| 2018 Geelong Highland Gathering                         | \$12,000           | \$235,112                  | 2,146               |
| 2018 Festival of Sails                                  | \$203,000          | \$10,281                   | 53,717              |

Source: Geelong Major Events Annual Report to Council, 2018.

#### **4.4.5. HISTORY AND HERITAGE**

Geelong Urban has a number of heritage attractions including the National Wool Museum, Geelong Maritime Museum, the Barwon Grange and The Heights heritage properties Geelong Museum of Motoring and Industry, Geelong Carousel, Geelong Heritage Centre, and the Old Geelong Gaol.

The industrial backdrop of Geelong also provides an interesting built form for new development. This has already been utilised in recent developments such as Deakin University, the Little Creatures Brewery, and in the industrial areas of the suburb of Newtown, where establishments such as the Boom Gallery and other arts and design professionals are bringing new life to the area.

The seaside township of Queenscliff is a well-regarded maritime heritage village and includes attractions such as the maritime museum. Further investment is proposed for Fort Queenscliff, Queenscliff Maritime Museum and the Lighthouse Reserves which will provide contemporary heritage visitor experiences.

#### **4.4.6. ARTS AND CULTURE**

Geelong is being increasingly recognised as a key regional arts and culture region, with significant investment in galleries, performing arts, cultural facilities and significant cultural events.

A detailed overview of the arts and culture scene in Geelong Urban can be found in section 7 Geelong Urban subregional profile.

## 5. TRANSPORT, INFRASTRUCTURE AND ACCESS

### 5.1. INTRODUCTION

This section of the report provides an assessment of the transport linkages and access characteristics of the Greater Geelong and the Bellarine region. This section is intended to be used to identify potential gaps in access to the region as well as strategic opportunities for transport network improvements.

The map on the following page provides an overview of the key transport infrastructure in the Greater Geelong and The Bellarine region. The map includes key road networks, the rail network and train stations, airports, harbours, bicycle trails, ferries and key transport hubs.

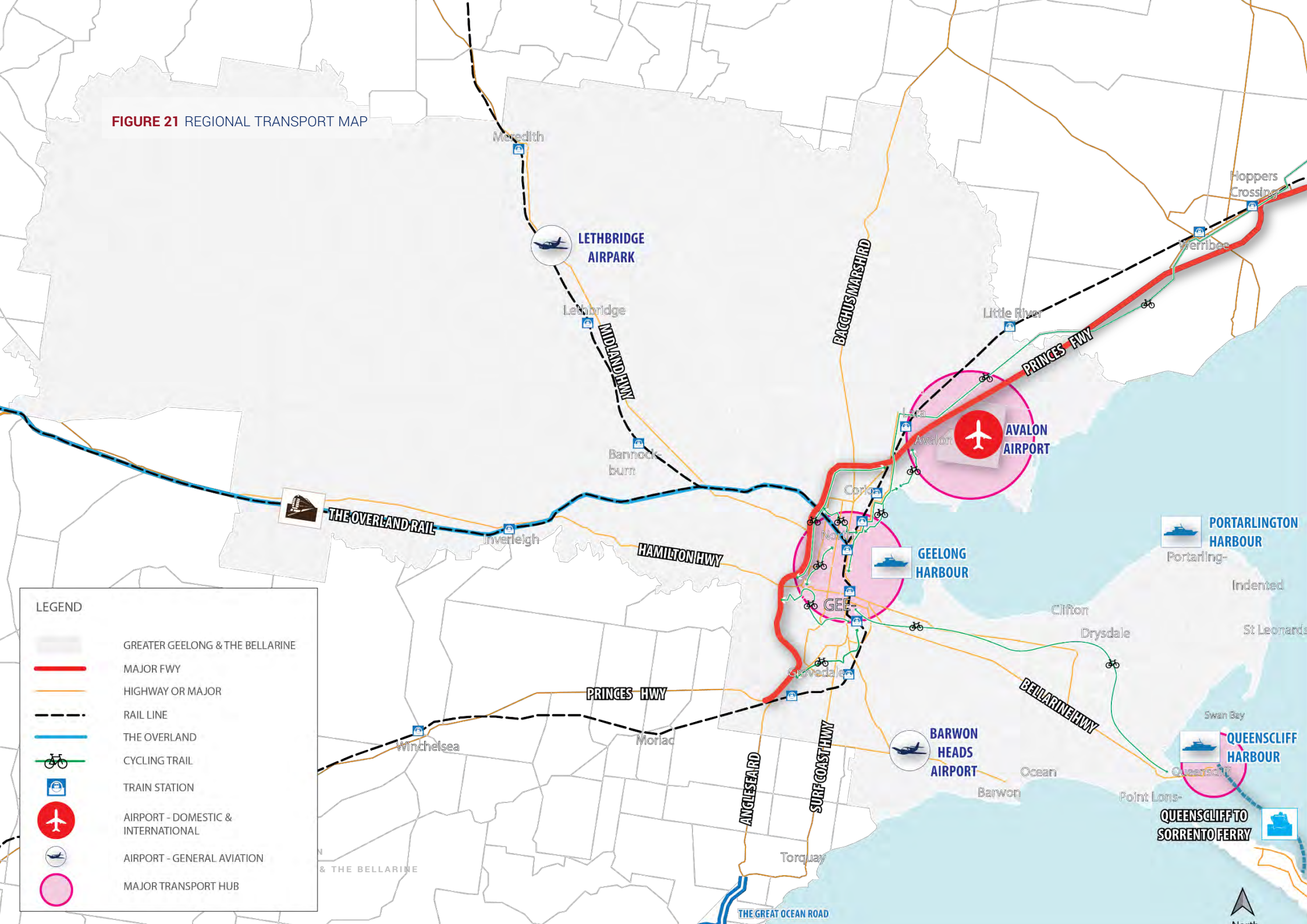
### 5.2. KEY FINDINGS

**The Greater Geelong and The Bellarine region is well serviced by a range of transport infrastructure. The region is accessible by air, sea, rail and road.**










**There are however a number of gaps in the transport links and improvements that require investment to improve visitor access and potentially grow visitation to the region. This includes:**

- **Investment in rail linkages to Avalon Airport and attraction of further international carriers;**
- **High-speed rail proposals;**
- **Completion of Portarlington Harbour redevelopment; and**
- **Investment in the Queenscliff – Sorrento Ferry terminal;**

**FIGURE 21** REGIONAL TRANSPORT MAP



**LEGEND**

-  GREATER GEELONG & THE BELLARINE
-  MAJOR FWY
-  HIGHWAY OR MAJOR
-  RAIL LINE
-  THE OVERLAND
-  CYCLING TRAIL
-  TRAIN STATION
-  AIRPORT - DOMESTIC & INTERNATIONAL
-  AIRPORT - GENERAL AVIATION
-  MAJOR TRANSPORT HUB



### 5.3. STRATEGIC CONTEXT

#### REVITALISING CENTRAL GEELONG ACTION PLAN

The Revitalising Central Geelong Action Plan sets out initiatives designed to turn central Geelong into a magnet for new jobs, growth and investment. The Action Plan will coordinate state and local government involvement in central Geelong – providing focus for structural, policy and physical changes necessary to attract private sector investment and stimulate growth.

The initiatives in the Action Plan fall into five areas of activity. These are:

- **Investment attraction:** The identification and delivery of ‘seed’ projects and identification and removal of barriers to private sector investment.
- **Land development:** Land acquisition and assembly ready for development.
- **Planning certainty:** Review and streamlining of the development approval process.
- **Infrastructure design and delivery:** Infrastructure provision and/or upgrade.
- **People and place:** Improvements to public infrastructure and streets.

This includes a number of key transport, infrastructure and accessibility projects to support the development of the region.

#### DESTINATION ACCESSIBLE

Tourism Greater Geelong and the Bellarine is working in partnership with the Australian Federation of Disability Organisations (AFDO), with an aim to developing Greater Geelong and the Bellarine into a more accessible destination, a more welcoming place for people with disabilities and promoting the idea of accessible tourism.

The strategy includes a program whereby tourism businesses can have their business assessed by an AFDO representative to discuss current business operations, complete a disability-friendly check and makes recommendations on a range of practical, impactful changes that can be made to the business.

This initiative will greatly increase the accessibility of tourism throughout the region, which will in turn increase the number of visitors to the region by enabling those with a disability who are inhibited by accessibility barriers.

Key outcomes of the program include:

- 450 businesses receive information or attend training session;
- 110 businesses undertake 1:1 mentoring; and
- 70 people with a disability are assisted into employment.

### 5.4. TRANSPORT INFRASTRUCTURE, ROUTES AND MODES

Greater Geelong and The Bellarine is well serviced by major transport infrastructure, including road, rail and water transportation both to access the region and for transport within the region. These transport modes are analysed below.

#### 5.5. ROADS

The major access road to the region is the Princes Freeway, this is a 6-lane divide freeway providing direct access from Melbourne to the region. Use of the freeway to access Geelong takes approximately 1 hour. The Princes Freeway connects to the Geelong Ring Road (Geelong bypass), as well as provides direct access to the Midland Highway and Hamilton Highway.

The construction of the Geelong bypass has removed through traffic from Geelong. The Geelong Ring Road links to the Hamilton Highway and to the Princes Highway, which is also used to access the Surf Coast Shire. Works are currently underway to upgrade freight connections from the Geelong Ring Road to the Port of Geelong, in order to support the increased volume of freight traffic in the area since the construction of the Geelong Ring Road in 2013.

The Midland Highway is an important link between Golden Plains Shire and Geelong. Planning for the duplication of the Midland Highway between Geelong and Bannockburn is underway and funding is required to complete road construction.

Other major roads in the region connecting to the north and west include the Midland Highway and the Hamilton Highway. The Bellarine Highway, Barwon Heads Road and Portarlington Road are the major roads on the Bellarine Peninsula linking to Central Geelong. Construction of the Drysdale bypass is expected to begin in 2019, which will connect to Portarlington Road to redirect traffic from the Drysdale town centre.

### **DRYSDALE BYPASS**

The State government has allocated \$117 million to construction of the Drysdale Bypass, which will be approximately six-kilometres long from Jetty Road to north of Whitcombes Road. Construction work has commenced on Whitcombes Road, and the Bypass is expected to be complete by mid-2020. The bypass will provide significantly improved access to and from the town centre, and the removal of some through traffic and heavy vehicles from the Drysdale town centre could have positive impacts for the hospitality and tourism role of the town centre.

### **WAURN PONDS DUPLICATION PROJECT**

Planning is currently underway to identify a preferred alignment for the construction of a rail link from Marshall Station to Armstrong Creek, as part of the Waurn Ponds Duplication Project. The State Government has commenced securing land for the new rail link and has begun planning for construction of the rail link.

The Waurn Ponds Duplication Project is expected to create almost 1,300 jobs, with work to start in 2020 and finish by 2023.

## **5.6. AIRPORTS**

Greater Geelong and The Bellarine is well serviced for air travel with one major airport at Avalon and two smaller regional airports at Lethbridge and Barwon Heads.

**Greater Geelong and The Bellarine is well serviced by airport infrastructure. The recent development of Avalon airport international terminal will provide a significant asset to leverage increased visitation (both domestic and international) to the Greater Geelong and The Bellarine region. The construction of the Avalon Rail Link is a priority project to grow the role of the Avalon Airport. Both Barwon Heads Airport and Lethbridge Airport play a vital role in servicing the region for recreational and tourism flying services.**

### **5.6.1. AVALON AIRPORT**

Avalon Airport is the region's major airport and Victoria's second largest airport. The airport was purchased by Linfox Group in 1997 from the Commonwealth, and Jetstar began operating from the facility in 2004. The Airport is a commercial airline facility operating a domestic airline terminal, with the recent development of an international terminal as of December 2018.

Air Asia has signed a 10-year deal with Linfox Group, and launched its first international services from Avalon Airport in December 2018, providing twice daily flights to Kuala Lumpur. It is expected that this new service will bring 500,000 passengers in the first year.

The Airport is located approximately 55 kilometres from Melbourne (40 minutes by car) and 20 kilometres from the Geelong CBD (15 minutes by car). The Airport offers bus transfers to Geelong, the Bellarine, the Surf Coast, Werribee and Melbourne.

Furthermore, the State Government has committed to supporting Avalon Airport as the host of the Australian International Airshow until 2025, which will bring large numbers of visitors into the region.

## PASSENGER MOVEMENTS

The Avalon Airport Master Plan provides forecasts of passenger movements through Avalon Airport to 2030/31. These are shown below. Passenger numbers are expected to increase to over 9 million in 2030/31, 7 million of which are domestic passengers and 2 million international passengers. The significant number of passenger movements provides a strong opportunity for the region to leverage increased tourism visitation and development of tourism infrastructure and product catering to the international market.

| Year    | International | Domestic  | Total     |
|---------|---------------|-----------|-----------|
| 2018-19 | 489,000       | 1,964,000 | 2,454,000 |
| 2023-24 | 960,000       | 3,559,000 | 4,519,000 |
| 2029-30 | 1,926,000     | 6,466,000 | 8,393,000 |
| 2030-31 | 2,196,000     | 7,248,000 | 9,444,000 |

Source: The Bureau of Infrastructure, Transport and Regional Economics (BITRE) – Avalon Airport Master Plan, 2015.

### 5.6.2. OTHER AIRPORTS

#### BARWON HEADS AIRPORT

The Barwon Heads Airport is a public use, private airfield. It is located on Barwon Heads Road, approximately 14 km south east of Geelong. The airport is well located to provide aeronautical tourism for The Bellarine as well as the Great Ocean Road Region. The airport includes commercial tourism related operations, including:

- Skydiving;
- Helicopter flights; and
- Aerobatic flights (Warbird Adventure Flights).

#### LETHBRIDGE AIRPORT

The Lethbridge Airport is located approximately 33 km north west of Geelong on the Midland Highway. It is home to numerous businesses and clubs that cover a range of activities including joy flights, flying lessons and plane building. The Lethbridge Airport is strategically located to service the northern and western regions of Greater Geelong and The Bellarine as well as beyond the region.

Lethbridge airport is currently under development, with completed development of new infrastructure including:

- a new sealed runway and hardstand area
- taxiway and apron upgrades, and
- installation of self-service fuel infrastructure.

### 5.7. RAIL

The map on the following page provides an overview of the train lines that operate in Victoria and Greater Geelong and The Bellarine's connection with Victoria's regions through rail infrastructure. The Greater Geelong and The Bellarine region is well supported by rail infrastructure with V/Line operating passenger services between the Greater Geelong and The Bellarine and Melbourne. Geelong acts as a central hub for multiple train lines. Geelong is also a central hub for passenger train services to Western Victoria, including services to Warrnambool and Ararat.

Great Southern Rail operate The Overland, a passenger service between Melbourne and Adelaide, via North Shore Station in Geelong. The Overland operates from Adelaide to Melbourne on Mondays and Fridays and from Melbourne to Adelaide on Tuesdays and Saturdays. The Overland also provides a motorail service, where passengers can transport their vehicles on board the train.

Services depart from North Shore Geelong at 9.42 on Tuesdays and Saturdays and arrive at Adelaide at 5.53pm. The fares for The Overland for 2018/19 are shown in Table 22. A single one-way adult ticket ranges from \$159 (red service) to \$2599 (red premium service).

**TABLE 22** THE OVERLAND FARES

| \$ Per Person One Way   | Everyday | Pension Saver | Ready Rail | Ready Rail SAVER |
|---|----------|---------------|------------|------------------|
| Adelaide-North Shore<br>Geelong/Melbourne or vv - Red Service                                   | 159      | 79            | 109        | N/A              |
| Adelaide-North Shore<br>Geelong/Melbourne or vv - Red<br>Premium Service (all-inclusive dining) | 259      | 209           | 209        | 159              |

Source: Great Southern Rail Fares 2018/19

\* Fares based on twin share per person with single supplements applicable

**FIGURE 22** GEELONG & BELLARINE REGIONAL TRAIN NETWORK CONNECTIONS



Source: Urban Enterprise, 2018.

Geelong has direct rail services linking to Melbourne, however the V-Line rail system is at capacity and the railway line is not meeting the demands of users. Further rail services and fast rail are options being considered by State Government.

The Overland is the predominant tourism train service in the region connecting Adelaide and Melbourne, via North Shore Geelong. The construction of the Avalon Rail Link will provide a critical link to the existing rail network.

## 5.8. WATER TRANSPORT AND INFRASTRUCTURE

### 5.8.1. QUEENSLIFF TO SORRENTO SEAROAD FERRY

The Queenscliff to Sorrento car and passenger Searoad Ferry is a critical piece of sea transport infrastructure connecting The Bellarine with the Mornington Peninsula. The ferry carries over 900,000 people and 250,000 vehicles per year. The journey takes approximately 40 minutes and departs on the hour, everyday between 7am and 6pm. The equivalent journey via road takes approximately 2 hours and 45 minutes. The ferry provides an efficient and interesting mode of transportation between the Mornington Peninsula and The Bellarine.

The Searoad ferry is a tourist attraction in its own right, providing views of The Bellarine Peninsula, Mornington Peninsula and landmarks throughout Port Phillip Bay.

Package deals are also provided through the Searoad website, including packages with Flying Brick Cider House and Bellarine Railway. These deals provide incentives to visitors to utilise the Searoad ferry as well as increase visitation to destinations and attractions in Greater Geelong and The Bellarine.

### 5.8.2. GEELONG HARBOUR

Geelong harbour is the largest harbour in the Greater Geelong and The Bellarine region, where cruise ships and recreational boats moor. The Geelong Harbour includes the Royal Geelong Yacht Club, Cunningham Pier, the Geelong Star and the Eastern Beach precinct, including the Eastern Beach recreation reserve, playground and children's swimming pool.

Although cruise ships currently visit Geelong, an increase in the infrastructure capacity would significantly increase the capacity of cruise ships to visit the region each year, bringing with it an influx of visitors and expenditure.

Port Phillip Ferry Services have recently announced a ferry service between Geelong and Melbourne, which will begin in 2019 and will provide alternative and luxury travel options for tourists and residents alike.

### 5.8.3. QUEENSCLIFF HARBOUR

Queenscliff Harbour offers 6 to 25 metre marina berths, drystack facilities, 150 metre travelift, serviced boatyard, mechanical and maritime services. The harbour is also a hub for tourism activity including various water based commercial tourism businesses, shops, cafes and restaurants. Activities at the harbour include boat hire, charters (fishing, diving, nature-based tours), various restaurants and retailers and events. There is also a 42-metre observation tower that offers 360-degree views across Port Phillip, Port Phillip Heads, The Bellarine and Mornington Peninsula.

Importantly, Queenscliff Harbour is the destination for the Queenscliff to Sorrento searoad ferry. Appropriate tourist information and services are required for inbound visitors. This information should be aimed at enticing visitors to increase stopovers, length of stay and expenditure.

### 5.8.4. PORTARLINGTON HARBOUR

Portarlington Harbour is a key hub harbour for the seafood industry. The harbour is currently undergoing a major redevelopment under the Portarlington Safe Harbour

project. Stage One infrastructure upgrades were officially completed and opened in December 2017. These included:

- A new commercial berthing wharf including 190 metres of new berthing;
- Construction of 270 m and 370 m rock breakwaters; and
- Additional wave protection works, mooring facilities and ferry pontoon.

**Geelong Harbour provides significant opportunity to establish itself as Victoria's second largest cruise ship destination through the development of Yarra Street Pier. This project would significantly increase the number of visitors and visitor expenditure across Greater Geelong and The Bellarine. It would also create opportunities to leverage new tourism product and infrastructure in the region.**

**The role of Queenscliff and Portarlington Harbours as recreational and tourism hubs should be increased. Projects such as the Portarlington Safe Harbour Project are important in creating further recreational and tourism opportunities in these harbours.**

## 5.9. BUS

The bus links and networks have been analysed for the Greater Geelong and The Bellarine region.

**Urban Geelong is well serviced by a number of bus routes, however the public transport options along the Bellarine Peninsula are limited.**

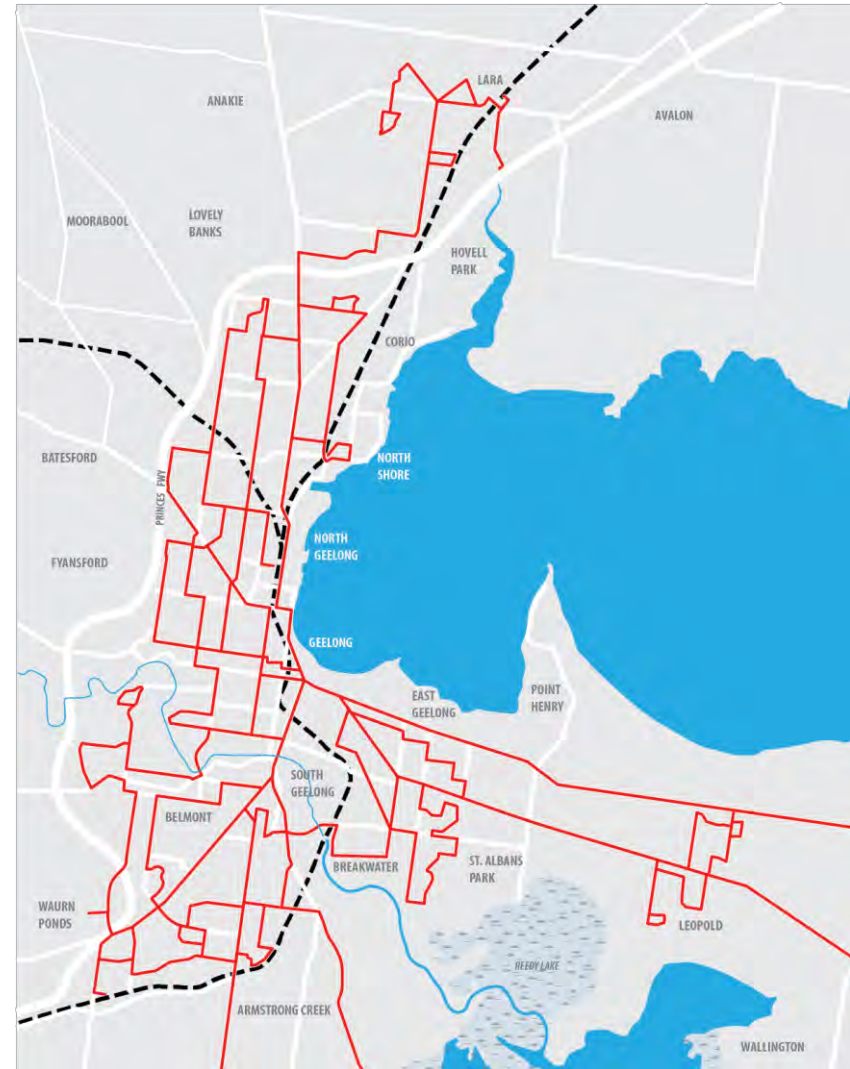
**There may be opportunity to establish a north south bus route that connects Portarlington with Queenscliff. This could be in the form of a direct north-south connection along Portarlington-Queenscliff Road or in the form of a loop connection utilising The Esplanade and Portarlington-Queenscliff Road. The distance between Portarlington and Queenscliff is approximately 17 km.**

**Given that there is limited population settlement along Portarlington-Queenscliff Rd, there would be minimal requirements for stops between Portarlington and Queenscliff. There would also need to be adequate demand for this service for it to be a viable bus route.**

### 5.9.1. GEELONG BUS NETWORK

Figure 23 shows the coverage of the public bus network in Geelong. Geelong is primarily serviced by public buses in the central city area, bordered by the Princes Freeway to the west and north, the coast to the east and rail line to the south. There are no bus links further west beyond the Princes Freeway.

FIGURE 23 GEELONG BUS NETWORK COVERAGE



Source: Bus Routes sourced from Public Transport Victoria

### 5.9.2. BELLARINE BUS NETWORK

Figure 24 shows the coverage of the public bus network across The Bellarine Peninsula. Comparatively, The Bellarine is less serviced by bus transportation than Geelong. There are two key bus routes, one to the north and one to the south. It is evident from the map that there are no north south bus connections.

FIGURE 24 BELLARINE BUS NETWORK COVERAGE



Source: Bus Routes sourced from Public Transport Victoria

## 5.10. RECREATIONAL CYCLING TRAILS

### OVERVIEW

Cycling to Geelong from Melbourne takes approximately 3 to 4.5 hours (google maps approximate time) and primarily follows Old Melbourne Road, adjacent to the Princes Freeway.

Off road cycling routes are an important tourism asset, particularly when co-located with complementary tourism product, such as nature-based tourism assets and end of ride facilities. The majority of cycling trails are located within the central Geelong area, with The Bellarine Rail Trail providing cycling access to The Bellarine. The map opposite shows the key cycling trails, an overview of these trails is provided below.

### TED WILSON TRAIL

The Ted Wilson Trail follows the alignment of the Geelong Ring Road. The trail is a shared path, approximately 12 km long and provides stunning views. The Ted Wilson trail links to the Bay Trail and Cowies Creek Trail.

### BAY TRAIL

The Bay Trail follows the foreshore of Corio Bay from Rippleside Park in Drumcondra to Eastern Beach. The trail consists of shared paths as well as on road routes. The northern section of the trail connects with Cowies Creek Trail and the Ted Wilson Trail.

The southern section of the trail provides access to the Geelong Waterfront area, with a large quantity of tourism related attractions and infrastructure including Eastern Beach and the Baywalk Bollards.

### COWIES CREEK TRAIL

The Cowies Creek Trail runs along Cowies Creek for approximately 4 km and links the Ted Wilson Trail with the Bay Trail. The Trail runs through the Fountain of Friendship Park and provides access to the Bell Post Hill Shopping Centre, Corio Leisuretime Centre and skate park.

### TOM MCKEAN TRAIL

The Tom McKean Trail follows a disused rail line and the Tom McKean Linear Park. The trail connects to the Barwon River Trail.

### BARWON RIVER TRAIL

The Barwon River Trail is a loop trail, approximately 20 kilometres long that follows the Barwon River. The trail provides a picturesque setting along the banks of the Barwon River and links to a number of recreation reserves. The trail includes access to parks, playgrounds, golf courses, wetlands and sanctuaries.

### BELLARINE RAIL TRAIL

The Bellarine Rail Trail is a 35-kilometre trail that follows the historic Geelong to Queenscliff Railway Line. The trail is constructed of compacted, crushed rock and is suitable for all bikes apart from those with racing tyres. The trail provides access to tourism attractions on The Bellarine Peninsula and provides views to the surrounding farmland and coast.

### WAURN PONDS CREEK TRAIL

The Waurn Ponds Creek Trail is approximately 6.4 km long, traversing the Waurn Ponds Creek. The trail provides pleasant surroundings for cyclists and pedestrians and provides access to various reserves, shopping centres and cinemas, the Geelong regional baseball centre and the Waurn Ponds skate park.

### YOU YANGS REGIONAL PARK TRAILS

The You Yangs Regional Park includes a network of purpose-built mountain biking tracks of varying lengths and levels from easy open dirt roads, to technical single-track and extreme downhill. The tracks are discussed further in Section 12.

**The majority of recreational cycling routes are located within Geelong. There is opportunity to increase the number of regional trails throughout the Geelong and the Bellarine that take advantage of unique and picturesque landscapes. These would need to be supported by appropriate trail infrastructure. Further development**

of cycling route infrastructure across the region, including upgrading paths, linking key trails through off road routes and signage would enhance the opportunity to draw in niche cycling visitor markets. Recreational cycling trails should be appropriately marketed through destination websites.

Road cycling would be improved in the region with sealed shoulders along key cycling routes.

## 5.11. TOURING ROUTES

The following touring routes have been found through desktop research into self-drive touring routes across the Greater Geelong and The Bellarine region.

### GEELONG AND THE BELLARINE TOURING ROUTE (VISIT VICTORIA)

The touring route follows the following path:

- Melbourne to Geelong (73 kilometres), includes attractions/stops:
  - Werribee Park Mansion, Werribee Open Range Zoo, Geelong (Geelong Waterfront, National Wool Museum);
- Geelong to Queenscliff (31 kilometres), including attractions /stops:
  - Bellarine Taste Trail, Geelong Wine Region, Portarlington, Queenscliff (historic Fort Queenscliff, Maritime Museum, diving, fishing cruise);
- Queenscliff to Point Lonsdale (5 kilometres), includes attractions/stops:
  - Point Lonsdale, the Rip.
- Point Lonsdale to Barwon Heads (20 kilometres, includes attractions/stops:
  - Golf, fishing, site seeing.

### THE BELLARINE TASTE TRAIL

The Bellarine Taste Trail provides a self-guided or tour guided food and beverage experience across The Bellarine. The Bellarine Taste Trail provides sample itineraries covering specific experiences such as 'Food and Wine', 'Wineries', 'Seafood Experiences', 'Families', 'Couples', 'Girls Getaways', 'Blokes Breaks', 'Romance' and 'Quick and Organised'.

### CONNECTION TO TOURING ROUTES

Greater Geelong and The Bellarine has a long relationship as a partner of Great Southern Touring Route focused on the South West of Victoria. In addition, Greater Geelong and The Bellarine is part of Sydney to Melbourne Touring Route and is also reference and partnered with Melbourne to Adelaide Touring Route.

**Self-drive touring routes are limited in the region. There could be the possibility to develop further product and experience-based itineraries such as The Bellarine Taste Trail. Other itineraries could be history and heritage focussed.**

## 5.12. INFRASTRUCTURE OPPORTUNITIES

The following have been listed as key infrastructure development opportunities for the Greater Geelong and Bellarine tourism region.

- Construction of an Avalon Airport rail link;
- Development of Geelong Convention and Exhibition Centre;
- Redevelopment of Geelong Waterfront into a Safe Harbour Precinct;
- Investigation and development of fast Rail to Geelong;
- Development of cruise ship infrastructure along Geelong Waterfront;
- Investment into tracks and trails in Queenscliff and Point Lonsdale;
- Expansion and redevelopment of Lethbridge Airport;
- Development of an iconic Barwon Coast walking trail; and
- Development of Portarlington Safe Harbour.

Secondary infrastructure opportunities have been identified as:

- Gateways and signage improvement for Geelong Urban;
- Planning study to reimagine the Geelong Port foreshore;
- Road cycling maps and app development for Geelong Urban;
- Improvement to the cycling and walking trails network in Bellarine North; and
- Wayfinding signage in Bellarine South.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



## 6. PROJECTED DEMAND

### 6.1. INTRODUCTION

This section provides modelling to determine projected demand for tourism product in Greater Geelong and The Bellarine region. This draws on modelling of visitation and identifies what this means in terms of demand for accommodation and other activities and product in the region.

### 6.2. KEY FINDINGS

**Urban Enterprises demand modelling for future visitation utilises four scenarios including, historic visitation, Visit Victoria forecasting, population growth rate and Tourism Research Australia forecasts. The mid-point forecast of these scenarios shows that visitation to Greater Geelong and the Bellarine is projected to increase from 5.8 million visitors in 2018 to 7.5 million visitors by 2027.**

Utilising this forecast, there will be a need to deliver an additional 1564 guest rooms in the Geelong and Bellarine region to ensure that the region's tourism potential is met.

To meet projected need from overnight visitors investment in accommodation should occur in the following:

- Boutique guest house and self-contained accommodation;
- Quality contemporary budget accommodation;
- Large self-contained accommodation/ serviced apartments;
- Boutique hotels;
- 4.5-5 star branded hotels;
- Caravan and camping ground/tourist park;
- Integrated Resorts; and
- Experiential accommodation:
  - Quality Farm Stay
  - Golf Course
  - Wineries
  - Nature-based

### 6.3. FORECAST VISITATION

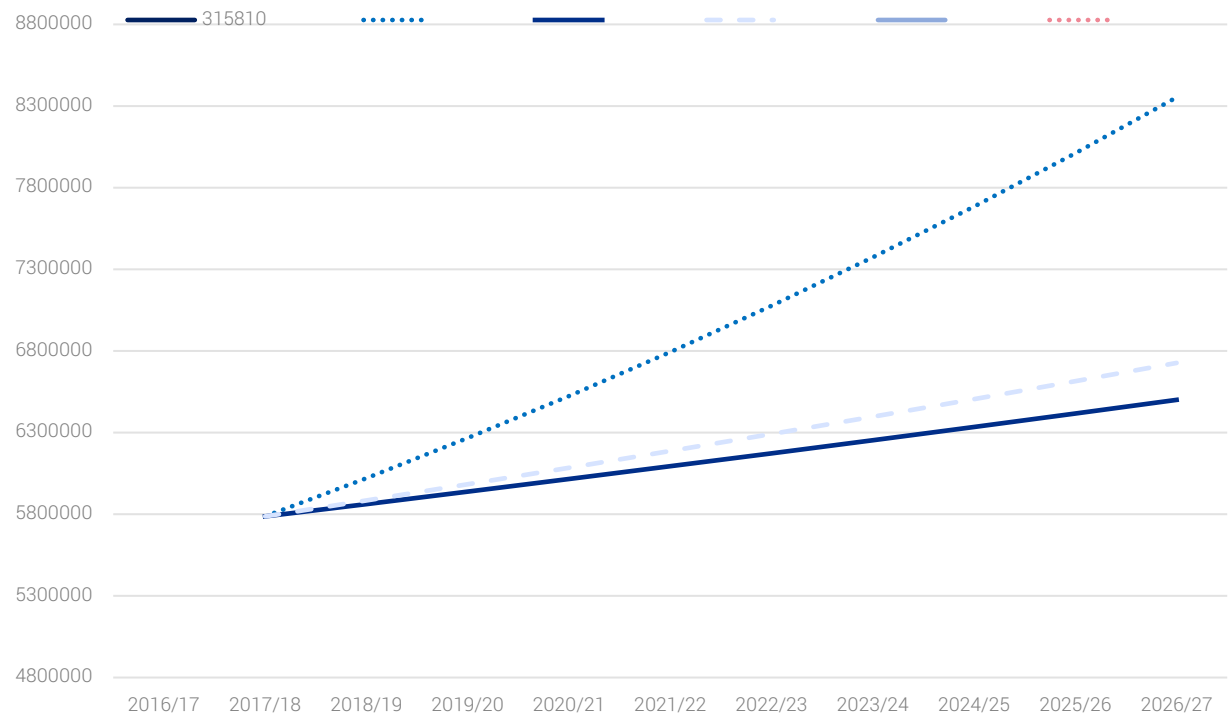
Visitation forecasts are based on the PAVE visitation model which found that in 2018 Greater Geelong and The Bellarine Region attracted 2.3 million overnight and 3.4 million daytrip visitors (both international and domestic visitors).

Three growth scenarios are used to forecast visitor growth. These include:

- Scenario 1: Historical visitation growth model;
- Scenario 2: Tourism Victoria forecast model;
- Scenario 3: Population growth rate model; and
- Scenario 4: Tourism Research Australia forecast model.

The adopted growth rate (mid-point) projects visitation to 7,515,124.

**FIGURE 25** FORECAST VISITATION, GREATER GEELONG AND THE BELLARINE REGION



## 6.4. ACCOMMODATION NEEDS FORECAST

In 2014 there was a total 1,075,134 visitors staying in paid accommodation across Greater Geelong and The Bellarine region<sup>8</sup>. Utilising the visitor growth rates above, it is estimated that there will be an additional 157,795 – 304,575 visitors staying in paid accommodation by 2030.

Based on the projected growth of visitors staying in paid accommodation, Table 23 provides a forecast for accommodation needs.

The analysis utilises the following assumptions:

- Average length of stay per visitor is 3.3 nights;
- Average of 1.7 visitors per room; and
- Average room occupancy of 60% across the year.

This is based on data sourced from National Visitor Survey and ABS Survey of Tourist Accommodation.

Based on this analysis, future additional accommodation needs for the Greater Geelong and Bellarine Region between 2018-2027 is between 1,175 and 2,409 rooms.

**TABLE 23** PROJECTED DEMAND FOR ROOMS/SITES BASED ON VISITOR FORECASTS 2018-2027

|                                      | Low Growth Rate | High Growth Rate | Mid-Point Growth Rate |
|--------------------------------------|-----------------|------------------|-----------------------|
| Visitor growth 2018-2027             | 157,795         | 304,575          | 197,645               |
| Visitor nights                       | 520,722         | 1,005,099        | 652,230               |
| Room nights                          | 306,307         | 628,187          | 407,644               |
| Rooms                                | 839             | 1,721            | 1,117                 |
| Supportable Rooms (at 60% occupancy) | 1,175           | 2,409            | 1,564                 |

## 6.5. ACCOMMODATION TYPE NEEDS

Based on the gaps identified in accommodation and the projected accommodation needs in the region, the following table provides an overview of specific accommodation typologies that may be supported in the region between 2018-2022.

This should be used as a guide for investors and decision makers and provides an outline of the potential scale and type of investment suited to the region.

Number of establishments identified in the table relate to the larger room/site limit identified.

<sup>8</sup> PAVE Model, Urban Enterprise 2015

**TABLE 24** PROJECTED ACCOMMODATION NEEDS BY SEGMENT 2018-2027

| Type   | Description   | Need (# additional establishments to 2027) | Indicative capacity (rooms per establishment) | Total Room/Sites | Location Rural/Urban |
|--|---|--|---|------------------|----------------------|
| Boutique Guest House, B&B and Self-Contained Accommodation | The region does not have a large number of small high-quality accommodation providers with a focus on experiential accommodation. There is opportunity for smaller providers to establish in the region at key locations to provide niche accommodation in urban areas.   | 5  | 10-20 rooms                                   | 108              | Urban                |
| Quality Contemporary Budget Accommodation                  | There is a lack of quality contemporary budget accommodation in the region, both in Urban Geelong and within the region's villages. Urban Geelong should be able to support a large budget accommodation targeting younger markets and budget travellers. Some of the other villages such as Queenscliff have potential to attract international or interstate backpackers with a strong product profile for this market (water-based activities etc), however there is no quality provision of budget accommodation. | 9  | 50-120 rooms                                  | 173              | Urban                |
| Large Self-Contained Accommodation/ Serviced Apartments    | There is growing preference for self-contained accommodation in a number of key markets for the region. This includes the family market, visiting short stay workers (health workers), short stay students and long stay VFR market. There is opportunity to expand this form of accommodation throughout the region, including in some of the key destination and within Urban Geelong.  | 16   | 80-150 rooms                                  | 324              | Urban                |
| Boutique Hotels  | There is opportunity for investment in Boutique high quality hotels throughout the region including in Geelong and in villages such as Queenscliff. There is a lack of quality contemporary accommodation identified across the region.   | 6  | 20-40 rooms                                   | 130              | Urban                |
| 4.5-5 Star Branded Hotel                                   | A large high quality 4.5 – 5 star large branded hotel has been identified as gap in Urban Geelong. Growth in business events, business workers, weekend escapes and the international market would support a facility. It is envisaged that development of a large convention centre would be a catalyst to attracting this facility.   | 16   | 150 rooms-250 rooms                           | 324              | Urban                |
| Caravan and Camping Ground/Tourist Park                    | Rural areas are an attractive location for Camping and Caravan Parks given their natural and rural setting and requirement for large sites. There is already a large provision of this accommodation type across the region, however, Greater Geelong and The Bellarine TDS identified an opportunity for an additional quality or branded tourist park (either on the edge of urban area on in rural zones).   | 4  | 40-80 cabins                                  | 86               | Rural                |
|  |   | 6  | 60-120 sites                                  | 130              |                      |
| Integrated Resort  | An integrated tourist resort which includes quality hotel style or self-contained accommodation as well as a number of other uses such as restaurant, conference centre, recreation, and spa and wellness (either on the edge of urban area on in rural zones). The only example of this on the Bellarine would be the 13th Beach Golf Resort or the BIG 4 Beacon Resort (Queenscliff).   | 9  | 80 - 120 rooms                                | 173              | Rural                |
| Quality Farm Stay  | Given the agricultural strengths of the region, quality farmstay accommodation is a key gap. The growing food and wine tourism market in the Bellarine is well matched with this accommodation type.  | 0  | 3-5 rooms                                     | 9                | Rural                |
| Golf Course  | Golf is an emerging, high yielding market for the region and there is opportunity for other golf clubs to develop accommodation (only Thirteenth Beach Golf Club currently offers accommodation).   | 2  | 20 rooms                                      | 43               | Rural                |
| Wineries   | There are a number of large, well known wineries which already have significant tourism uses (e.g. cellar door, restaurant, events and functions). The development of ancillary accommodation would be a natural step in their growing tourism position on the Bellarine. There is also a smaller cluster of wineries in North Geelong around Anakie.   | 1  | 5-25 rooms                                    | 22               | Rural                |

|              |   |           |             |              |       |
|--------------|---|-----------|-------------|--------------|-------|
| Nature-based | <p>Compared with other regions, Greater Geelong and The Bellarine has a greater farmed and agricultural landscape rather than high value natural landscapes. However, there are key areas which would be suited to nature-based accommodation including:</p> <ul style="list-style-type: none"> <li>-Brisbane Ranges;</li> <li>-You Yangs;</li> <li>-Lake Connewarre;</li> <li>-Swan Bay; and</li> <li>-Appropriate coastal locations.</li> </ul> <p>These areas have significant landscape and environmental value and appropriate design and siting will be required to minimise visual and environmental impact.</p> | 2         | 10-20 rooms | 43           | Rural |
| <b>Total</b> |   | <b>78</b> |             | <b>1,564</b> |       |



**PART B**  
**SUB REGIONAL PROFILES**

## 7. GEELONG URBAN

### 7.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates the Geelong Urban subregion attracted a total of 3.04 million visitors in 2018, including 2.3 million day trip visitors (77%) and 713,356 overnight visitors (23%). Visitation to Geelong Urban accounts for 53% of total trips to the Greater Geelong and the Bellarine region.

The Visiting Friends and Relatives market is important to Geelong Urban, with 52% of domestic overnight visitors primarily visiting for this purpose. As the core commercial district for the region, Geelong Urban also attracts the majority of the region's daytrip Business travel market.

### 7.2. KEY FINDINGS

**Visitation to Geelong Urban accounts for 53% of total trips to the Greater Geelong and the Bellarine region.**

**As the core commercial district for the region, Geelong Urban also attracts the majority of the region's daytrip Business travel market. Business events also present a key strength of Geelong Urban with a number of venues which can host over 200 delegates at a time.**

**Arts and culture has developed into a key tourism product for Geelong Urban, including the Geelong Gallery, Geelong Performing Arts Centre (GPAC), the Newtown artists precinct and the vintage precinct in North Geelong.**

**Key product strengths of Geelong Urban are centred in the foreshore precinct, including the accommodation and hospitality (bars and restaurants) along The Esplanade, and the nature-based activities available at the foreshore parks and Western Beach.**

### 7.3. PRODUCT PROFILE

#### NATURE-BASED TOURISM

The key nature-based tourism product in Geelong is the waterfront area. The beach itself is a key product strength, used for swimming, sunbathing and sports, as is the public children's baths which attract the family market visiting with young children.

The Geelong Botanic Gardens is another natural attraction that is free to access, with additional tourism product available on-site including the Tea House café.

The waterfront is currently undergoing significant revitalisation under the '*Waterfront Geelong – Safe Harbour Precinct*' G21 Priority Project. This will include public realm and leisure area improvements, a series of retail spaces and a public viewing platform, and a number of other boating infrastructure improvements.

#### HISTORY AND HERITAGE

Geelong Urban offers a variety of high-quality history and heritage attractions, including:

- Geelong Maritime Museum;
- Geelong Heritage Centre;
- Old Geelong Gaol;
- National Wool Museum, and
- the Barwon Grange and The Heights heritage properties, both in Newtown, each managed by the National Trust of Australia.

The industrial heritage of Geelong Urban provides opportunity to create an interesting backdrop for various activities, particularly when former industrial sites are transitioned to new contemporary uses. There are currently a number of sites being considered for reuse, such as the Ford site, Osborne house, and the old Geelong Jail.

## ARTS AND CULTURE

Concentrations of arts product can be found in central Geelong, including the Geelong Gallery, Geelong Performing Arts Centre (GPAC), the Metropolis Gallery, the Boom Gallery, and the working studio gallery Art@TheWintergarden.

There has been significant development in the arts and cultural scene in Geelong Urban, with Geelong growing a reputation as a cultural centre. Geelong Gallery is under new management who have a greater entrepreneurial drive and are focused on attracting major exhibitions, as well as pushing to obtain funding for the redevelopment of the Gallery which will more than double its current footprint. The Gallery has an impressive collection and a notable range of exhibitions, including the Archibald Prize exhibition.

Further investment includes Geelong Performing Arts Centre (GPAC), which is currently undergoing a \$38.5 million redevelopment. Geelong Library and Heritage Centre (the Dome) is an award winning and highly recognised building structure that opened in late 2015. The five-storey library building includes multiple libraries, a gallery space, a restaurant/café, dedicated children's and youth floor, public lecture theatres and event spaces, with the upper level dedicated to major events.

There is an emerging artists and design professional's precinct in the suburb of Newtown, driven by the expansion of the Boom Gallery exhibition and co-working spaces, with many artists and small businesses locating at the site and in nearby buildings. (These former industrial buildings were rezoned to mixed use, enabling a mix of creative uses to take place).

There is also an emerging vintage retail precinct in North Geelong, including the Geelong Vintage Market and nearby antiques stores.

## FOOD AND BEVERAGE

There are a growing number of wineries located in the Geelong Urban subregion, predominantly in Waurm Ponds. Few wineries in Urban Geelong have accompanying tourism product such as cellar doors, dining option or function/events spaces, and none offer accommodation onsite. These are detailed in Table 25.

There are a number of new developments, including Little Creature Brewery, White Rabbit Brewery and Provenance Wines. Furthermore, there has been significant investment into wine and beer offerings, including the rejuvenation of Geelong Cellar Door on Little Malop Street.

There has also been significant investment in waterfront and high-quality dining establishments, such as Wah Wah Gee, Le Parisien. and the 2 hatted Restaurant Igni.

**TABLE 25** GEELONG URBAN, WINERIES AND BREWERIES

| Winery                        | Location    | Cellar Door/<br>Shopfront | Café /<br>Restaurant | Functions/<br>Events | Accomm. |
|-------------------------------|-------------|---------------------------|----------------------|----------------------|---------|
| Little Creatues<br>Brewery    | Geelong     |                           | ✓                    | ✓                    |         |
| White Rabbit Brewery          | Geelong     |                           | ✓                    | ✓                    |         |
| Provenance Wines              | Fyansford   | ✓                         | ✓                    | ✓                    |         |
| Mt Duneed Estate              | Waurm Ponds | ✓                         | ✓                    | ✓                    |         |
| St Regis Vineyard &<br>Winery | Waurm Ponds | ✓                         | ✓                    |                      |         |
| Waybourne Winery              | Waurm Ponds | ✓                         |                      |                      |         |
| Prince Albert<br>Vineyard     | Waurm Ponds | ✓                         |                      |                      |         |

## BUSINESS AND CONFERENCE MARKET

There has been significant investment into the Business and conference market, including the redevelopment of the Novotel for business and conference events, and the expansion of the GMHBA Stadium. The GMHBA Stadium has been expanded and now has increased seating capacity. The stadium is under new Trust management who have a directive to increase unitisation of the stadium both from an events and conference perspective.

## EVENTS AND FESTIVALS

The Cadel Evans Great Ocean Road Race, beginning in Geelong and ending in Torquay, is a key driver of visitation for the region.

There are a number of signature arts and culture events in Geelong Urban, including Geelong After Dark and Mountain to Mouth (M~M).



Source: Mountain to Mouth, Dean Walters, 2018.

## TRANSPORT

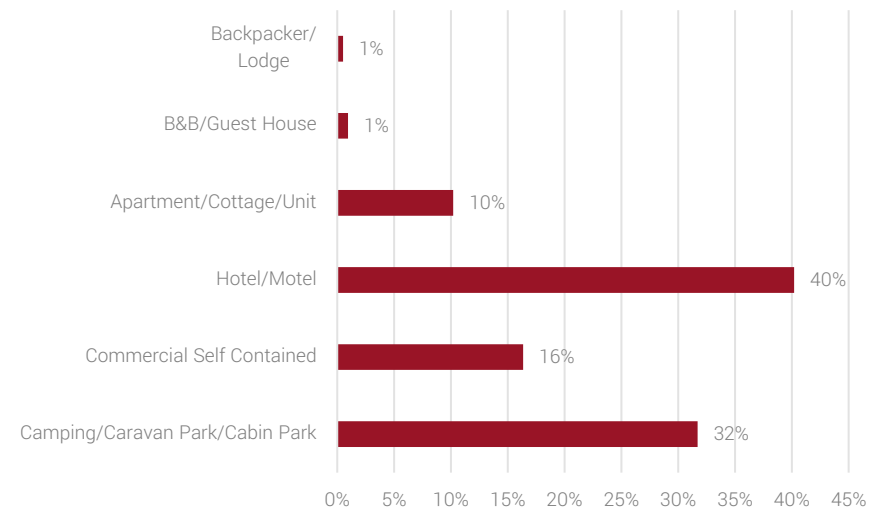
Port Phillip Ferry Services have recently announced a ferry service between Geelong and Melbourne, which will begin in 2019 and will provide alternative and luxury travel options for tourists and residents alike.

## ACCOMMODATION

Geelong holds the majority of the luxury and high-end accommodation in the region. Geelong Urban has only 4 accommodation establishments offering more than 50 rooms, a clear gap in supply for a destination competing in the conferences and exhibitions market. There is also a gap in backpacker accommodation, accounting for only 1% of total rooms in Geelong Urban.

Please note, Airbnb products are not taken into consideration in this assessment due to the sporadic nature of the products relating to seasonality.

FIGURE 26 ROOMS BY ACCOMMODATION TYPE – GEELONG URBAN



Source: Urban Enterprise, 2018.

## 7.4. OPPORTUNITIES FOR GEELONG URBAN

Tier 1 priority project opportunities for Geelong Urban have been identified as:

- Geelong Convention and Exhibition Centre;
- Waterfront Geelong – Safe Harbour Precinct;
- Fast rail to Geelong;
- Cruise ship infrastructure;
- Osborne Park Precinct redevelopment;
- Geelong Cultural Precinct redevelopment;
- GMHBA/Kardinia Park Redevelopment;
- Development of Eastern Beach spa complex;
- Skyrig Adventure Park;
- 4-5 star large branded hotel accommodation; and
- Contemporary experiential accommodation.

Tier 2 project opportunities for Geelong Urban have been identified as:

- Gateways and signage improvements;
- Reimagine the Geelong Port Foreshore;
- Road cycling maps and app development;
- Long-stay self-contained serviced apartments; and
- Quality budget accommodation e.g. 'flashpacker' accommodation.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



Source: Geelong After Dark, 2017.

## 8. QUEENSLIFF AND POINT LONSDALE

### 8.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates the Queenscliff and Point Lonsdale subregion attracted a total of 630,158 visitors in 2018, including 222,149 daytrip visitors (77%) and 408,010 overnight visitors (65%).

The holiday home market is important in Queenscliff and Geelong, with 40% of visitors staying in holiday homes. Therefore, it will be important to market experiential products such as food, wine, events and festivals to this market, and broaden their use of their holiday homes outside of peak summer season through the development of an off-peak events calendar.

### 8.2. KEY FINDINGS

**Queenscliff and Point Lonsdale includes one of the oldest and intact historic tourism townships in Victoria, however there is a lack of new contemporary product and infrastructure to meet visitor expectations.**

**The Borough of Queenscliffe's tourism initiatives including the Fort Queenscliff Masterplan and the Lighthouse Reserves Masterplan will go some way to providing new and interesting product and accommodation to drive visitation.**

**Queenscliff is also the home of the Sorrento Queenscliff Ferry and there have been ongoing enhancements to the Ferry infrastructure and harbour precinct. A key focus for Queenscliff and Point Lonsdale will be increasing the number of ferry visitors stopping over in Queenscliff, with an aim to converting their stay to an overnight trip.**

**Further development and promotion of emerging luxury accommodation products is necessary.**

**There have been a number of improvements to the dining offer, including 360Q and Queenscliff Brewhouse, bringing more contemporary dining product into the region. There is a need to ensure consistency in service and quality.**

### 8.3. PRODUCT PROFILE

#### HISTORY AND HERITAGE

The village of Queenscliff has a charming historic destination appeal, and its heritage architecture and character is supported by a number of key heritage attractions, including:

- Fort Queenscliff Museum;
- Queenscliff Historical Museum;
- Queenscliff Maritime Museum.

The village also has an extensive number of heritage listed buildings that create an aesthetic backdrop for tourism. The former historic hotels of Queenscliff were once iconic tourism accommodation, however many of these have been repurposed into non-tourism uses such as residential apartments.

#### FOOD AND WINE

There have been a number of recent investments into the dining scene in Queenscliff and Point Lonsdale, including 360Q, Q-Train and Queenscliff Brewhouse and adjoining accommodation. Further promotion of these venues, as well as consistency in service and quality, are necessary to increase visitation to these establishments and the subregion.

360Q is a two-storey dining venue located on Queenscliff Harbour, taking in 360-degree views of Port Phillip Bay, the Bass Strait and the Mornington Peninsula.

## TRANSPORT

The Queenscliff-Sorrento Ferry provides a key link between The Bellarine Peninsula and the Mornington Peninsula and is a popular mode of transport for visitors to Victoria. However, many visitors bypass Queenscliff and Point Lonsdale

A key focus for Queenscliff and Point Lonsdale will be increasing the number of ferry visitors stopping over in Queenscliff, with an aim to converting their stay to an overnight trip.

## NATURE-BASED

Queenscliff and Point Lonsdale set on Port Phillip Bay and Bass Strait is a strong water-based destination providing for a range of water sports and boating enthusiasts. Point Lonsdale has excellent ocean beaches.

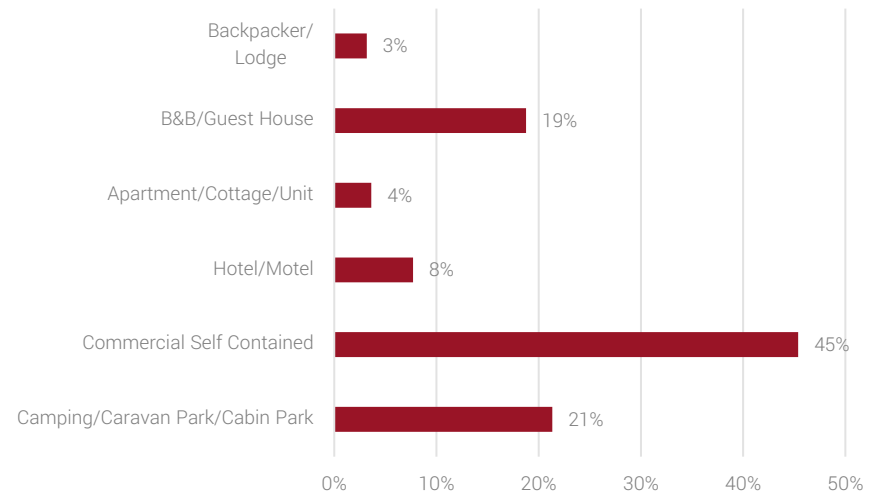
## ACCOMMODATION

The accommodation profile in Queenscliff and Point Lonsdale is dominated by commercial self-contained accommodation (45%), camping/caravan park/cabin park accommodation (21%) and B&B/Guesthouse accommodation (19%). There are also 1,487 holiday homes in the subregion.

Luxury accommodation is an emerging product area for Queenscliff and Point Lonsdale. Recent developments include Lon Retreat and Spa, a luxury accommodation offering with seven private suites and a complementary well-being offer, including access to the Mineral Pool and an Artisan Breakfast Hamper. The Nest is another example of a luxury accommodation offering, with bed and breakfast accommodation 'pods' and private spas for each pod.

Luxury accommodation in Queenscliff and Point Lonsdale needs to be further marketed and promoted. High-quality food and wine experiences need to be further developed to complement these experiences.

**FIGURE 27** ROOMS BY ACCOMMODATION TYPE – QUEENSCLIFF AND POINT LONSDALE



Source: Urban Enterprise, 2018.

#### **8.4. OPPORTUNITIES FOR QUEENSLIFF AND POINT LONSDALE**

Tier 1 priority project opportunities for Queenscliff and Point Lonsdale have been identified as:

- Borough of Queenscliffe investment into Tracks and Trails;
- Borough of Queenscliffe foreshore improvements;
- Hesse Street revitalisation;
- Development of Fort Queenscliff;
- Ferry terminal upgrade;
- Bellarine Railway Masterplan; and
- Events/Culture

Tier 2 project opportunities for Queenscliff and Point Lonsdale have been identified as:

- Community hub redevelopment (Historical museum, VIC and library consolidation);
- Destination Queenscliff;
- Improvements to dining experiences in Queenscliff; and
- Point Lonsdale Lighthouse Reserve;
- Improvement to Queenscliffe Maritime Museum.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 9. BELLARINE SOUTH

### 9.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Bellarine South subregion visitation was 924,424, capturing 16% of total visitation to Greater Geelong and The Bellarine region. 62% of total visitors to the subregion were overnight visitors to the region and only 38% were on a daytrip.

### 9.2. KEY FINDINGS

**The Bellarine South includes the well-developed destinations of Barwon Heads and Ocean Grove.**

**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 offer to visitors is a key opportunity, including the development of nature-based accommodation.**

### 9.3. PRODUCT PROFILE

#### NATURE-BASED

Ocean Grove and Barwon Heads are set on either side of the Barwon River, where the river mouth meets the sea. The excellent ocean beaches set on the Bass Strait are a key product strength and driver of visitation, particularly in peak season. There are a range of water sports and activities on both the river and along the coastline, and a number of boating facilities.

Lake Connewarre is a key natural asset in the region, with surrounding wetlands and parklands. The activation of Lake Connewarre provides a significant opportunity to develop further nature-based tourism attractions for the region in off-peak season.

#### THEME PARKS

Adventure Park, located in Wallington, is Victoria's largest theme park, and includes both theme-park and water-park rides and attractions. Adventure Park receives 240,000 visitors annually, marketing only to the domestic market. Operating only six months of the year, Adventure Park operation is currently limited as a seasonal attraction.

The Park recently has recently developed further rides, with a view for future development accommodation, day spa venues, a conference centre, or other tourism product, provided a Masterplan is submitted.

#### GOLF

Barwon Heads on The Bellarine Peninsula has two golf courses which are ranked within the Golf Digest's Australia's top 100 golf courses: Barwon Heads Golf Club, ranked 25th in Australia, and the 13th Beach Golf Links, with the 'Beach' course ranked 28th in Australia. Both golf clubs provide high quality complementary accommodation in the golf course.

The ISPS Handa Vic Open is a significant event held at 13th Beach Golf Links. It is a family-friendly, professional golf event which plays host to some of the world's best golfing talent at one of Australia's premier golf facilities.

#### FOOD AND BEVERAGE

There are eight wineries and one cidery in the Bellarine South subregion, based mostly in Wallington and Marcus Hill. Seven of the establishments offer cellar door

experiences, five with dining option and function/events spaces, and four offering accommodation onsite.

Recent investment has occurred with the contemporary Flying Brick Cider Co. opening in Wallington, offering a cellar door and provedore experience, lunch 7 days a week and dinner on Friday and Saturday.

**FIGURE 28** WINERIES IN BELLARINE SOUTH

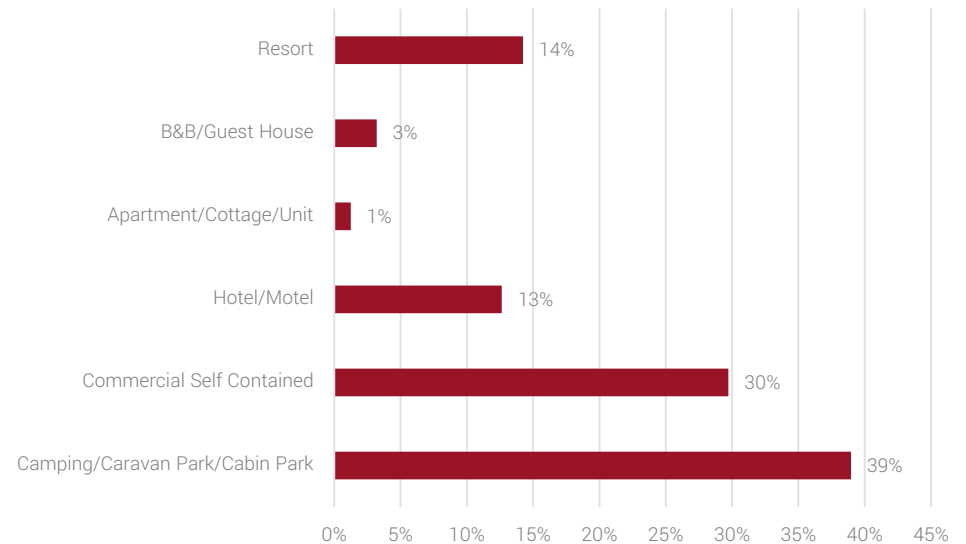
| Winery   | Location    | Cellar Door | Café / Restaurant | Functions / Events | Accomm. |
|--|-------------|-------------|-------------------|--------------------|---------|
| The Minya Vineyard & Winery                        | Connewarre  | ✓           | ✓                 | ✓                  | ✓       |
| Basils Farm  | Swan Bay    | ✓           | ✓                 | ✓                  |         |
| Flying Brick Cider Co. and Yes Said the Seal Wines | Wallington  | ✓           | ✓                 | ✓                  |         |
| McGlashans Wallington Estate                       | Wallington  | ✓           | ✓                 | ✓                  | ✓       |
| Ponda Estate Vineyard                              | Wallington  | ✓           |                   |                    |         |
| Oakdene Vineyards Restaurant                       | Wallington  | ✓           | ✓                 | ✓                  | ✓       |
| Wayawu Estate Winery B&B                           | Wallington  | ✓           |                   |                    | ✓       |
| Marcus Hill Vineyard                               | Marcus Hill |             |                   |                    |         |
| Banks Road Vineyard                                | Marcus Hill | ✓           | ✓                 | ✓                  |         |

## ACCOMMODATION

Accommodation in Bellarine South is dominated by camping/caravan park/cabin park style accommodation (39%) and commercial self-contained accommodation (30%). There are also 1,804 private holiday homes in Bellarine South.

Much of the commercial self-contained accommodation consists of large family style accommodation. Smaller scale self-contained homes and higher-end hotel/motel style accommodation should be considered for the Lifestyle Leader and Metrotech markets.

**FIGURE 29** ROOMS BY SUB-REGION – BELLARINE SOUTH



Source: Urban Enterprise, 2018

#### 9.4. OPPORTUNITIES FOR BELLARINE SOUTH

Tier 1 priority project opportunities for Bellarine South have been identified as:

- Barwon River parklands project
- Lake Connewarre nature-based tourism masterplan;
- Barwon coast masterplans;
- Barwon coast trail;
- Barwon Coast group accommodation project; and
- Off-peak events program.

Tier 2 project opportunities for Bellarine South have been identified as:

- Visitor information services;
- Wayfinding signage;
- Marketing and branding of Barwon Coast;
- Nature-based accommodation (e.g. cabins) at Barwon Estuary;
- Reinvestment into existing commercial accommodation; and
- Development of accommodation at wineries.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 10. BELLARINE NORTH

### 10.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Bellarine North subregion visitation was 841,706, capturing 15% of total visitation to Greater Geelong and The Bellarine region. 67% of total visitors to the subregion were overnight visitors to the region and only 33% were on a daytrip.

The holiday home market makes up 51% of overnight visitors to the Bellarine North subregion.

### 10.2. KEY FINDINGS

**Bellarine North captures a large number of overnight visitors, with the majority of these visitors staying in holiday homes or camping.**

**Bellarine North has recently seen investment in hinterland product such as wineries and dining, including Jack Rabbit Vineyard, The Whiskery and redevelopment of Scotchman's hill winery.**

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

### 10.3. PRODUCT PROFILE

#### NATURE-BASED TOURISM

The Bellarine North has a range of fishing charter and tours servicing the region. However, The Bellarine North does not have many trails or adventure activities. There is considerable potential to improve the offer at both the coastal and rural destinations and capitalise on their natural beauty, as well as improved interpretation and other visitor facilities.

#### HISTORY AND HERITAGE

The National Trust of Australia manages the Portarlington Mill, a heritage listed building now used as an exhibition and social functions venue, located 300 metres from the beach. The building is one of the few remaining and preserved Victorian flour mills, made of heavy timber posts and natural stone.

#### GOLF

The Bellarine North area contains two high quality and popular golf clubs: The Portarlington Golf Club and Curlewis Golf Club. The Curlewis Golf Club has recently undergone significant redevelopment and has reopened an \$8 million improved golf course, new mini golf, driving range and licensed hospitality venue. The Curlewis Golf Club also hosts weddings and functions and is currently in the process of developing onsite accommodation.

#### FOOD AND BEVERAGE

The Bellarine North is increasingly becoming known for its fresh local produce and aquaculture. The Portarlington Mussel Festival is a significant event that attracts a large number of visitors to Portarlington annually. Mussels, wine and bay cruise tours are run sporadically by Port Phillip Ferries in the summer time. There is opportunity to further expand this service by providing more regular tours and by introducing packages with other wineries and provedore experiences.

The Bellarine North subregion has 13 wineries providing a quality experience to visitors to the region, and with the majority (10) having cellar doors available. A growing number (7) of the wineries in Bellarine North have onsite dining, 7 have function/event capabilities, however only 2 of the wineries provide onsite accommodation.

Recent investments into the winery and distillery experience include the redevelopment of Scotchman’s Hill Winery, and the recently opened The Whiskery, a new development by Bellarine Distillery

**TABLE 26** WINERIES IN BELLARINE NORTH

| Winery                      | Location      | Cellar Door | Restaurant | Functions / Events | Accomm. |
|-----------------------------|---------------|-------------|------------|--------------------|---------|
| Bellarine Estate Restaurant | Bellarine     | ✓           | ✓          | ✓                  |         |
| Jack Rabbit Vineyard        | Bellarine     | ✓           | ✓          | ✓                  |         |
| Bennetts                    | Bellarine     | ✓           | ✓          | ✓                  |         |
| Terindah Estate             | Bellarine     | ✓           | ✓          | ✓                  | ✓       |
| Hat Rock Vineyard           | Bellarine     |             |            |                    |         |
| Leura Park Estate Vineyard  | Curlewis      | ✓           | ✓          | ✓                  |         |
| Baie Wines                  | Curlewis      |             |            | ✓                  |         |
| Barrgowan Vineyard          | Curlewis      | ✓           |            |                    |         |
| Curlewis Winery             | Curlewis      | ✓           |            |                    | ✓       |
| OneDay Estate               | Curlewis      | ✓           | ✓          | ✓                  |         |
| Mermerus                    | Drysdale      | ✓           |            |                    |         |
| Scotchmans Hill Vineyards   | Drysdale      | ✓           | ✓          | ✓                  |         |
| The Whiskery                | Drysdale      | ✓           | ✓          |                    |         |
| Grassy Point Wines          | Portarlington |             |            |                    |         |

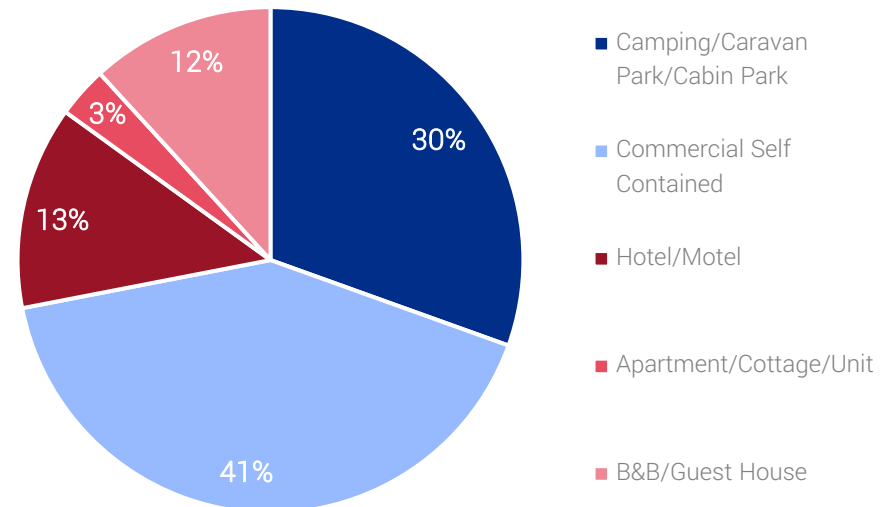
## TRANSPORT

Regular Docklands to Portarlington ferry services are run by Port Phillip Ferry service. The infrastructure built to service Port Phillip Ferry services can also be used to host cruise ship arrivals. This should be a key focus for Bellarine North.

## ACCOMMODATION

41% of commercial rooms in the Bellarine North subregion are self-contained/holiday home accommodation. Only 3% of rooms are in Hotel/Motel accommodation, with the region having a low supply of Hotel/Motel establishments (only six). Caravan/Cabin park accommodation accounts for 30% of room supply in Bellarine North, and there is a high supply of camping sites (965). There are an additional 2,633 visitors staying in private holiday homes.

**FIGURE 30** ROOMS BY ACCOMMODATION TYPE – BELLARINE NORTH



## 10.4. OPPORTUNITIES FOR BELLARINE NORTH

Tier 1 priority project opportunities for Bellarine North have been identified as:

- Portarlington Safe Harbour;
- Underwater Dive Gallery – ‘Sunken Gallery’;
- Aquaculture experiences;
- Development of large resort at Curlewis golf club;
- Development of self-contained apartment/hotel accommodation at Portarlington;
- Development of branded tourist parks; and
- Development of new experiential accommodation.

Tier 2 project opportunities for Bellarine North have been identified as:

- Cycling and walking trails network;
- Accommodation and experience product packages; and
- Development of Accommodation at wineries.

Further detail on these projects can be found in ‘*Part C – Project Profiles*’.

# 11. GOLDEN PLAINS SOUTH

## 11.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Golden Plains South subregion visitation was 121,112. Only 31% of visitors were staying overnight, with the 69% of day trip visitors.

Golden Plains South captures only 2% of total visitation to the Greater Geelong and The Bellarine region.

## 11.2. KEY FINDINGS

**Golden Plains South is largely underdeveloped in tourism, however the subregion hosts strong opportunities to grow the wine sector in the Moorabool Valley and exploring ways to further leverage off emerging tourist villages such as Meredith.**

**The continual investment in Lethbridge airport is a key opportunity for tourism development.**

## 11.3. PRODUCT PROFILE

### NATURE- BASED TOURISM

A key strength of the Golden Plains South subregion is the nature-based tourism offering, including outdoor activities that make use of the landscape and National Park spaces such as bushwalking, mountain bike riding and road cycling, and equestrian activities.

The subregion also has a gold mining history, and gold panning activities can still draw finds in some areas such as near the Steiglitz Historical Park.

### HISTORY AND HERITAGE

The Steiglitz Historic Park, nestled amongst the Brisbane Ranges National Park in the Southern Golden Plains region, is a Parks Victoria-managed 469-hectare site comprising a late 1800s goldmining township. The Steiglitz Court House has a public historical display about the township and goldmining history. Visitors are permitted to pan for gold in dedicated areas. The visitor amenities include picnic and barbecue areas, public toilet and car park, however, the tourism product at the Steiglitz Historic Park is dated and there is much potential to improve the experience offered.

### WINERIES

The key strength of the Golden Plains South subregion is the wine offer. The region has many vineyards, growing good quality, highly ranked vines of all varieties across the area known as the Moorabool Valley.

The majority of wineries have cellar door experiences available to visitors, however very few have café or restaurant facilities or the capacity to cater for functions or events. None of the wineries offer onsite accommodation. Many of the vineyards function on a part-time basis and many offer cellar door experiences by appointment only, with the industry at various stages of maturity and involvement in tourism.

Clyde Park Vineyard and Bistro has recently been expanded, with a new building built onsite adjoin to the venue facility and an outdoor theatre being currently constructed. Austin's Wines is undertaking continuous winery development and investment.

**TABLE 27** WINERIES IN GOLDEN PLAINS SOUTH

| Winery                        | Location          | Cellar Door | Café / Restaurant | Functions / Events | Accomm. |
|-------------------------------|-------------------|-------------|-------------------|--------------------|---------|
| Del Rios of Mt Anakie         | Anakie            | ✓           | ✓                 | ✓                  |         |
| Staughton Vale Vineyard       | Anake             | ✓           |                   |                    |         |
| Clyde Park Vineyard & Bistro  | Bannockburn       | ✓           | ✓                 | ✓                  |         |
| Barwon Ridge Wines            | Barrabool         | ✓           |                   |                    |         |
| Lethbridge Wines              | Lethbridge        | ✓           |                   | ✓                  |         |
| Moorabool Ridge Pty Ltd       | Lethbridge        | ✓           | ✓                 |                    |         |
| Eagles Rise Wine              | Russells Bridge   | ✓           |                   |                    |         |
| By Farr and Farr Rising Wines | Bannockburn       |             |                   |                    |         |
| Spence                        | Murgheboluc       | ✓           |                   |                    |         |
| Ceres Bridge Estate           | Stonehaven        |             |                   |                    |         |
| Austin's Wines                | Sutherlands Creek | ✓           |                   |                    |         |
| Rowsley Fault                 | Sutherlands Creek | ✓           |                   |                    |         |
| Provenance Wines              | Sutherlands Creek |             |                   |                    |         |

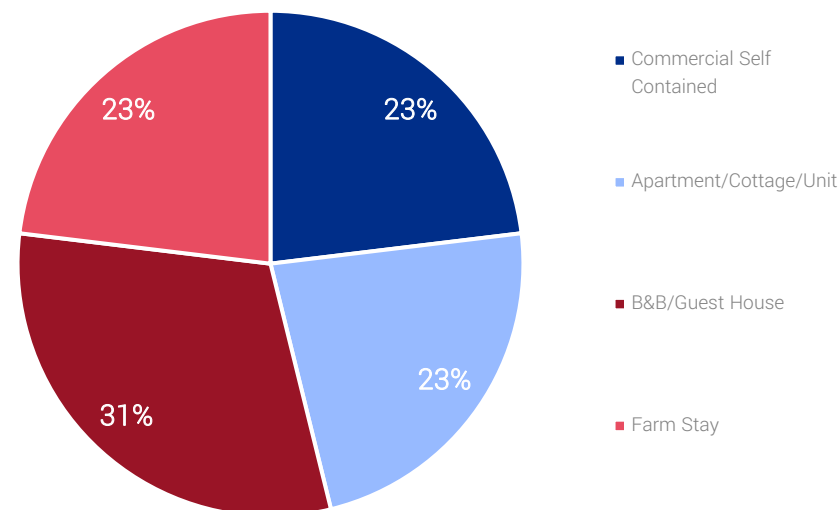
**TRANSPORT**

Lethbridge airport is a private recreational airfield in Golden Plains South. Lethbridge Airport is continually developing and expanding, with a growth in offer for general aviation and flight training facilities.

**ACCOMMODATION**

There is a clear lack of accommodation establishments located in the Southern Golden Plains sub-region. Identified accommodation gaps are listed in Figure 31 below.

**FIGURE 31** ROOMS BY ACCOMMODATION TYPE – GOLDEN PLAINS SOUTH



Source: Urban Enterprise, 2018.

#### 11.4. OPPORTUNITIES FOR GOLDEN PLAINS SOUTH

Tier 1 priority project opportunities for Golden Plains South have been identified as:

- Reticulated Sewerage Investment;
- Lethbridge Airport;
- Telecommunications infrastructure;
- Grow the Moorabool Valley Taste Trail;
- Bannockburn Civic Heart project;
- Promotion of Golden Plains to the VFR market; and

- Living Moorabool Trail.

Tier 2 project opportunities for Golden Plains South have been identified as:

- Provedore and farmgate opportunities; and
- Golden Plains Farmers market.

Further detail on these projects can be found in '*Part C – Project Profiles*'.

## 12. AVALON AND THE YOU YANGS

### 12.1. VISITATION PROFILE

Urban Enterprise's PAVE visitor modelling estimates that in 2018 the Avalon and the You Yangs subregion visitation was 229,519, capturing only 4% of total visitation to the Greater Geelong and The Bellarine region (note that passenger movements through the Avalon Airport are not considered in this visitor modelling). 88% of total visitors to the subregion were daytrip visitors and only 12% were on an overnight trip.

Visitation to Avalon and the You Yangs makes up only 4% of the Greater Geelong and the Bellarine region.

### 12.2. KEY FINDINGS

**Avalon and the You Yangs includes the key features of Avalon Airport and the You Yangs Regional Park. The You Yangs already hosts quality mountain biking which can be further developed through complimentary product such as food and beverage facilities.**

**Avalon Airport provides significant opportunity to grow visitation through growth in domestic and international flights and delivery of new product such as food, beverage, retail and accommodation. There is a clear lack of accommodation in Avalon and the You Yangs.**

### 12.3. PRODUCT PROFILE

#### NATURE BASED TOURISM

The You Yangs Regional Park, managed by Parks Victoria, has a variety of outdoor activities such as walking on any of the 5 trails, mountain bike riding (2 designated areas with over 50 kilometres of trails catering for all abilities), rock climbing and abseiling, scenic drives and viewpoints, birdwatching, horse riding (3 trails) and picnics.

The Brisbane Ranges National Park, also managed by Parks Victoria, has a variety of walking trails, and diverse range of native flora to study. The Staughton Vale Cliff Face Climbing Area is popular for both climbing and abseiling and provides excellent eastern-looking viewpoints for visitors. Picnic grounds and secluded walk-in camping grounds are located in the Park.

#### COMMERCIAL AIRPORT

Avalon Airport is the key commercial airports in Greater Geelong and The Bellarine region. Avalon Airport has recently developed an international terminal and attracted international carrier Air Asia, who provide twice daily flights to Kuala Lumpur.

This is a significant opportunity for tourism in Greater Geelong and The Bellarine Peninsula, and requires complementary investment, which could include commercial developments e.g. food and beverage, retail and accommodation alongside the international airport.

#### EVENTS AND FESTIVALS

Avalon Airport hosts the biennial Australian International Airshow, a key event in regional Victoria attracting a large number of visitors. The annual Lara Food and Wine

Festival is held every March in the Avalon and the You Yangs, subregion, as well as regular small-scale mountain biking events

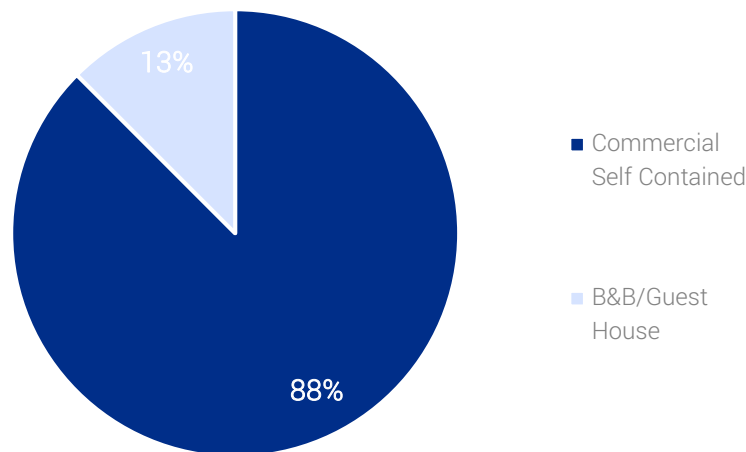
### THEME PARKS

Fairy Park, with its displays of various fairy-tale characters and settings offers a unique attraction for the area. Catering to the family market with young children, the venue includes a theme park, playground and picnic area with barbecue facilities. The venue also caters for school group visits and private functions. Food and beverage facilities and a gift shop are available on weekends and during public and school holidays.

#### 12.3.1. ACCOMMODATION

There is a clear lack of accommodation establishments located in the Avalon & the You Yangs sub-region, with only 16 commercial rooms. These are mainly commercial self-contained accommodation establishments (14), with only 2 B&B guesthouse rooms. Identified accommodation gaps are listed below in Figure 32.

**FIGURE 32** ROOMS BY ACCOMMODATION TYPE – AVALON AND THE YOU YANGS



### 12.4. OPPORTUNITIES FOR AVALON AND THE YOU YANGS

Tier 1 priority project opportunities for Avalon and the You Yangs have been identified as:

- Avalon Airport rail link;
- Implementation of Avalon Airport Masterplan; and
- Development of accommodation at Avalon Airport.

Tier 2 project opportunities for Avalon and the You Yangs have been identified as:

- Development of visitor services and amenity at You Yangs Regional Park;
- Development of hospitality product near You Yangs Regional Park;
- Development of accommodation in Anakie; and
- Development of Nature-based and group accommodation for You Yangs are.

Further detail on these projects can be found in '*Part C – Project Profiles*'.



# PART C

## PROJECT PROFILES

# 13. PRIORITISATION OF PROJECTS

## 13.1. INTRODUCTION

This section provides an overview of the priority projects identified for the Greater Geelong and The Bellarine Region. These projects are identified as they will facilitate growth in the tourism industry.

Table 28 outlines the prioritisation criteria applied to all projects identified throughout the course of the study.

Projects are categorised as:

- Infrastructure and enabling projects;
- Experiential product development;
- Accommodation.

A preliminary economic impact analysis has been undertaken for the projects where possible. This analysis draws on previous studies and construction cost estimates using comparable projects. As this is a high-level analysis, modelling ongoing impacts has only been undertaken for accommodation projects where there is available data on the potential revenue and jobs that may be generated.

Projects have been identified as either tier 1 priority projects or tier 2 projects. Tier 1 projects are those that best align with prioritisation criteria in Table 28 and are of greater regional significance than Tier 2 projects.

**TABLE 28** PRIORITISATION CRITERIA

| Criteria                          | Description   |
|-----------------------------------|---|
| Match to Target Markets Need      | Projects that have will support target markets for Greater Geelong and The Bellarine, specifically the lifestyle leader segments: Food and wine lifestyles, inspired by nature and creative opinion leaders and traditional family life segments score well under these criteria. |
| Promotes Length of Stay and Yield | Projects that create a new product or experience or provide additional capacity for the region score well under these criteria.   |
| Strengthens the Brand Attributes  | Projects that demonstrate strong links with the brand attributes of Greater Geelong and The Bellarine will score well. These attributes include food and wine, water based/nature based and for Urban Geelong arts and culture.   |
| Economic Benefit                  | Projects that are likely to deliver a large economic boost to the regional economy will score well under this criterion. Projects that are large scale or provide a significant boost in regional capacity score well.  |
| Game Changer Projects             | Projects that create a new product and experience which is innovative and captures new visitor markets score well under these criteria.   |
| Good Value/ Cost Benefit          | This criterion assesses whether the project is likely to be good value for money. In most instances the projects have not undergone a cost benefit analysis, however there are small projects in the list that are likely to contribute greatly to the tourism experience.        |

## 13.2. INFRASTRUCTURE AND ENABLING PROJECTS

| DESCRIPTION  | SUB REGION    | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT  | PROJECT STATUS AND NEXT STEPS   |
|--|---------------|--|-----------------|---|--|---|
| <b>TIER 1 PRIORITY PROJECTS</b>  |               |  |                 |   |  |   |
| <b>GEELONG CONVENTION &amp; EXHIBITION CENTRE</b>  |               |  |                 |   |  |   |
| A Convention and Exhibition Centre, including a conference venue with the capacity for up to 1,000 people, 3,000 m2 of exhibition space, banqueting facilities, meeting rooms, a business centre and retail outlets developed alongside. | Urban Geelong | Geelong has a large business and MICE market; therefore the development of the Convention and Exhibition Centre would be a necessary development, and would complement the Melbourne Convention and Exhibition Centre. | Public/Private  | \$30m committed through Geelong City Deal.  | <p>+\$350m during construction<br/>+\$50m p/a</p> <p>600 jobs during peak construction</p> <p>270 ongoing jobs (direct and indirect)</p> | The business plan has been completed and the Convention Centre site has been identified as the Deakin University waterfront campus car park.  |
| <b>FAST RAIL TO GEELONG</b>  |               |  |                 |   |  |   |
| Feasibility study to examine fast rail infrastructure upgrades, costs and train requirements.  | Urban Geelong | There is potential to more than halve the travel time to Melbourne. This will strengthen Geelong's appeal as a place for business with strong links to Melbourne.  | Public          | \$50m State Government funding commitment to investigate a high –speed rail link between Geelong and Melbourne. |  | <p>\$50 million State Government funding commitment to investigate a high –speed rail link between Geelong and Melbourne.</p> <p>A State Government commitment of \$500 million is required to separate the Geelong-Melbourne regional line from the metropolitan rail service by creating express lanes at Wyndham Vale.</p> |

| DESCRIPTION   | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS |
|---|--------------------|---|-----------------|----------------|-----------------|-------------------------------|
| <b>IMPLEMENTATION OF AVALON AIRPORT MASTERPLAN</b>  |                    |   |                 |                |                 |                               |
| <p>A Master Plan for Avalon Airport was completed and was endorsed by the Department of Defence in September 2015. The Master Plan is effective for 20 years. The major components of the Master Plan include:</p> <ul style="list-style-type: none"> <li>• The expansion of the existing domestic terminal to accommodate international operations without a Major Development Plan (up to 10,000 square metres);</li> <li>• The provision to construct a new international terminal;</li> <li>• The establishment of airfreight terminals;</li> <li>• The provision to lengthen the existing runway to up to 4,000 square metres;</li> <li>• The development of accommodation hotels;</li> <li>• The development of the site to accommodate retail, commercial and industrial;</li> <li>• The continuation of the Australian International Airshow until at least 2025;</li> <li>• The reservation of land and provision for the establishment of a rail link;</li> <li>• The provision for recreational and sporting facilities;</li> <li>• The continued curfew free status of the aerodrome; and</li> <li>• The City of Greater Geelong will remain the Planning Authority.</li> </ul> | Avalon & You Yangs | <p>The approval of the Master Plan ensures the long term future operation of the airport and provides a strategic basis to leverage tourism opportunity development.</p> <p>Implementation of the masterplan is imperative to the growth of the airport and operations.</p> | Public/Private  |                |                 |                               |

| DESCRIPTION  | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|--|--------------------|---|-----------------|----------------|-----------------|---|
| <b>AVALON AIRPORT RAIL LINK</b>  |                    |   |                 |                |                 |   |
| The Victorian Government is planning for the development of the Avalon Airport Rail Link to support the newly opened international terminal. The rail link will connect Avalon Airport with the existing Melbourne - Geelong rail line. V/line trains would operate between Southern Cross Station and Avalon Airport and between Geelong and Avalon via the existing Melbourne – Geelong rail line. | Avalon & You Yangs | The connection of Avalon Airport to rail transport will be a significant infrastructure development that will promote increased visitation to Greater Geelong and the Bellarine, particularly for international visitors.   | Public/Private  |                |                 | <p>The Minister for Planning approved a planning scheme amendment in June 2015 to ensure a reservation of land is maintained for the rail link</p> <p>Current proposed alignment of the railway station would involve creating an “Avalon Airport” station between Little River and Lara with a terminal for passengers to check in and drop off their bags. Passengers would then transfer to a different form of transport – possibly an autonomous bus – for a four-kilometre, four-minute journey to the departure lounge at the airport.</p> |
| <b>GEELONG PORT PHILLIP FERRY SERVICE</b>  |                    |   |                 |                |                 |   |
| Support implementation of the Port Phillip Ferry Service between Geelong and Docklands.  | Urban Geelong      | Providing diversity in the transport modes to urban Geelong will enable the region to capture a greater number of visitors who may prefer to travel via boat.   | Public/Private  |                |                 | Service to begin in 2019.   |
| <b>GEELONG CRUISE SHIP INFRASTRUCTURE (CUNNINGHAM PIER)</b>  |                    |   |                 |                |                 |   |
| This project calls for investment in moorings for cruise ships at the Geelong waterfront, which would establish Geelong as a competitive cruise ship destination. Improvements and an arrival centre at Cunningham Pier are part of the proposed investment  | Urban Geelong      | Investment in moorings will allow for easy access and potential increase to the number of cruise ships in Geelong. There is also long-term potential for Geelong to be host and service a cruise ship on a permanent basis. | Public/Private  |                |                 | Business case complete  |

| DESCRIPTION   | SUB REGION    | RATIONALE   | INVESTMENT TYPE                              | ESTIMATED COST  | ECONOMIC IMPACT   | PROJECT STATUS AND NEXT STEPS  |
|---|---------------|---|--|---|---|--|
| <b>WATERFRONT GEELONG – SAFE HARBOUR PRECINCT</b>   |               |   |  |   |   |  |
| <p>Key aspects of the Concept Plan include:</p> <ul style="list-style-type: none"> <li>a new 6 m wide wave attenuator (public accessible curved floating pier) which will protect the marina from rough water coming from the north-west</li> <li>the development of a modern floating-berth marina with greatly increased mooring capacity</li> <li>a new RGYC clubhouse with improved public access (the ground floor being open to the general public)</li> <li>integration of the Victorian Sailing School and its activities with RGYC, providing increased capacity to deliver important programs for the community</li> <li>a 'Sailor's Walk' public pedestrian passageway through the existing RGYC site</li> <li>Public realm and leisure area improvements</li> <li>a series of retail spaces and a public viewing platform, and</li> </ul> <p>the possibility of an interactive Maritime Cultural and Education Centre</p> | Urban Geelong | The new facilities will provide capacity to cater for a large increase in yachts and watercraft visiting and berthing safely in Geelong. It will improve public access to the water, support major events and enhance other recreation, economic and tourism opportunities. | Public/Private                               | <p>\$7.6m State Government funding</p> <p>\$5.5m Federal Government funding secured</p> <p>\$3m COGG</p> <p>\$3m Royal Geelong Yacht Club</p> | <p>\$17.6m immediate economic benefits in Stage 1</p> <p>42 FTE jobs p/a during construction</p> <p>21 FTE jobs p/a ongoing</p> | <ul style="list-style-type: none"> <li>Currently in detailed design phase</li> <li>\$50,000, Business Case to investigate the economic development impacts, costing, planning and required infrastructure of the project and determine an implementation strategy. (The City of Greater Geelong and the former Geelong Otway Tourism contributed \$15,000 and the Royal Geelong Yacht Club also contributed \$15,000 towards the Business Case.)</li> </ul> <p>The City of Greater Geelong has committed \$3 million.</p> <p>Royal Geelong Yacht Club has committed \$3 million.</p> |
| <b>GEELONG OSBORNE PARK PRECINCT</b>  |               |   |  |   |   |  |
| Osborne Park precinct is in North Geelong and includes the historic Osborne House and the Stables, sports reserves and open spaces and the Vietnam Veterans war memorial. A planning study is underway to reimagine the use of the precinct.  | Urban Geelong | This will provide opportunities for investment in unique and contemporary tourism products in this area.  | Public/Private (dependant on land ownership) |   |   | Master planning process is currently underway. Next stage is community consultation on draft masterplan.   |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|---|-----------------|--|
| <b>BOUROUGH OF QUEENSCLIFFE INVESTMENT INTO TRACKS AND TRAILS</b>   |                                |   |                 |   |                 |  |
| Investment into walking and cycling trails, and Improvement of infrastructure and connectivity.   | Queenscliff and Point Lonsdale |   | Public          |   |                 | Potential for around 30 km of trail to be developed. The analysis and feasibility study has been put out to tender.  |
| <b>BOROUGH OF QUEENSCLIFFE FORESHORE IMPROVEMENTS</b>   |                                |   |                 |   |                 |  |
| Improve infrastructure and streetscape along the foreshore to improve visitor experiences.  | Queenscliff and Point Lonsdale |   | Public          |   |                 | The foreshore plan is currently underway, with implementation to occur after completion.   |
| <b>QUEENSCLIFF HESSE STREET REVITALISATION PROJECT</b>  |                                |   |                 |   |                 |  |
| A Revitalisation Project for Hesse Street, Queenscliff, which will include beautification of the streetscape.   | Queenscliff and Point Lonsdale | Revitalisation would have a positive impact on the local tourism industry, improving the image of the town and making it a more competitive holiday destination. It could also have the potential to encourage reinvestment in local businesses, both on Hesse Street but in surrounding areas. | Public          | \$50,000 funding allocation for development of plan       |                 | Funding has been allocated in the local government budget to develop the revitalisation plan. The next step is for council to seek funding for the implementation of the plan. |
| <b>FERRY TERMINAL UPGRADE</b>   |                                |   |                 |   |                 |  |
| The new terminal, fully-funded by the Government in partnership with Searoad Ferries, will include modern facilities, opportunities for retail such as cafes and tourism ventures, bathrooms, disabled access and improved car parking areas. | Queenscliff and Point Lonsdale | Revitalisation of the ferry terminal means passengers will board a ferry via an aerobridge, and not the vehicle ramp, delivering a much more accessible and passenger friendly service  | Public/Private  | Total Cost \$10m. Funding received via Geelong City Deal. |                 |  |
| <b>EVENTS/CULTURE</b>   |                                |   |                 |   |                 |  |
| Development of an events and culture strategy for the Queenscliff and Point Lonsdale.   | Queenscliff and Point Lonsdale | There has been limited development in events and culture in Queenscliff and Point Lonsdale, hence the creation of an Events and Culture Strategy will provide clear direction for development in these areas.   | Public          |   |                 | Application for funding to develop strategy.   |

| DESCRIPTION  | SUB REGION          | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT   | PROJECT STATUS AND NEXT STEPS  |
|--|---------------------|---|-----------------|---|---|--|
| <b>GOLDEN PLAINS RETICULATED SEWERAGE INVESTMENT</b>   |                     |   |                 |   |   |  |
| Investment in reticulated sewerage is necessary for all of Golden Plains. Currently Bannockburn is the only town in Golden Plains South with reticulated sewerage.   | Golden Plains South | Advocacy for reticulated sewerage investment is needed, as it is key to business development and tourism development.   | Public          |   |   | Continued advocacy for federal and/or state government funding.                            |
| <b>LETHBRIDGE AIRPORT</b>  |                     |   |                 |   |   |  |
| There is opportunity to expand existing operations and products at Lethbridge, including potentially to develop a flight school and accommodation for visitors and other users of the airport such as hobby pilots. Future plans for the airport include sealing taxi-ways, motel/accommodation and a terminal building. | Golden Plains South | Lethbridge airport are looking at potential for a flight school- particularly aimed at Asian market<br>Further promotion of the airport to attract more regional carriers, and tourism industry operators such as scenic flight and skydiving businesses, could further expand the tourism potential of the airport.<br><br>It will also diversify the Golden Plains Shire's predominantly agricultural economy and complement Ballarat and Avalon airports | Private         | \$5m for master plan & construction of a terminal building<br><br>\$1.5m to develop a second runway.<br><br>\$39m estimated construction cost | 250 jobs during construction<br><br>37 ongoing jobs post construction, (28 direct). | Development of farmstay accommodation at Moranghurk winery across from Lethbridge airport. |
| <b>TELECOMMUNICATIONS INFRASTRUCTURE AND ENABLING PRODUCT</b>  |                     |   |                 |   |   |  |
| Both phone and internet coverage across the Shire are patchy.  | Golden Plains South | Better coverage provides greater opportunities (and safety) at the Meredith and Golden Plains Music Festivals as well as remote wineries, farm gates and visitors   | Public          |   |   | Continued Advocacy is required.  |
| <b>BARWON RIVER PARKLANDS PROJECT</b>  |                     |   |                 |   |   |  |
| The project aims to have a chain of open parkland from the ring road in Geelong to the sea in Barwon Heads.  | Bellarine South     | The key strategic focuses of expanding a connected network of open space, tracks and trails is planning for the next wave of regional space expansion and enhancing the visitor experience. This will provide open space linking Geelong and the Bellarine  | Public          |   |   | Finalise masterplans and concepts and seek funding for implementation.                     |

| DESCRIPTION  | SUB REGION      | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST   | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|--|-----------------|--|-----------------|--|-----------------|--|
| <b>BARWON COAST PRECINCT MASTERPLANS</b>   |                 |  |                 |  |                 |  |
| The Coastal Marine Management Plan was developed to manage the 6 precincts that make up the Barwon Coast between Ocean Grove and Barwon Heads. The Plan outlines a number of key focus areas for the precinct masterplans, including planning for enhancement of walking and cycling trails, improved access to beaches, improved marketing of caravan parks and enhanced online booking system, environmental management and infrastructure upgrades. | Bellarine South | Precinct masterplans are required to manage the stretch of crown land managed and protected by Barwon Coast, as well as to enhance infrastructure in and around the tourist parks.           | Public/Private  |  |                 | Barwon Coast are currently undertaking the Master planning process.  |
| <b>BARWON COAST TRAIL</b>  |                 |  |                 |  |                 |  |
| Development of an iconic walking trail between Bremlea and Point Lonsdale along the foreshore.   | Bellarine South | There is a lack of integration between Bellarine South and Point Lonsdale/Queenscliff. A trail along the foreshore would increase visitor dispersal across the region.                       | Public          |  |                 | Feasibility Study required for trail links   |
| <b>PORTARLINGTON SAFE HARBOUR (INCL. PRECINCT DEVELOPMENT)</b>   |                 |  |                 |  |                 |  |
| Stage Two of the project will include waterside commercial infrastructure and improve road and pedestrian access to the harbour.   | Bellarine North | The upgrade of the harbour will increase tourism opportunities through leisure and recreational boating, and position Portarlington as the home of sustainable aquaculture and fine produce. | Public          | State Government funding commitment of \$7.9m is needed to complete Stage Two. |                 | Next step is construction of stage 2, which includes the development of waterside commercial infrastructure and improvements to road and pedestrian access to the harbour. |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST           | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|--------------------------|-----------------|--|
| <b>TIER 2 PROJECTS</b>  |                                |   |                 |                          |                 |  |
| <b>GATEWAYS AND SIGNAGE IMPROVEMENT</b>   |                                |   |                 |                          |                 |  |
| An improvement to the road network gateways into Geelong, including directional and destination signage, would improve the visitor experience and legibility upon entering the region.  | Urban Geelong                  | At present the entrance points to Urban Geelong lack a feeling of arriving to a destination and any local character and identity. The alignment of the Geelong brand with the gateway experience upon entering Geelong would greatly improve the perception of Urban Geelong as a place to visit. | Public          |                          |                 |  |
| <b>REIMAGINING THE PORTS FORESHORE</b>  |                                |   |                 |                          |                 |  |
| A planning study to re-imagine the foreshore of the ports precinct in Geelong could provide opportunities to improve the public space and pathway connectivity across the region.   | Urban Geelong                  | The area has the potential to evolve through repurposing and/or revitalising the foreshore public space, making use of the views and access to the water.   |                 |                          |                 | Undertake an activation plan for Geelong's waterfront exploring ways to create experiences for visitors and greater levels of activation both summer and winter. |
| <b>ROAD CYCLING MAPS AND APP DEVELOPMENT</b>  |                                |   |                 |                          |                 |  |
| The development of road cycling maps and smart phone /tablet applications for visitors would promote and provide visitor information on the existing cycling routes across the region, encouraging visitation at multiple destinations across the region. | Urban Geelong                  | This type of information for the road cycling market is currently inconsistent across various platforms, and is not promoting destination visitation.   |                 |                          |                 |  |
| <b>COMMUNITY HUB REDEVELOPMENT</b>  |                                |   |                 |                          |                 |  |
| Redevelopment of Queenscliff's historical museum, library, Visitor Information Centre on current site.  | Queenscliff and Point Lonsdale |   | Public          | \$2.5m funding received. |                 | Preliminary plan for the museum to be demolished and reconstructed as a community hub. Next step is to attract funding.  |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>BOAT RAMP REDEVELOPMENT</b>  |                                |   |                 |                |                 |   |
| Redevelopment of the Queenscliff boat ramp.   | Queenscliff and Point Lonsdale |   | Public/Private  |                |                 |   |
| <b>CYCLING AND WALKING TRAILS NETWORK</b>   |                                |   |                 |                |                 |   |
| Improvement to the cycling and walking trails network across the Bellarine North subregion, including links to Urban Geelong and other Bellarine Peninsula destinations, Improvements required include making the roads safer for on road cyclists (such as providing road shoulders) and creating new linking pathways across the network of trails. | Bellarine North                | Investment into cycling and walking trails would encourage visitor markets, such as road cyclists and coastal walkers, to visit the Bellarine North destinations. |                 |                |                 | Develop a cycle tourism masterplan for the Geelong and Bellarine Region.          |
| <b>DEVELOPMENT OF VISITOR SERVICES AND AMENITY AT YOU YANGS NATIONAL PARK</b>   |                                |   |                 |                |                 |   |
| Development and upgrading of picnic area amenities, such as tables, barbecues, toilets, and water taps  | Avalon and the You Yangs       | This would significantly improve the experience of the destination, as well as broaden the appeal of the destination to a broader visitor market.                 |                 |                |                 |   |
| <b>VISITOR INFORMATION SERVICES</b>   |                                |   |                 |                |                 |   |
| Potential to develop a visitor information centre in Barwon Heads or Ocean Grove.   | Bellarine South                |   |                 |                |                 |   |
| <b>WAYFINDING SIGNAGE</b>   |                                |   |                 |                |                 |   |
| Enhancing and increasing the number of wayfinding signs.  | Bellarine South                | It is currently difficult for visitors to navigate from the Ferry through to the Great Ocean Road. Improvement to wayfinding signage is needed.                   |                 |                |                 | Audit the current wayfinding signage and provide recommendations on improvements. |

### 13.3. EXPERIENTIAL PRODUCT DEVELOPMENT

| DESCRIPTION  | SUB REGION    | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST  | ECONOMIC IMPACT  | PROJECT STATUS AND NEXT STEPS   |
|--|---------------|--|-----------------|---|--|---|
| <b>TIER 1 PRIORITY PROJECTS</b>  |               |  |                 |   |  |   |
| <b>GEELONG CULTURAL PRECINCT (BOUTIQUE HOTEL)</b>  |               |  |                 |   |  |   |
| <p><b>Geelong Art Gallery</b><br/>Revitalisation and expansion of Geelong Art Gallery.</p>   | Urban Geelong | Geelong Art Gallery is restricted by a lack of adequate space, limiting display and constraining storage of the magnificent collection owned by the people of Geelong. Expanded facilities will embed large scale, popular and drawcard exhibitions, providing significant tourism and economic outcomes for the region. | Public/Private  | \$70m State Government and Federal Government funding required to redevelop Geelong Gallery.  | Expanded gallery will attract 200,000+ visitors p/a  | Business case funded, but construction still outstanding. Investment will also be required by CoGG and Geelong Gallery. |
| <p><b>Geelong Performing Arts Centre (GPAC)</b><br/>Works on the Geelong Performing Arts Centre (GPAC) commenced in 2017.</p>                      |               | Refurbishment and expansion of GPAC will increase the number and scale of performances that can be attracted to the centre, and in turn increase visitation.   |                 | \$28m funding still required for Stage 3 GPAC construction.   | Add \$30m to GRP p/a<br><br>700 Victorian jobs during construction<br><br>390 ongoing jobs p/a |   |
| <b>GBHMA/KARDINIA PARK REDEVELOPMENT (HOTEL DEVELOPMENT)</b>   |               |  |                 |   |  |   |
| Redevelopment of Kardinia Park complex, which will add an extra 6000 seats to the stadium, amongst other infrastructure and facility improvements. | Urban Geelong | The increase in number of seats would bring increased economic investment into the area, including new jobs and economic activity.   | Public          | \$102m State Government commitment for 5 <sup>th</sup> /last stage of redevelopment.<br><br>\$3.9m State Government commitment for business case investigating Stage 5 stadium redevelopment. |  | Stage 5 to be completed after 2020 World Cup.   |

| DESCRIPTION   | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|-----------------|---|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF EASTERN BEACH SPA COMPLEX</b>   |                 |   |                 |                |                 |  |
| Development of a high-quality public baths and integrated commercial mineral spa complex located on the Geelong waterfront, making use of the natural mineral spring at Eastern Beach.  | Urban Geelong   | Geelong is one of the few areas in Australia that has natural mineral water springs. There is potential to leverage economic benefit from this natural resource.  | Public          |                |                 | Continue to promote investment opportunity.  |
| <b>SKYRIG ADVENTURE PARK</b>  |                 |   |                 |                |                 |  |
| Development of an aerial ropes facility along the Geelong foreshore.  | Urban Geelong   |   | Private         |                |                 | Currently looking at freehold land for a site. Following consultation with the State Government, it was agreed to suspend any further development of the Sky Rig proposal until the business case and master plan for the proposed Convention and Exhibition Centre are finalised. |
| <b>UNDERWATER DIVE GALLERY</b>  |                 |   |                 |                |                 |  |
| Development of an underwater gallery attraction in Portarlington, expanding the region's competitiveness as a water sport and diving destination.   | Bellarine North | This project provides potential for a year-round dive experience that will attract international visitors to the region.  | Public          |                |                 | Development of gallery underway, with first statues being erected summer 2018/19.  |
| <b>AQUACULTURE EXPERIENCES</b>  |                 |   |                 |                |                 |  |
| Establish the Bellarine North subregion as a tourism region for aquaculture, by the development of an aquaculture touring route throughout the Bellarine North subregion, and investment for local retail and hospitality businesses related to the local seafood industry. | Bellarine North | Aquaculture is a key agricultural sector in the northern Bellarine and there is significant opportunity to develop a touring route/taste trail, with events such as the Portarlington Mussel Festival already attracting large numbers of visitors. | Private         |                |                 | Work with the State Government to identify policy improvements that encourage sea to plate initiatives.  |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>THE BELLARINE RAILWAY MASTERPLAN</b>   |                                |   |                 |                |                 |   |
| Complete a masterplan and feasibility study for the development of an experience where you disembark a regular train service at Drysdale and connect to heritage rail   | Queenscliff and Point Lonsdale | The Bellarine railway runs between Queenscliff and Portarlington, with 2 daily services.  |                 |                |                 | Undertake a feasibility study and Masterplan for expansion of heritage train services.  |
| <b>DEVELOPMENT OF FORT QUEENSCLIFF</b>  |                                |   |                 |                |                 |   |
| The site upgrade and commercial development of the historic Fort Queenscliff attraction to provide an iconic tourism asset for the region. The site could hold a medium-capacity conference space, dining options, accommodation, a museum about the areas' military history, and other supporting visitor services such as tours, events and educational programs. | Queenscliff and Point Lonsdale | Fort Queenscliff is a unique heritage asset that has the potential to become a new destination for Queenscliff.                 |                 |                |                 | Business case is currently underway.<br>Next step is to obtain funding.<br>Need to continue to promote investment opportunity to private sector.                |
| <b>GROW THE MOORABOOL VALLEY TASTE TRAIL</b>  |                                |   |                 |                |                 |   |
| Development of the Taste Trail through investment in restaurants, cafes, cellar doors and associated infrastructure.  | Golden Plains South            | The taste trail needs continual investment in order to compete with the more well-developed and promoted Bellarine Taste Trail. | Private         |                |                 | Austin's has put in an application to Wine Growth Fund to develop a cellar door and café. Need to continue to promote investment opportunity to private sector. |

| DESCRIPTION   | SUB REGION          | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST   | ECONOMIC IMPACT  | PROJECT STATUS AND NEXT STEPS  |
|---|---------------------|---|-----------------|--|--|--|
| <b>BANNOCKBURN CIVIC HEART PROJECT</b>  |                     |   |                 |  |  |  |
| <p>A visionary project that will create a vibrant community space in the centre of Bannockburn</p> <ul style="list-style-type: none"> <li>• Water play splash pad and adventure play equipment</li> <li>• Upgraded site for the Golden Plains Farmers' Market</li> <li>• BBQ facilities and shade</li> <li>• Public toilets and seating areas</li> <li>• New car park</li> <li>• Active recreation equipment</li> <li>• Garden beds and planter boxes</li> <li>• Relocation of Playgroup building and Scouts shed to a new location onsite</li> <li>• Paved plaza for functions, events and gatherings</li> <li>• Improved lighting, safety and accessibility.</li> </ul> | Golden Plains South | The project is expected to inject an additional \$6 million per annum in retail spending in the Golden Plains Shire and will facilitate the potential expansion of the Golden Plains Farmers' Market. | Public          | <p>\$4.6m total estimated cost.</p> <p>\$2.6m State Government and Federal Government funding secured for Stage 1.</p> | <p>\$6m p/a in retail spending in Golden Plains Shire.</p> | <p>Stage 1 funding secured, need to secure stage 2 funding to re-locate the CFA/SES to a new site and to build a village green for events and the Golden Plains Farmers Market.</p> <p>Currently developing detailed designs, and next stage is construction of stage 1.</p> |
| <b>LIVING MOORABOOL TRAIL</b>   |                     |   |                 |  |  |  |
| Development of a walking trail along the Moorabool river to potentially link with the Barwon river.   | Golden Plains South | The Moorabool River trail will provide an important connection between Golden Plains South and Urban Geelong and will promote visitor dispersal throughout the region.                                | Public          |  |  | Currently in the concept phase, however, need funding for detailed concept plan, masterplan and business case. There is potential for a connection between Meredith and Batesford.   |

| DESCRIPTION   | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------|---|-----------------|----------------|-----------------|--|
| <b>YOU YANGS/SERENDIP MASTERPLAN</b>  |                    |   |                 |                |                 |  |
| Development of a masterplan and business case for the You Yangs Regional Park, Serendip Sanctuary and Trail Connections. Each initiative has site specific and regional outcomes, however all have the same broader aim to enhance broader bushwalking offering for Victoria to grow its reputation as the adventure capital. | Avalon & You Yangs | Each initiative aims to enhance its unique profile and offer as a diverse destination for a range of markets with improved connections to local communities and key attractions/sites.  | Public          |                |                 | Development of a master plan for each initiative and a business case for each initiative.                    |
| <b>OFF-PEAK EVENTS PROGRAM FOR BELLARINE SOUTH</b>  |                    |   |                 |                |                 |  |
| Development of a series of events throughout Autumn-Spring in order to attract off-peak visitation.   | Bellarine South    | Accommodation establishments are at capacity in Barwon Heads and Ocean Grove in summer but visitation is quite low in winter, therefore several significant events should be developed to attract visitation to the region in the off peak season and to develop a winter brand.  | Public/Private  |                |                 |  |
| <b>LAKE CONNEWARRE NATURE-BASED TOURISM MASTERPLAN</b>  |                    |   |                 |                |                 |  |
| Development of a masterplan which focuses on the activation of Lake Connewarre as a key nature-based tourism experience. Development of complementary activities and experiences such as water-based activities (canoeing, kayaking etc.) and enhancement of infrastructure (e.g. picnic grounds).                            | Bellarine South    | Lake Connewarre State Game Reserve already provides for a number of activities such as picnicking, fishing and duck hunting. It is also home to the Connewarre Wetland Centre, an important eco-tourism site providing wetland education. A masterplan is required to enhance existing facilities and experiences in order to increase visitation to Lake Connewarre. | Public/Private  |                |                 | Relevant peak body to obtain funding for a concept planning study, prior to the development of a masterplan. |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|---|--------------------------------|---|-----------------|----------------|-----------------|--|
| <b>TIER 2 PRIORITY PROJECTS</b>   |                                |   |                 |                |                 |  |
| <b>IMPROVEMENTS TO DINING EXPERIENCES IN QUEENSCLIFF</b>  |                                |   |                 |                |                 |  |
| Queenscliff village would be an ideal destination for quality dining experiences on the Bellarine Peninsula, providing a modern dining experience with a scenic heritage back drop.   | Queenscliff and Point Lonsdale | Queenscliff is not currently providing a high quality nor variety of dining experiences for its largely Melbourne-based weekender and functions markets demand.<br>This would improve the reputation of Queenscliff as a high-quality seaside holiday village appealing to the regions discerning target markets who are interested in quality food and wine experiences whilst on holiday. | Private         | N/A            |                 |  |
| <b>DESTINATION QUEENSCLIFF</b>  |                                |   |                 |                |                 |  |
| <p>Destination Queenscliff will ensure that the precinct made up of Shortland's Bluff, Fort Queenscliff and Ocean View is recognised as one of the most magnificent coastal locations in Victoria. The key elements of the project include:</p> <ul style="list-style-type: none"> <li>• Construction of a new kiosk/café and public toilets;</li> <li>• Including 6 new cabins;</li> <li>• Cultural landscaping and paths in the Queenscliff Lighthouse Reserve;</li> <li>• Ship viewing platforms;</li> <li>• Upgrades to the car park and the southern end of Hesse Street;</li> <li>• Improvement of public open space areas; and</li> <li>• Lighting of the historic Fort Queenscliff wall.</li> </ul> | Queenscliff and Point Lonsdale | A key aspect of increasing visitation and visitor expenditure in the region is through the enhancement and protection of the significant military, maritime, indigenous and settlement heritage and the stunning beauty of the coastal vista, and rehabilitating vegetation in the area to create a focal point for residents and visitors alike.   | Public          |                |                 | <p>Funding has been received for landscaping and trail improvements at the Queenscliff Lighthouse Reserve.</p> <p>Funding required for further projects.</p> |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS   |
|---|--------------------------------|---|-----------------|----------------|-----------------|---|
| <b>IMPROVEMENT TO THE QUEENSCLIFF MARITIME MUSEUM</b>   |                                |   |                 |                |                 |   |
| Improvements to the experience could include interactive displays and technology-guided interpretive tours. An improvement to the attractions offering would also complement proposed destination development at the Fort Queenscliff site. | Queenscliff and Point Lonsdale | The Queenscliff Maritime Museum has the potential to be a leading tourism attraction for the region, particularly with strong visitor market using the Queenscliff – Sorrento ferry from the nearby ferry terminal. |                 |                |                 | Plans underway for Queenscliff Music Festival to co-home with Museum.<br>Undertake a business plan for the museum to determine how it can be improved from a governance and physical perspective. |
| <b>POINT LONSDALE LIGHTHOUSE RESERVE</b>  |                                |   |                 |                |                 |   |
| Landscape development of Point Lonsdale Lighthouse Reserve was the preferred revitalisation option from community, as opposed to any commercial development.  | Queenscliff and Point Lonsdale | The Point Lonsdale Lighthouse precinct is recognised by Heritage Victoria as being of architectural, historical and archaeological significance to the State of Victoria.   | Public          |                |                 | Landscape design to be completed early, with landscaping works to be completed by August.   |
| <b>PROVIDORE AND FARM GATE OPPORTUNITIES</b>  |                                |   |                 |                |                 |   |
| There exists the opportunity to develop Farm gate and Provideore retail and hospitality experiences.  | Golden Plains South            | There is a great supply of fresh local produce being grown in the Golden Plains South region (and nearby regions), and this needs to be showcased.  | Private         |                |                 | Work with producers to identify investment potential in farm gate activity.   |
| <b>GOLDEN PLAINS FARMERS MARKET</b>   |                                |   |                 |                |                 |   |
| Continue to grow the Golden Plains Farmers Market as a key tourism attraction and support/incubator for smaller farm gate and fresh produce makers and growers.   | Golden Plains South            |   |                 |                |                 | Develop a business plan for the sustained growth of the Golden Plains Farmers Market.   |
| <b>PROMOTION OF GOLDEN PLAINS TO THE VFR MARKET</b>   |                                |   |                 |                |                 |   |
| Encouraging local residents to become brand ambassadors.  | Golden Plains South            | It is imperative to golden plains to residents, as the VFR market is the biggest visitor market.  | Public          |                |                 |   |

| DESCRIPTION  | SUB REGION             | RATIONALE  | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT STATUS AND NEXT STEPS  |
|--|------------------------|--|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF HOSPITALITY PRODUCT NEAR YOU YANGS REGIONAL PARK</b>   |                        |  |                 |                |                 |  |
| The development of hospitality product such as cafes, Provedore and unique restaurant ventures would improve the destination image and experience of the You Yangs Regional Park.            | Avalon & the You Yangs | The You Yangs receives many mtn bike visitors, however there is very little local expenditure generated from these visitors.   |                 |                |                 | Work with local industry and Parks Victoria to establish an onsite food experience at the You Yangs. |
| <b>ACCOMMODATION AND EXPERIENCE PRODUCT PACKAGES</b>   |                        |  |                 |                |                 |  |
| Development of tourism packages that provide all-inclusive deals such as an accommodation and lunch/dinner at a winery (e.g. Jack Rabbit) package  | Bellarine North        | There is opportunity to strengthen Bellarine North as a destination both combining accommodation with experiences to grow the destination as a short break market.                       |                 |                |                 | Work with industry and identify businesses which would provide experiences to a package offer.       |
| <b>MARKETING AND BRANDING OF BARWON COAST</b>  |                        |  |                 |                |                 |  |
| Development and promotion of Bellarine South as a destination, with a key focus on the promotion of Barwon Heads and Ocean Grove and the significant tourism offerings of each coastal town. | Bellarine South        | Barwon Coast does not have the same brand recognition as Surf Coast, yet the offer is very similar. There is a need to explore the way in which the Barwon Coast is marketed and branded |                 |                |                 | Undertake a marketing plan and brand development exercise for Barwon Coast.                          |

## 13.4. ACCOMMODATION

| DESCRIPTION  | SUB REGION         | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS   |
|--|--------------------|---|-----------------|----------------|-----------------|--|
| <b>TIER 1 PRIORITY PROJECTS</b>  |                    |   |                 |                |                 |  |
| <b>DEVELOPMENT OF ACCOMMODATION AT AVALON AIRPORT</b>  |                    |   |                 |                |                 |  |
| There is opportunity for development of a 4-star branded hotel at Avalon Airport with an approximate capacity of 120 rooms. This development is prospective for the next 5 years and would be dependent on other commercial/retail developments in the area.   | Avalon & You Yangs | There are currently 1.1 M passengers annually with Air Asia flights running twice daily, however need 1.6 M annual visitors to support a hotel. | Public/Private  |                |                 | Continue to promote investment opportunity.  |
| <b>LARGE RESORT – AT CURLEWIS</b>  |                    |   |                 |                |                 |  |
| The development of a large resort with coastal views in proximity to Portarlington. This facility would be largely self-contained with a high level of facility provision including recreation facilities, food and beverage and also events facilities.   | Bellarine North    |   | Private         |                |                 |  |
| <b>DEVELOPMENT OF SELF-CONTAINED APARTMENT /HOTEL ACCOMMODATION AT PORTARLINGTON</b>   |                    |   |                 |                |                 |  |
| Development of self-contained and/or hotel accommodation to address the low supply of high-quality accommodation in the Bellarine North subregion.<br>Proposed development of a 68 room hotel, with 2 pools, spa, restaurant, 19 self-contained villas, function room, 20 private treatment rooms and geo-thermal access | Bellarine North    | Potential for new developments at the existing coastal reserves and coastal tourist parks. Improve the utilisation of waterfront spaces         | Private         |                |                 |  |
| <b>DEVELOPMENT OF BRANDED TOURIST PARKS</b>  |                    |   |                 |                |                 |  |
| Development of a branded tourist park in Bellarine North, of suitable scale and sensitivity to the local amenity.  | Bellarine North    |   | Private         |                |                 | Potential for development at Portarlington foreshore reserve. There are significant opportunities for fixed accommodation. |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS  |
|--|-----------------|---|-----------------|----------------|-----------------|---|
| <b>OCEAN GROVE CHALET</b>  |                 |   |                 |                |                 |   |
| 20 luxury suites to be developed as part of a high end accommodation project in Ocean Grove.   | Bellarine South | Meet demand for higher end visitors to the region   | Private         |                |                 |   |
| <b>NATURE-BASED RESORT</b>   |                 |   |                 |                |                 |   |
| Development of a nature-based resort (Loch Bellarine Resort) fronting onto a small lake in Wallington.<br>Loch Bellarine will feature a vast array of facilities to create a holistic resort experience and cater for a number of functions. | Bellarine South | There is significant opportunity to capitalise on the natural assets and rural landscape of the Bellarine Peninsula in the form of resort style accommodation.  | Private         |                |                 | Loch Bellarine Resort Feasibility Study and Concept Plans completed.  |
| <b>BARWON COAST GROUP ACCOMMODATION PROJECT</b>  |                 |   |                 |                |                 |   |
| Development of group accommodation to cater for eco-tourism and educational groups who want to experience the southern Bellarine region and its natural assets.  | Bellarine South | There is currently no large group style accommodation in the Bellarine South region and there are a number of eco-tourism groups visiting the region, therefore it is a necessary to diversify the accommodation stock. | Private         |                |                 | Develop a feasibility study and seek external funding support for the project.                              |
| <b>CONTEMPORARY EXPERIENTIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |   |
| Development of a unique and contemporary style of experiential accommodation in Geelong, for example, an art series hotel or a unique accommodation development in a repurposed building.  | Urban Geelong   | Modern, high-quality experiential accommodation is necessary to support the emerging arts and cultural scene in Urban Geelong.  | Private         |                |                 | Identify potential sites that may be explored for re-use.   |
| <b>4-5 STAR LARGE BRANDED HOTEL ACCOMMODATION</b>  |                 |   |                 |                |                 |   |
| Development of a branded four to five-star hotel in Urban Geelong, to complement a convention and exhibition centre and to address the regions need for greater supply of high-quality accommodation.  | Urban Geelong   |   | Private         |                |                 | Potential for accommodation at Geelong Exhibition and Convention Centre.<br>Potential expansion at Novotel. |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS   |
|--|-----------------|---|-----------------|----------------|-----------------|--|
| <b>DEVELOPMENT OF NEW EXPERIENTIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |  |
| Development of experiential accommodation such as glamping in Bellarine North along the foreshore or in areas with coastal views.  | Bellarine North | There are emerging visitor markets (Lifestyle Leaders, and high-flyers who are visiting for weddings and golf) that want to experience the natural assets of the coast in a modern luxurious accommodation setting. | Private         |                |                 |  |
| <b>WELLNESS CENTRE WITH ACCOMMODATION</b>  |                 |   |                 |                |                 |  |
| There is opportunity to develop a spa and wellness centre in Bellarine North.  | Bellarine North | Development will leverage from the emerging wellness product on the Bellarine Peninsula, in line with the range of fresh produce, farmgate developments and natural assets.   | Private         |                |                 |  |
| <b>TIER 2 PRIORITY PROJECTS</b>  |                 |   |                 |                |                 |  |
| <b>LONG STAY SELF-CONTAINED SERVICED APARTMENTS (APPROX. 150 ROOMS)</b>  |                 |   |                 |                |                 |  |
| There is a demand for long stay self-contained serviced apartments in Geelong which would serve the use of the hospital/business/public sector/education markets, as well as increase room capacity in Urban Geelong to support a growing events industry. | Urban Geelong   | The development of serviced apartments with approximately 150 room capacity would address this gap in accommodation product.  |                 |                |                 | Has come online: Deakin University student accommodation complex |
| <b>QUALITY BUDGET ACCOMMODATION, E.G. "FLASHPACKER" ACCOMMODATION</b>  |                 |   |                 |                |                 |  |
| Opportunity to invest in quality budget accommodation in this subregion, potentially a "flashpacker" accommodation establishment offering a quality budget accommodation experience, to fill the backpacker accommodation product gap.                     | Urban Geelong   | As there is a general lack of backpacker type accommodation across the region, therefore an establishment in Geelong would service travel of the budget/backpacker market to the entire region.                     |                 |                |                 | Some movement but still opportunities                            |

| DESCRIPTION  | SUB REGION      | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS                      |
|--|-----------------|---|-----------------|----------------|-----------------|---|
| <b>NATURE BASED ACCOMMODATION (E.G. CABINS) AT BARWON ESTUARY</b>  |                 |   |                 |                |                 |   |
| There are a number of nature-based assets throughout Bellarine South that can provide a potential setting for nature-based accommodation. This includes locations along the Barwon River, Barwon Estuary or overlooking the coast.   | Bellarine South |   |                 |                |                 |   |
| <b>REINVESTMENT INTO EXISTING COMMERCIAL ACCOMMODATION</b>   |                 |   |                 |                |                 |   |
| There are a number of caravan parks and commercial establishments located throughout Barwon Heads and Ocean Grove. Many of these are in excellent locations, however many of the establishments are in need of reinvestment. Additional self-contained cabin development and improved facilities within caravan parks will meet market need. | Bellarine South |   |                 |                |                 | Underway                                |
| <b>DEVELOPMENT OF ACCOMMODATION AT WINERIES</b>  |                 |   |                 |                |                 |   |
| The Bellarine South subregion (and Bellarine Peninsula in general) has the potential to increase its wineries product offering by providing onsite accommodation, which would meet the demand of its high-income earning target markets interested in quality food and wine experiences and luxury (4 or 5 star) accommodation.              | Bellarine South | Development of experiential accommodation product linked to the wineries in the Bellarine South subregion would make the winery stays and functions market more competitive and encourage visitors to extend their stay on the Bellarine Peninsula. |                 |                |                 | Have been ecopod and glamping proposals |
| <b>DEVELOPMENT OF ACCOMMODATION AT WINERIES</b>  |                 |   |                 |                |                 |   |
| The Bellarine North subregion has the potential to increase its wineries product offering by offering onsite accommodation, which would meet the demand of its high-income earning target markets interested in quality food and wine experiences and luxury (4 or 5 star) accommodation.  | Bellarine North | Development of experiential accommodation product linked to the wineries in the Bellarine North subregion would make the winery and functions market more competitive and encourage visitors to extend their stay on the Bellarine Peninsula.       |                 |                |                 | Have been ecopod and glamping proposals |

| DESCRIPTION   | SUB REGION                     | RATIONALE   | INVESTMENT TYPE | ESTIMATED COST | ECONOMIC IMPACT | PROJECT NEXT STEPS |
|---|--------------------------------|---|-----------------|----------------|-----------------|--------------------|
| <b>DEVELOPMENT OF ACCOMMODATION IN ANAKIE</b>   |                                |   |                 |                |                 |                    |
| There exists an opportunity to develop small-scale accommodation in Anakie, either in the form of farm stay, bed and breakfast, cabins, or onsite winery accommodation.   | Avalon & the You Yangs         | This would particularly meet the demand of visitors to the Brisbane Ranges National Park and the You Yangs Regional Park, encourage longer stays in the region and experiences of more local tourism products on offer. |                 |                |                 |                    |
| <b>DEVELOPMENT OF NATURE-BASED AND GROUP ACCOMMODATION FOR YOU YANGS AREA</b>   |                                |   |                 |                |                 |                    |
| Development of self-contained group accommodation in proximity to the You Yangs Regional Park would cater to users of the Park such as mountain bike riding and hiking groups, providing an alternative to camping. | Avalon & the You Yangs         | The development could encourage longer stays in the area and potentially lead to further local business opportunities.  |                 |                |                 |                    |
| <b>DIVERSIFICATION AND INVESTMENT INTO PRIVATE AND COUNCIL MANAGED ACCOMMODATION</b>  |                                |   |                 |                |                 |                    |
| Development of a range of accommodation types, and promotion of investment in viable accommodation types to the private sector.   | Queenscliff and Point Lonsdale | Queenscliff has a large proportion of holiday homes and historic hotels however needs a greater diversity in accommodation stock.   |                 |                |                 |                    |

# APPENDICES

## APPENDIX A PAVE MODELLING

The number of visitors to the Greater Geelong and the Bellarine region has been calculated using Urban Enterprise's PAVE model. The model uses a number of algorithms which draw on local level accommodation data (number of establishments and guest rooms), ABS Survey of Tourist Accommodation data (occupancy rates) and National Visitor Survey Data (visitor proportions).

PAVE modelling has been used for the preparation of visitation figures for this report to present a more holistic representation of visitation to the region. Relying on Tourism Research Australia's National Visitor Survey (NVS) and International Visitor Survey (IVS) data in isolation does not provide an accurate account of total visitation to the Greater Geelong and the Bellarine region for the following reasons:

- IVS and NVS data does not capture visitation for persons 14 years and under;
- Sampling methods for the NVS do not effectively capture holiday home visitors, due to the biased nature of holiday home ownership. This results in underestimating the number of visitors staying in holiday homes and for Greater Geelong and the Bellarine, which has many non-permanent rate payers, underestimates total overnight visitation to the region;
- The IVS does not provide estimates of international day-trippers to Greater Geelong and the Bellarine.

In response to the underestimation of visitation to Greater Geelong and the Bellarine, Urban Enterprise provides new estimates on visitation to the region, accounting wholly for the holiday home sector, visitors aged under 14 and international visitation.

In addition, NVS/IVS data is not accurate below the LGA level for Greater Geelong and the Bellarine due to the low sample size. Urban Enterprises PAVE model has been developed to provide visitor estimates for small areas.

Urban Enterprise has applied this model to a number of areas in the past including Greater Shepparton, Strathbogie Shire, Murrindindi Shire, Mansfield Shire, Mitchell Shire, Surf Coast Shire, Mornington Peninsula Shire, Indigo Shire and City of Frankston. This work has been used for understanding visitation at the small area level for those areas and also for economic impact modelling.

## APPENDIX B ECONOMIC TERMS AND DEFINITIONS

Output data represents the gross revenue generated by businesses/organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

Employment data represents the number of people employed by businesses / organisations in each of the industry sectors in a defined region. Employment data presented in this report is destination of work data. That is, no inference is made as to where people in a defined region reside. This employment represents total numbers of employees without any conversions to full-time equivalence. Retail jobs for instance represent typical employment profiles for that sector, i.e. some full time, some part time and some casual.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in an increase in the wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy.

Impacts used in this assessment include the following terms:

- Direct effects – Direct output or value of development or construction activity.
- Indirect effects:
  - Supply-Chain effects – The increased output generated by servicing industry sectors in response to the direct change in output and demand; and
  - Consumption effects – As output increases, so too does employment and wages and salaries paid to local employees. Part of this additional income to households is used for consumption in the local economy which leads to further increases in demand and output region.



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