



Committee for  
Geelong

LEADERS FOR GEELONG

Regional Marketing Group

# Marketing Research Report



**May 2008**

Recommendations to the Committee for Geelong

This document was created by the Committee for Geelong 2006-2008 Leaders for Geelong 'Marketing Research Project Group' in co-operation with a diverse range of stakeholders.

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# EXECUTIVE SUMMARY

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The Leaders for Geelong Marketing Research Project Group Report has been undertaken as part of the Leaders for Geelong Program 2006-2008.

The G21 Regional Marketing Strategy was considered during this research project. This strategy proposed a number of key priority areas that could be the focus for future actions and resources in the coming years and where it could be expected to see significant areas of focus or improvement in marketing outcomes for the region.

In the References section there is a list of reports, policies and strategies on marketing during the past decade to show that there has been no shortage of advice to G21 about how to address the outcomes. One of the most useful documents was the G21 Regional Marketing Strategy that was completed in April 2006.

This group's findings are largely based on observations and discussions with the Geelong regional community and businesses, along with major Government funding bodies, the Traffic Accident Commission (TAC) and combined with robust desktop research.

We have found that there are compelling reasons for all members of the Geelong regional community to work together in a co-ordinated fashion to market the region effectively. These include:

- External perceptions of Geelong are largely negative
- There is little evidence of alignment between agencies tasked with the economic development of Geelong
- There is confused branding of the region that conflicts rather than supports the diversity of the area
- There is poor marketing of the Geelong Region
- Numerous private and public sector networks exist for their own benefit and stymie economic development of the region
- Geelong needs to better understand it's labour market and needs – essential information to help support regional development

Recommendations made as a result of these findings include:

- Creating an independent and transparent marketing / branding organisation or system
- Progressing the G21 Marketing Strategy as a matter of urgency
- Undertaking a regional skills audit / gap analysis
- Using the gap analysis to target and attract new investments
- Promote the Geelong brand strongly
- Coordinate and align Geelong marketing and economic development strategies with Local, State and Federal Government initiatives

# PROJECT OVERVIEW

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## Project Participant Details

Name	Organisation	Role
Amanda Bavin	Barwon Health	Director Communications & Marketing
Julie Graham	Karingal	General Manager Corporate Services
Kerryn Hynam	Victoria Police	Acting Inspector Region 2 (West)
Timothy McDonald	City of Greater Geelong	Customer Service Coordinator
Joan McGovern	Shell Refining Australia	Australian Manufacturing Communications Manager
Peter Temple	Wharf Shed Complex	General Manager

## Acknowledgements

The Leaders for Geelong Marketing Research Project Group wishes to thank the following organisations who have contributed to our findings:

- Business and Professional Women's Network Geelong
- City of Greater Geelong
- Geelong Manufacturing Council
- Geelong Otway Tourism
- Golden Plains Shire Economic Development
- G21
- Invest Victoria
- Regional Development Victoria
- Salesforce
- Transport Accident Commission
- Westfield

## Parameters / Limitations

There are some definitive parameters/limitations to our findings:

- The Geelong Region is defined as the City of Greater Geelong and other areas that form part of the G21 footprint
- Geelong is at the economic heart of the G21 region which we believe suffers most from a lack of a positive image, that in turn fails to inspire people to “live, work and invest” in Geelong
- Our focus of the report is on marketing Geelong as a place to “live, work and invest” in rather than to “visit Geelong”. The tourism market has been the focus of Geelong Otway Tourism for some time. We believe our contribution will have the most impact by focusing on the long-term attractiveness of the region to current and future residents and labour market participants
- We recognise that these findings are based on knowledge and opinions of group participants, desk top research and interviews conducted with key business people. We also acknowledge that as residents of the region, our perceptions and opinions may be biased
- The report does not seek to denigrate or insult the commitment and hard work of the many individuals and organisations who have contributed to the marketing of the Geelong Region through the marketing, event (GME), industry and tourism sectors
- There has been much hard work done to establish Geelong as a strong regional centre but there is still much more that can be done in a coordinated and effective fashion.

# PROJECT DETAILS

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A G21 Regional Marketing Strategy has been developed with some action items that have not been progressed since June 2006. The Regional Marketing Strategy provides a unique opportunity and challenge to the region to ensure that there is co-ordination and cooperation of effort. The research group of the inaugural 2006 Leaders for Geelong Program has been established to undertake a project with a view to developing a report that provides an insight into why people choose – or not – to live, work and/or invest in Geelong. It also provides a series of recommendations for how the Committee for Geelong and key stakeholders can entice people to live, work and / or invest in the Geelong Region in the long term. The intent / aspiration is that this will feed into future marketing / promotional strategies, including the implementation of the G21 Regional Marketing Strategy.

## **Project outline / scope**

Research was undertaken across the following three main areas to gain an understanding of why people would choose to live, work and / or invest in Geelong and how marketing strategies can be developed to attract people to the region:

- Desk top research to understand existing successful regional marketing models of other second cities (i.e. Newcastle, Wollongong)
- The movement of the Traffic Accident Commission (TAC) head office to Geelong in 2009, provided our group with a great opportunity to gain an insight into why or why not people would relocate to Geelong. Facilitated focus groups were held with personnel from TAC to identify drivers and barriers to people making Geelong their home. This assisted us to understand what kind of region we are perceived to be versus what kind of region we need to market ourselves as
- Identification and interviews and / or surveys of key business people who have made the choice to move their business to the Geelong Region

## **Project methodology**

The project methodology included:

- Investigating steps already taken in creating regional brands / positioning statements / marketing models. Learning from others rather than re-inventing the wheel. Desktop research conducted by syndicate group members
- Focus groups were held with personnel from TAC, including a group of staff who have decided to move to Geelong, as well as another group of staff who have decided not to move to Geelong. These focus groups allowed us to explore in detail the key motivators and barriers that impact on people when making their decision to move or not

## **Project aims and intended outcomes**

The aims and outcomes of the project were to:

- Understand the drivers for attracting people to live, work, and / or invest in the Geelong region
- Understand what makes a successful Regional Marketing Strategy based on researching what other second cities have done and what has worked for them
- Hand over the project to Committee for Geelong, G21 and key stakeholders at completion

# RESEARCH DETAILS

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## Desktop research

### Second cities

Detailed desk top research has been conducted on 'second cities' to identify their marketing / branding strategies.

Australian cities researched included Bendigo, Ballarat, Wollongong and Fremantle. International cities included Dundee in Scotland, Bilbao in Spain and Oxford in England.

Refer to **Appendix 1** for detailed research.

The key findings of this research are encapsulated in the following table:

#### International 'second cities'

	<b>What can Geelong learn from these cities and their branding? What is transferable?</b>
<b>Dundee, Scotland</b>	Geelong faces a similar predicament to Dundee in that we are traditionally a manufacturing based city that needs to establish a clear direction for the future. The statement "Changing for the future" has a real sense of optimism and confidence in the future and reflects how the Dundee Partnership approach is enabling people to regenerate their community from the inside out. They are basing their future on being a regional education and employment centre where less traditional industries are driving growth such as biomedical, software development and retail. It's great to see that Dundee has sought social inclusion for their less fortunate areas and has included them within their Community Plan and is focusing on Neighbourhood Renewal - this has obvious correlations with Geelong's northern suburbs.
<b>Bilbao, Spain</b>	Geelong faces similar pressures to Bilbao due to an ailing industrial base with the potential to reinvigorate the city around the waterfront and invest in an international tourism attraction that would bring a cultural focus to the city and establish it as a cultural centre. However, this direction seems to give precedence to tourists / visitors rather than the community and puts appearances before everything else so there is a potential to lose our sense of community if we go down this track. Our population is not decreasing in the same way as Bilbao, rather it is attracting people to move here due to relatively lower real estate prices and great lifestyle opportunities.

Australian 'second cities'

	<b>What can Geelong learn from these cities and their branding? What is transferable?</b>
<b>Ballarat, Australia</b>	Ballarat seems very focused on becoming an alternative to people living and working in Melbourne. This is a strategy that we can utilise in Geelong considering our close geographic proximity to Melbourne. The focus is not just on lifestyle in Ballarat, but on employment opportunities including partnerships developed with the local universities and learning centres to move towards a knowledge-based city. These partnerships and the programs in place to retain local university graduates in the town are relevant to Geelong in maintaining a work force to ensure a strong local economy and to attract investment into the region.
<b>Wollongong, Australia</b>	Geelong is following a similar path to Wollongong with the decline of the previously strong manufacturing sector and the development of science and technology precincts, particularly through Deakin University. Revitalising Geelong may be achieved through attracting and engaging new residents through attractive employment options combined with a better lifestyle. This seems to be a strong strategy in attracting the residents we need to meet the needs of our growing community by attracting specialised industries to invest locally, because we can meet their skills needs. A strategy of attracting younger workers to the region is necessary to balance the growing age of the residents of the region i.e. large population who are no longer in the workforce.
<b>Fremantle, Australia</b>	Fremantle is obviously very clear about what and how it wishes to market its city. It focuses very narrowly on attracting the tourism dollars to town. However, it differs from Geelong in that it seems to cater to a vast array of visitors' needs. Fremantle has diverse natural landscape attractions, a strong and interesting history, thriving arts and cultural industries, a vast array of restaurants and a strong and clear strategy to welcome and meet the needs of all tourists. Geelong does not seem to meet these diverse needs of tourists in such a clear and planned manner. Such a strong single minded focus on tourism would not be suitable for Geelong.
<b>Bendigo, Australia</b>	Bendigo promotes itself similarly to Ballarat, as an alternative to living in Melbourne. However, it also promotes itself as a major regional centre for business and residents in the north and centre of the state. As with Geelong, Bendigo needs a more targeted direction to attract residents who can enhance the lifestyle in the town i.e. young professionals, young families. There is much promotion of the affordable housing in Bendigo which should be a key attractor promoted by Geelong, along with our close proximity to Melbourne.

## Marketing of the Geelong Region

From the desktop research conducted by this group, there does not appear to be a clear brand or positioning statement about the Geelong Region that is readily identifiable and known. This is problematic because there is no clear message on what the Geelong Region offers people who may consider living, working and / or investing in the Geelong Region.

The first step in any marketing exercise is to have a clear understanding of who we are and what we have to offer. If we as a region are unable to articulate it, we severely limit our opportunities for growth. We leave people with no other cues for forming a perception other than through media reports that are quite often negative – apart from the recent football premiership win.

There is a statement “Geelong, Smart Thinking” that is used in City of Greater Geelong literature. However, it is not used consistently across all marketing material. There is reference to Central Geelong as an exciting and convenient place to work, play, relax and have fun. Some other promotional statements that are advertised on websites and billboards include: “More style, more services, more flavour, more choice, more fun”, “Best place to live”, “Waterfront must sea”. Such statements do not adequately define the Geelong Region.

Another description of Geelong from the City of Greater Geelong website said: “Geelong’s lifestyle is hard to beat and includes quality housing, wide-ranging recreational choices, a strong economy, a cosmopolitan, vibrant community and comprehensive health-care services”. We feel that this statement although positive, does not differentiate Geelong from any other region or city and may not necessarily reflect our city accurately. It may be an aspiration rather than a reality.

Geelong does not promote itself well to people who would rely on desktop research to identify why they should live, work and/or invest in Geelong. There is little information on the web compared to other 'second' cities that have been researched.

A major focus of the current City of Greater Geelong website is attracting people to work and invest in the region, specifically featuring the opportunities in biotechnology. Information on this sector is prominent and easily accessible.

Attracting people to the region for affordable and varied housing is also a key focus of the website. However, more needs to be made of the fact that there will soon be a ring road around Geelong that will facilitate options for living in rural and coastal areas and travelling to Melbourne for work, making the region a very attractive, accessible option.

## Transport Accident Commission (TAC) Focus Groups

The group decided to seek information from TAC employees about their perceptions of Geelong. They are a great recent example of a discrete community who have been “forced” to consider the pros and cons of moving to Geelong through the Victorian Government’s decision to relocate their head office to Geelong in January 2009.

The demographics of TAC staff show an organisation that is 65% female, with an average age of 37 with 70% of their personnel living in inner Melbourne, or in the northern and eastern suburbs and the Mornington Peninsula. The composition of the focus groups was representative of these demographics.

Refer to **Appendix 2** for a copy of the questionnaires used as a guide in focus group discussion.

**The focus group conducted in Melbourne on 24 January 2008 with TAC employees who had chosen NOT to move to Geelong found the following:**

### Factors in the decision:

- Kids just commenced high school
- Too far from home and family
- Cost of moving
- Travelling for family contact – commute/travel time for family/aged mother
- \$30,000 not enough to compensate for move
- Lifestyle – inner city ride to work, social contact in city
- Western suburbs – public transport to city – drive to Geelong-safety issue, Avalon hwy clogged, boring 40 minute drive, time – 1 hour train, limited services
- Employment – other than TAC in Geelong (skillset)
- Career – time commitment with one company
- Role uncertainty
- Travel time
- Organisation – invited selected individuals to go, same job in Geelong. I perceived I was not one of the chosen ones, don’t want to become a negative employee
- Positive impetus to move on – not move to Geelong.
- From TAC forced to consider options
- Future opportunities with TAC not defined/guaranteed
- Core values/dignity/respect/culture changed with move arrangements
- Mentoring culture – potential for mentors to be overloaded
- Organisational change – rather move on and move forward; new systems therefore all inexperienced initially; TAC today not what it will be moving to; number of people needed may decrease
- I haven’t even been to Geelong
- Better if more similar to Melbourne - employment opportunities
- Drug dealer/child porn/thug bouncers – news (from St. John ambulance colleagues)

### **Issues: Positive**

- House prices not much different to Melbourne
- Land-horse lifestyle
- Seaside
- Very clean
- Holidayed in Bellbrae – farms, markets, arts
- Smaller/bigger than thought
- Great private schools
- Good band scene

### **Issues: Negative**

- House prices not so cheap – less appreciation
- Tsunami – Geelong gone (global warming)
- Has a Myer
- Not enough recreational facilities for kids
- Tertiary education available or move back to Melbourne
- Drive in, not impressive
- Not thought about Geelong before
- Economic – influenced by Government – if Ford closes house prices will decrease
- Little country town

### **Facilities/services**

- Public transport system lacking
- Access to childcare/public schools (from station to school to work)
- Cinemas – more mainstream
- Holiday town – not good for employment or kids facilities; university limited; recreational; employment limited
- Food i.e. Vic. Market – where go out for breakfast? - lack of restaurants
- Geelong Football Club – services re doctor/plumber/electrician
- Nowhere to go for Friday night drinks
- Bar/clubs/young crowd approx. 22years – singles venues
- Club alternatives i.e. St. Johns branches limited

## **What they say to people when they say they are not moving**

- Can't afford another place
- Travel time
- Singles – what to do
- Others think “the beach” why not move – you must be crazy
- Just moved into a new house (there 1 month) – to move would be a ridiculous decision
- Career choice/age/like living in Melbourne
- Daughter's vision of a penthouse on the beach; feels I'm not going because of her, wants me to go
- Mum encouraging – thinks Geelong is lovely – a quiet country town
- Mum not willing to travel further to visit (Swan Hill)
- 2 girlfriends moving and encouraging
- Job role – restructure/uncertainty of claims model/trimmer structure
- Older staff not wanted re payouts/Long Service Leave (heard from 4 different public sector sources); impression team not wanted to go; selection of a chosen few to progress; value young managers - nepotism, mate driven

**The focus group conducted in Melbourne on 24 January 2008 with TAC employees who have chosen to make the move to Geelong found the following:**

### **Factors/Issues**

- Interim period to mid 2009 and then assessment
- Mornington – similar lifestyle, networks, career opportunities
- Access to services- Doctors/childcare/schools/kindergartens
- Property market – can afford Geelong (not St.Kilda)
- Lifestyle – home/yard/walk on the beach
- Career opportunities within TAC with the move opened up internally
- Single – no ties to Melbourne
- Partner – home/office – will maintain a Melbourne base, child friendly
- Different to Melbourne – Ocean Grove/Clifton springs less shops, restaurants
- May stay with TAC – but move to inner city (not Geelong) – train/ connections in
- Richmond already/same 1 hour travel/downsizing/ husband works in Melbourne/5 adult children
- Live near water and be only 10-15 minutes to work
- Friends moving, already moved

## Impressions

- 1 hour travel OK – good downtime/reading
- Bogan backwater – go past on way to Apollo Bay
- Opposite direction to which I live
- Other job opportunities – big industry closing down
- Work opportunities/networks for partner
- Media – girls raped in mall, may be beaten up by media
- Geelong Addy loves to sensationalise - read other papers for news
- Saturday – centre of town deserted – aware transitioning with increasing population
- Some suburbs less safe than others – equate to any city
- Still bogan-ville – saw a drug deal in the street – happens anywhere
- Melbourne 15 years ago
- Positive perception from working with Geelong residents
- Beautiful homes, lovely areas
- TAC adding employment to the town
- TAC taking employees from local businesses – Centrelink/GMHBA
- In Geelong stick to core business hours i.e. no overtime
- Beachside
- Everybody knows Geelong that I know – yes, we're coming with you
- Holiday home at the Beach – friends will visit on weekends
- Walk the dog
- Nice feeling of community – known to local businesses (called by first name)
- Ocean Grove/Torquay
- Friends/relatives at caravan parks (beach)
- Inner city lifestyle and near the beach

## Facilities/Services

- Good bookshops and music shops
- Bars – nightlife – bars don't cater for late 20's to 40's/less options
- Music venues – alternative music
- Sports clubs
- Clubs – art
- Kardinia Park and football holds no interest – football obsessive town/media beat it up
- Looking forward to community service – volunteering/smaller therefore closer connected and less travel time therefore more time for community involvement
- Already involved in local community where I live therefore continuation – will get involved
- Boost membership of clubs – surf lifesaving
- Beach/Surfcoast/Great Ocean Road/Otways/Eastern beach done so well
- Attractive inner city – gardens/waterfront/painted wooden men (5 minutes from work)

## Family and friend's perceptions

- Supportive, great lifestyle choice
- Kids – get a 5 Bedroom apartment at Torquay
- What are you going to do
- Family ask “are you ever coming back?”
- Not such a big deal
- Husband supportive – knows I love working with the TAC; do what you are happy doing
- Financial incentives are amazing
- Keeping a place here and buying a beach house down there
- Transition to new networks – shed some previous friends

**The focus group conducted in Geelong on 20 February 2008 with TAC employees who have chosen to make the move to Geelong found the following:**

## Factors

- Career – opportunity to move around with career post-TAC
- Partner – would husband be happy to relocate and commute to work
- Friends and family – being further away from friends and family so they or I would need to travel
- Personal service providers – having to find a dentist/doctor again

## **Issues**

- Where to locate to in region – Geelong, Surf Coast or Bellarine Peninsula (do I want to be closer to Melbourne? And what sort of lifestyle do I want to lead – do I want to be near cafes? Beach?)
- Train travel issues – increased cost of fares and bad connections
- Cost of housing – much better house prices in Geelong Region compared to Melbourne – better value for money and considered a good investment

## **Impressions**

- That it was a million miles away from Melbourne
- Could be beneficial – can't be that bad – incentives were good
- Could be good to live on/near the beach
- It is obsessed with football – all about the footy club
- Industrial, blue collar town - Ford, Alcoa, refineries, factories

## **Observations**

- Doesn't look good when you drive through – sheds up on railways are ugly
- Geelong looks old – “like a forgotten shoe under the bed”
- Eastern beach is good but a lot of other areas in Geelong look they have been neglected

## **Family and Friend's Perceptions**

- Felt like it was a blue collar city but surprised by how different it is – there are many more professional opportunities than first thought
- It's a “big country town” – more focus on local groups – sense of community
- It's not that far from Melbourne – only one hour away
- Not as multicultural as thought it would be – quite an ‘anglo’ culture
- Surprised by how good the music scene is – lot of good bands start in Geelong
- Surprised by how great the food is in restaurants and how many good wineries there are
- Visitors love Geelong when they visit – people find it relaxing and quiet
- It has everything you need but you need to be “in the know”

## **How describe Geelong**

- “It's not too far from Melbourne”
- “Bring your surfboard and stay over”
- “It's like the Seachange show” – builds picture straight away
- “It gets the cool change early”
- “It's not that far and it's not too bad”
- “It's very family oriented”
- “It has good food and wineries”

## Facilities/Services

- Shopping is not broad enough – hard to get into Geelong to go shopping, terrible that you have to pay for parking
- Longer trading hours for supermarkets, chemists, bottle shops – miss Thursday night shopping and Sunday shopping
- Gaps in healthcare system – lack of GPs with Emergency Department not able to fill gap. Hard to get into health clinics. Hard to get medical certificates if you are sick from work. Can take 2 to 4 months to get into a doctor for first appointment
- Lack of public transport within and out of Geelong – buses don't wait for trains at Geelong railway station so you end up having to walk home.

## Lifestyle

- I can get home at such a reasonable time – have more time for family and have an increased sense of wellbeing
- I am busier now – packing more into day
- Because I am further away from family and friends – I have more time to myself
- I am saving more money – not going out as much
- Social networks still developing
- Feel more connected to the community and that there are more opportunities for community involvement
- Feel more connected physically to the community – local pharmacist knows my name etc

## TAC Summary

- Overall, the considerations for TAC personnel had little to do with Geelong as a place, and was a lot to do with the changes to TAC systems
- Employees who had either moved or were considering doing so, invariably commented on Geelong's strong sense of community
- The Surf Coast / Bellarine Peninsula beach culture was a big attraction
- Initially, there were quite negative attitudes towards Geelong but having moved or visited, people were pleasantly surprised at what Geelong had to offer and how close to the coast and Melbourne it is.

## Interviews with Key Business People

Our group conducted a number of interviews with the owners of companies, as well as representatives of State and Local Government bodies. Some very definitive opinions were expressed about living, working and / or investing in the Geelong Region.

Representatives from the following organisations were interviewed:

- Austin Group
- City of Greater Geelong
- Geelong Otway Tourism
- Golden Plains Shire
- Invest Victoria
- Salesforce
- Regional Development Victoria
- Westfield

A condition of interviewing these representatives was anonymity so we have chosen to group their responses accordingly.

There were a number of organisations that were approached to be interviewed but chose not to be involved.

*Refer to **Appendix 3** for a copy of the questionnaires upon which discussion was based*

Some comments included:

- The hardest thing about Geelong is knowing what it's about – I don't understand what the "Geelong proposition" is
- Geelong has some very specific capabilities i.e. textile industry, advanced manufacturing. There's a big supply chain around manufacturing but there's not much else outside manufacturing
- Melbourne is the master brand activity for all of Victoria and Australia and it won't trade off Ballarat or Bendigo in terms of investment opportunities but will look at the regions that will provide the basis for success for investment
- Melbourne is the major brand for everything and Geelong should be on board
- We are not sure what Geelong's core capability is
- Biotech is not under a Geelong banner – it's under an Australian banner
- G21 has a low profile outside Geelong
- Would be prepared to develop a case study with key stakeholders, spending time to see how partnerships could be created. For examples of how to market, look at Virginia, Pennsylvania, North Carolina
- We tried to move our business four years ago but the then Mayor of Geelong told me to 'get lost, we don't want a ....' (business type identifier removed)

- The State Governments have an agreement not to steal business from each other but it was apparent that the then ALP Government was the only one honouring that deal and that's reducing Victoria's competitiveness
- Car parking is ridiculous
- There has been a total lack of investment in infrastructure in Geelong and that extends to available office space / buildings, telephony, utilities, power, gas and water
- The labour market in Geelong suited the new business
- 85% of the Bannockburn population leaves town for Geelong to work or study
- Water is the key infrastructure need and we are hamstrung – we've people who would double the size of their vineyards and other businesses if we were free of those limitations
- Tourism is becoming a significant issue for the region – there's potential for an economy there
- Stieglitz is an example where there is potential to leverage its lack of power, sewerage and water infrastructure into an eco-tourism / environmental opportunity
- Companies move to where they can get talented people. Geelong has a view of itself that is not shared outside the region
- Others see Geelong as a faceless, grey industrial town. The Ring Road will make it easier to drive right past
- What motivates industry to come to Geelong? Cheaper industrial and domestic property prices
- There's no attempt to attract entrepreneurs to Geelong but there is work done to encourage those who are here
- Geelong grapples with the legacy of its past but that's not where the future lies.
- Through the Heales Road Industrial Estate we are trying to pull together like-minded businesses to share resources. It needs to be easy for this to work
- Manufacturing is in decline. Geelong's transition away is slower than that of other areas
- The successful development of business in Geelong is hampered by a lack of infrastructure. There is no conference centre, there is insufficient hotel accommodation and there is a lack of public or private transport.
- Research has painted the typical Geelong person as a middle-aged man who doesn't go out much
- Geelong has the reputation within Australia as being the most expensive place to build anything – whether it be a retail or an industrial facility
- There is a lack of stability and consistency in leadership in Geelong and it is important to get this right for the city and region
- Having an understanding of what the Geelong Region is good at is as critical as is being able to articulate the vision.

## Business Interview Summary

The data collected clearly indicates a number of views about the region including:

### Diversity

Diversity was seen as a key strength of Geelong: Beaches, country side, wineries all within easy reach. A melting pot of different ethnic backgrounds all merged together - not like the segregation and problems of Melbourne.

The full stretch of socio - economic status.. 'some of the richest people in the world send their kids to school here' ...right through to 'The Battlers'.

**One of the strengths of Geelong is the 'sum of its parts'. The fact that there is great diversity in the one place.**

There is a significant amount of diversity of attitudes and aspirations within Geelong.

The key groups include -

**The Battlers** - Referred in relation to the conservative, non-proactive and non-progressive streak to Geelong's character. There is a feeling this group always has and always will be a part of Geelong's character.

**The Optimists** - Aspirational young families - believe that Geelong is yet to come into its own and is moving up in the world. A bit like themselves.

**The Doubters** - Older families and empty nesters who simply don't believe Geelong can pull it off. Their Geelong will always be a tad second rate.

### Diverse but United

Whilst there is diversity, they are united by some core values, including the following:

- A great sense of parochial pride about Geelong
- A common desire for Geelong to be the best it can be
- A shared sense of community and belonging
- And of course, a shared passion for their footy team

## What we love about Geelong

- 'It's got everything. Quiet and away from the madness of the city yet all you could need. Beaches right on our doorstep. Great place for families.'
- 'It's a strong community here. We all know each other. All very close knit....'
- 'Great place for families'
- 'The best of both worlds is in Geelong - peace and quiet if you want it but then shopping in every suburb.'
- 'There is only 2 degrees of separation in Geelong which means there are less barriers between people. When you meet someone for the first time chances are they went to school with your brother or something..so you feel like you already know them in a sense..'

**There is clearly great passion and pride for Geelong and all it embodies.**

## Weaknesses

- A few individuals hold all the power
- Just one newspaper - not enough debate and scrutiny
- 'Closed shop' mentality
- A culture resistant to change
- When it comes to business there is the tall poppy syndrome
- We criticise before we praise
- We have so much potential but it all gets knocked on the head
- Not big thinkers in Geelong
- No vision for the future
- They keep the status quo and not move forward - keeps it in the comfort zone

**There is a frustration that Geelong is holding itself back and not capitalising on its potential.**

## A Sleepy Hollow

This aspect of Geelong was seen as being both a weakness and strength. The country town feel was what people loved about Geelong, but on the other hand there was concern about how the rest of the world perceived them.

'I think people think of Geelong as a bit of a sleepy hollow...a bit of a joke.'

**There is a sense that people are concerned with how the world perceives them...there are streaks of both self consciousness and defensiveness.**

Marketing Research:

If Geelong came to life as a person...

- Male
- Quietly confident
- A bit reserved
- A blokes' bloke
- Introverted but starting to come out of his shell
- Open and approachable, will talk to everyone from a barrister to a labourer
- Well connected and well networked
- Could introduce you to anybody
- Is passionate about Geelong
- Cares and worries about Geelong
- Doesn't celebrate his achievements
- Isn't making the most of his potential
- Needs to improve the way in which he negotiates, to move forward.

**'An ostrich that has just pulled it's head out of the sand and is starting to strut it's stuff!!!'**

Other strong themes that came through from the interviews

- Geelong does not welcome new business
- Infrastructure capacity is poor
- The transition from an old economy to a new economy is stalled / lagging
- People could not articulate one single view of Geelong other than a depressing industrialised city
- Geelong does not do enough to encourage and support new business development and remains oriented towards individual business people residing in Geelong
- Geelong and its movers and shakers are about working within existing structures and people rather than taking a more diverse approach
- Geelong is difficult to deal with. It pushes people back when they want to invest and make a commitment to Geelong
- The Cats' win in 2007 has done more to put the city and region on the map than any other event or promotion around Geelong

# FINDINGS

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Key findings from the research conducted included:

- People outside Geelong have a different perception of the area than local residents
- Geelong is seen externally as a blue-collar area
- Geelong's reputation – internally and externally – is increasingly as a violent and down-market (scummy) centre and this is not helped by sensational media coverage
- Desktop research showed that people unfamiliar with the Geelong region would not be able to discover or understand the many positives –and that Geelong did not promote itself as well as other 'second cities'
- External internet critiques of Geelong are negative
- There are limited efforts in marketing the Geelong Region
- There is no clear branding for the Geelong Region and this makes it difficult to market to any groups of potential investors, residents, workers...
- Relationships that stimulate and attract new investment should be improved
- Tourism marketing bodies have been hostile towards one another and this restricts Geelong's ability to brand and 'sell' the region
- Geelong has relied too much in the past on being the 'Gateway to the Great Ocean Road' – rather than being a destination in itself, whether that be for visiting as a tourist or living as a resident
- The Ring Road is an opportunity and a threat because if Geelong is not seen as a destination, the new road will make it easier for people to bypass
- Anecdotally, the Geelong Football Club's success in the 2007 premiership has given Geelong a far more positive image than previously
- Geelong hosts a significant number of high profile events – including Skandia Geelong Week, AFL matches and international cycling – that promote a positive profile nationally and internationally
- The regulatory regime in Geelong doesn't encourage business development
- Geelong seems to be 'going it alone' rather than leveraging off Victorian and Federal support opportunities
- Business factions are splintered, resulting in reduction of overall marketing and development capacity for the region and short-termism approaches
- There is a lack of delivery on actions articulated through G21 publications
- It is not clear which members of G21 are accountable for the implementation of actions
- There is no direct discussion between Invest Victoria and regional local government authorities
- Geelong is under-serviced across retailing and other sectors
- Geelong is generally uncompetitive in the labour market compared to salaries and career opportunities in Melbourne

- The discussion around skills is overshadowed by manufacturing and doesn't focus on the key services sector that now dominates employment in the Geelong region
- Melbourne is seen as a threat / competition rather than an opportunity for Geelong
- The external negative image of Geelong is counteracted once people experience it

# DISCUSSION

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The research group identified that in the coming decade, diverse stakeholder groups will have to work together closely if we are to ensure a strong future for the Geelong Region. Just as the State Government relies on individual regions to participate in state programs, regions like Greater Geelong must rely on all levels of government, academia, utilities, the private sector and non-profit organisations to contribute to regional marketing programs and effort.

Strategic planning is a critical element for articulating a shared vision, and for building the partnerships that are necessary for disparate organisations to work together on common regional goals.

The key is to identify parallel needs that are shared by many stakeholder groups rather than be dominated by a few. For instance, it is easy to envision that a 'single voice' approach to marketing on a routine basis would be useful to almost all stakeholder groups

The closest we came to discovering a single voice was during our discussions with Geelong Otway Tourism which has drafted a Masterbrand concept for tourism in the Greater Geelong Region. Effective strategic planning is essential for developing and moving collaborative marketing programs forward and gaining the required support in the G21 region.

This research group has not set out to 'point the finger' or assign blame for the lack of a collective regional marketing effort; but identifies an opportunity to develop a system of collective accountability.

# RECOMMENDATIONS

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Based on the findings of our research, and to attract people and businesses to live, work and / or invest in the Geelong Region, we recommend a number of essential actions.

## **1. Create an independent and transparent marketing / branding organisation or system that is above reproach in its governance and ownership:**

- This is critical to avoid perceived or real negative self-interested influences from the private sector, business and political organisations within the region.
- Potentially this might mean creation of an organisation that is separate to G21, rather than harnessing the existing research and planning structure.

The new brand manager / marketing organisation must encourage regional stakeholders to reflect on and evaluate their own marketing practices and ask what they are doing – or not doing – that contributes to the poor perceptions of Geelong.

Private and public sector networks that exist for their own benefit must be re-modelled to operate for the overall benefit of the Geelong region.

## **2. Progress the existing G21 Marketing Strategy as a matter of urgency to develop a master brand from which a marketing campaign would be implemented.** The master brand should address the diversity of the region by reflecting the needs of:

- Industry / business
- Lifestyle
- Tourism

The Marketing Campaign must:

- Address the different requirements of the local government areas represented through the G21 region
- Leverage from high profile events in Geelong
- Articulate the future direction for the Geelong Region and identify the resources required to achieve this

Describe, through the brand:

- What the Geelong Region offers
- Who we are
- What we can do or aspire to do
- What we know
- What resources we have

- 3. Undertake a regional skills audit / gap analysis, using existing material to determine the actual state of business and industry in Geelong.**
- 4. Use gap analysis results to target and attract new investments that will underpin the economic development of the region.**
- 5. Promote the Geelong brand to harness the energy and financial power of businesses and the community to invest in a stronger future for the region.**
- 6. Co-ordinate and align Geelong marketing and economic development strategies with Local, State and Federal Government initiatives by linking Invest Victoria directly with Geelong Region Local Government Areas (LGAs).**

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# APPENDIX 1: DESKTOP RESEARCH

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## Wollongong

Wollongong is Australia's ninth largest city and is slightly smaller than Geelong, Wollongong has around 191,000 residents. It is a coastal centre and is the Primary city of the Illawarra region. Very similar to Geelong in its proximity to its state capital city Wollongong also has good transport infrastructure and the deepest harbour on the eastern seaboard. It also has very good freeway access to Canberra and the south coast. Key economic sectors include manufacturing, education, technology research and development, coal mining, retail services, tourism, port activities, health and community services and it is home to the largest integrated steel plant in the Southern Hemisphere. Wollongong enjoys a magnificent natural environment ranging from rainforests to spectacular sea cliffs and unspoilt beaches and with its mild temperatures is a popular destination for tourists.

Wollongong is very much promoting the lifestyle available in the region (i.e. sea change) along with the knowledge based industries in the local region. With the economic downturn of the early 1980s, Wollongong began to diversify from its heavy industrial roots and is now a centre of higher education, technology and other leading-edge industries, and tourism. It has built a reputation as a centre of excellence in advanced technology and research. The Wollongong University is internationally recognised and has twice been named Australian University of the Year. Progression towards growing technology and research sectors and maintaining strong manufacturing has included expansion of the Port of Port Kembla, upgrade of the Princes Highway and employment initiatives such as the Illawarra, Shoalhaven & Southern Highlands Apprenticeship Project..

Wollongong - the city of Innovation' is the branding statement which is synonymous with literature promoting Wollongong. There is a two pronged approach to marketing the region - attracting people to relocate for employment opportunities and promoting the regions attractions to the tourist market. Thriving knowledge based industries promoted, may be particularly aimed at the 'Y Generation' and younger workers as lifestyle is a feature of promotions of employment industry. Lifestyle is a much higher consideration with the younger generations when they are making employment choices. Tourism is also promoted as a thriving industry to attract investment into the region.

Desktop research of Wollongong leave one with a perception of a thriving local economy with knowledge based employment and a great place to live. The challenges of a downturn in manufacturing in the 1980s seem to have been overcome by specifically targeting growth in sectors which employ knowledge workers. This has allowed the city to establish and promote these niche industries successfully and demonstrate a successful transition from very high manufacturing base to key employer in higher education, technology and other leading-edge industries. A key strategy in this transition has been the development of the University of Wollongong which is an award winning university ranked among the top eight universities in Australia and in 2006 was ranked in the top 200 universities in the world – a considerable honour for a regional university. It is an international university with over 18,000 students spread across three campuses and five access centres and offers a range of courses from nine faculties.

Geelong is following a similar path to Wollongong with the decline of the previously strong manufacturing sector and the development of science and technology precincts, particularly through Deakin University. Revitalising Geelong may be achieved through attracting and engaging new residents through attractive employment options combined with a better lifestyle. This seems to be a strong strategy in attracting the residents we need to meet the needs of our growing community by attracting specialised industries to invest locally because we can meet their skills needs. A strategy of attracting younger workers to the region is necessary to balance the growing age of the residents of the region i.e. large population who are no longer in the workforce.

## **Fremantle**

Fremantle is a regional centre located about 25kms south of Perth at the mouth of the Swan River. The city has a strong history as a meeting place for aboriginal people and functioned as a working harbour and fishing centre. With around 180,000 residents Fremantle is a rich mixture of cultures and a strong labour history. It has a mediterranean climate and attracts over 12 million visits annually (including return trips). The city has vibrant local economy and is an important regional centre. The significance of Fremantle as a place for business extends far beyond the local community. Fremantle's catchment area extends well beyond the city borders and takes in excess of 200,000 residents. Fremantle is the largest metropolitan retail centre outside of Perth. The distinctive nature of a port city and the availability of warehouses made vacant by the modernisation of the port attracted artists and arts organisations seeking low cost accommodation. Many Arts organisations are housed in historic buildings providing a contemporary use for some of the most spectacular reminders of an earlier history.

Arts and culture are very strongly promoted in any information about Fremantle. There is very strong promotion of the artistic and cultural aspects of the region to attract tourists and visitors, both from locally and overseas. The city offers a unique blend of a lively multicultural yet relaxed lifestyle and is a 7 day city. Visitors to Fremantle can experience contemporary circus, fine crafts, original music and theatre, exciting galleries, museums, bookshops and buskers. Along with maritime history and extensive architectural conservation, the Arts have become a central part of Fremantle life where visitors can discover the past and present. Fremantle is promoted to provide a unique opportunity for visitors to experience and enjoy a range of cultural activities in a relaxed atmosphere including browsing through the markets or leisurely stops at numerous cafes and restaurants to complement their exploration of the arts. All this is said to make a visit to Fremantle a rich and rewarding experience. Strong indigenous influences are evident in the promotion of cultural aspects in Fremantle along with strong southern European influences in the fantastic array of restaurants, entertainment, festivals and maritime activities and lively conversations.

There are no obvious branding/positioning statements about Fremantle however the following phrase is used to promote the city on a tourism website. 'Fremantle, Western Australia: an intoxicating mix of caffeine, festivals and heritage'. Most promotion on Fremantle focuses on attracting visitors to the region and include promotion of: the indigenous history of the region; the port; historical buildings; arts and culture precincts; the coffee culture; food and the eclectic and multicultural mix of residents. Along with the strong focus on tourism Fremantle is promoting that they preserve and protect history and heritage.

Fremantle seems to be a city with a very strong sense of identity. Although there are no clearly identified branding/positioning statements for Fremantle there are copious amounts of readily available information on the tourist attractions in the area, what visitors can see and do and where to stay. Most web based information about Fremantle has the purpose about informing and attracting potential visitors to the region and ensuring a continuing strong tourism trade. There is little doubt after conducting desktop research that Fremantle is proud of what it has to offer visitors and tourists and is focussed on attracting the tourist dollars. In conjunction with tourism the city has been able to transform their underutilised port area into a thriving arts precinct, thus attracting more visitors to town and providing low cost accommodation for artists in buildings which were no longer needed after modernisation of the Port facilities.

Fremantle is very clear in what and how they wish to market their city. They focus very narrowly on attracting the tourism dollars to town however they differ from Geelong in that they seem to cater to a vast array of visitors needs. They have diverse natural landscape attractions, strong and interesting history, thriving arts and cultural industries, a vast array of restaurants and a strong and clear strategy to welcome and meet the needs of all tourists. Geelong does not seem to meet these diverse needs of tourists in such a clear and planned manner. Such a strong single minded focus on tourism would not be suitable for Geelong as it has more to offer.

## **Bendigo**

Bendigo is the third largest regional centre in Victoria and is the major regional centre for North central Victoria. It is strategically placed at the link of three major highways and junction of several rail links. It currently has around 100,000 residents and its population is growing at a much faster rate than the state average. Bendigo has a rich heritage and history with strong links back to the gold rush era. There were also many Chinese settlers in Bendigo during the gold rush era and there is a particularly strong Chinese influence on many historical and cultural events and buildings. Bendigo is the major regional centre for many regional communities in the north and centre of the state and has extensive health services including Victoria's largest regional hospital. There are also many tourist attractions in Bendigo to attract visitors to town. These include Deborah Gold Mines, Talking Tram, Bendigo Pottery, Chinese Joss House and the Chinese Dragon. One of Bendigo's major challenges is water sustainable water use. A growing population and lower than average reservoir inflows for the past eight years have combined to create an urgent need for reduced consumption, recycling and efficient water use if Bendigo is to continue to grow and prosper.

Bendigo are promoting themselves as a progressive regional centre to attract residents with clean air, no noise pollution and affordable housing to attract residents to the area. They are focussing on ways of attracting and retaining young adults in the town as a means of maintaining a strong labour force. They have identified that outward migration is made up mainly of 20-29 year olds, leaving possibly for further education, lifestyle/experience and employment in larger cities. They are hoping to stem these flows of young adults by enhancing the education/employment opportunities in the region. They are also promoting the tourist attractions in the region to potential visitors. Tourism is significant to Bendigo and the major goals of Bendigo tourism are: Increase visitation, length of stay and tourism yield; Develop Bendigo Tourism as an effective marketing organisation; Encourage the Industry to assume greater responsibility for leadership; Maximise Greater Bendigo as a quality destination involving a welcoming community that enriches the visitor experience; Build key relationships/partnerships with major State, Regional, Industry, marketing, business and media stakeholders; and Build and maximise Business Events and Major Events as key attractors for Greater Bendigo.

There seem to be two main positioning statements used by Bendigo to attract potential residents. They are: 'Fall in love with Bendigo - 90 minutes from Melbourne' and 'Time for an affordable, regional, great career change - A change for the better'. Web research can uncover quite an amount of literature about moving to Bendigo, new residents guides etc for people who may be considering the move. In much of this literature Bendigo is promoted as progressive, having a mild climate, affordable housing, clean air, diverse attractions, cultural treasures and a thriving economy. Bendigo sells itself well as a potential place to live if you are seeking a 'tree change'. They outline very well the key strengths of the region and provide much literature for research on the area. However although Bendigo has acknowledged that they need to attract and retain young adults into the region there does not seem to be enough focus on the training and employment opportunities available in the area. History and heritage come across as very important to the people of Bendigo and it seems that they are inordinately proud of their background. Bendigo promotes itself similarly as Ballarat does as an alternative to living in Melbourne however they also promote themselves as a major regional centre for business and residents in the north and centre of the state. As with Geelong they need a more targeted direction to attract the residents who can enhance the lifestyle in the town i.e. young professionals, young families etc. There is much promotion of the affordable housing in Bendigo which should be a key area promoted by Geelong with our close proximity to Melbourne.

### **Dundee, Scotland (knowledge city - focus on community)**

Dundee is the fourth largest city in Scotland- it is the most densely populated area in Scotland after Glasgow. It's population is 143,090. It is known as the "city of discovery" in honour of it's history of scientific activities and of the RRS Discovery ship which was built in Dundee and is now berthed there. The biomedical and technology industries have grown since the 1980s and the city now accounts for 10% of Britain's digital entertainment industry. Dundee has two universities - University of Dundee and University of Abertay Dundee. It had a major maritime and shipbuilding industry in the 19th century. Dundee is a regional employment and education centre, and is Scotland's most important retail centre after Glasgow and Edinburgh, with over 300,000 persons within 30 minutes drive of the city centre and 700,000 people within an hour. Recent and current investment levels in the city are at a record level. Employment in Dundee has changed dramatically during the 1980s with the loss of 10,000 manufacturing jobs due to closure of shipyards, cessation of carpet manufacturing and the disappearance of the jute trade. The largest employers in Dundee are the city council and the National Health Service, which make up over 10% of the city's workforce. The biomedical and biotechnology sectors including start-up biomedical companies arising from university research, employ just under 1,000 people directly and nearly 2,000 indirectly.

To combat growing unemployment and vulnerable economic conditions, Dundee was declared an Enterprise Zone in January 1984. The main new growth areas have been software development and biotechnology along with retail. They have since developed a Dundee Partnership Community Plan 2005-2010. It emanated from a Dundee Partnership Forum in September 2004. It was agreed that the confidence of Dundee's people and businesses played an important role across the community planning agenda. It appears that they are promoting themselves primarily through the Dundee Partnership ([www.dundeepartnership.co.uk](http://www.dundeepartnership.co.uk)) which involves a range of stakeholders in Strategic Theme Groups: Building Stronger Communities, Community Safety, Dundee Environment, Health & Care, Lifelong Learning and Work & Enterprise. The Partnership is structured in a way that provides direction, makes decisions, and considers thematic strategies and cross-cutting issues which affect the Partnership as a whole. It also addresses the city region in collaboration with neighbouring community planning partnerships. More detail can be found in the Community Plan which has a clear brand for "Dundee Partnership".

Dundee City Council homepage has the following statement profiled "Changing for the future" (<http://www.dundee.gov.uk/>). This implies that they are an innovative, forward thinking city who are seeking to reinvent themselves, and will not allow themselves to become stagnant and irrelevant. This is summarised best by Rt Hon Jack McConnell, First Minister on 18 March 2005 who said "If ever there was a question about the progress we are making, we just need to look around the corner of Dundee. 20 years ago, Dundee had almost forgotten its proud history of entrepreneurship and invention. But today, Dundee is now on its way back up. Every time I go to Dundee, there is a difference in the city. There are more jobs and fewer unemployed. New businesses, regenerated communities, a waterfront transformed and two outstanding universities." Dundee appears to be a "city on the move" that is focussed on enabling the community to work together to achieve it's vision of being "A thriving regional shopping, service and employment centre, where people can realise their potential; are proud to live and work and which tourists consider visiting". They understand and articulate that there needs to be an understanding of less tangible aspects of regenerating a city such as self-confidence, self-esteem and positive attitude. A lack of confidence can have a detrimental effect on entrepreneurial initiative, educational attainment and dependency.

Geelong faces a similar predicament to Dundee in that we are traditionally a manufacturing based city that is needing to establish a clear direction for the future. The statement "Changing for the future" has a real sense of optimism and confidence in the future, and reflects how the Dundee Partnership approach is enabling people to regenerate their community from the inside out. They are basing their future on being a regional education and employment centre where less traditional industries are driving growth such as biomedical, software development and retail. It's great to see that Dundee has sought social inclusion for their less fortunate areas and has included them within their Community Plan and is focusing on neighbourhood renewal - this has obvious correlations with Geelong's northern suburbs

### **Bilbao, Spain (cultural city - focus on tourism)**

Bilbao, (Bilbo in Basque), in the North of Spain, is the largest city in the Basque Country and the capital of the province of Biscay (Basque: Bizkaia). The city has over 354,000 inhabitants (2006) and is the most economically and industrially active part of Greater Bilbao, the zone in which almost half of the Basque Country's population lives. Greater Bilbao's 946,829 inhabitants are spread along the length of the Nervion River, whose banks are home also to numerous business and factories, which during the industrial revolution brought heightened prosperity to the region. Bilbao is the industrial hub of the north and the Basque people's political capital. Shipping, shipbuilding and steel making have made it prosperous. The city has recently undergone major urban renewal in order to move away from the region's industrial history and instead focus on tourism and services. The developments are centred around the new metro system and most of all the Guggenheim Bilbao Museum by Frank Gehry. As well as the famous Guggenheim Museum, the city acts as home for the Fine Arts Museum recognised as one of Spain's finest art museums and the Maritime Museum. Since the inauguration of the Guggenheim museum in 1997, eight new hotels have been opened in the city. The Bilbao Live Festival, initiated in 2006, is another measure of new interest. Whilst the overall region's population continues to climb, the city centre has noticed a drop in residents. This is a result of the steady and seemingly unbreakable trend of the city's people flocking to the coastlines, caused mainly by the high real-estate prices in Bilbao.

The industrial crisis of the 1980s had an enormous effect on Bilbao. Closure and modernisation of a considerable section of industry had a huge impact on the entire waterfront and initiated a general process of urban transformation. Recovery of those old industrial spaces and transfer of harbour activities to the outer bay has allowed the city to look out over its waterfront and initiate a general process of urban transformation. The spaces once used by shipyards, container areas and blast furnaces are now riverside promenades, open-air art galleries, new districts and business zones, where quality architecture is one of the keynotes of this renovation project. Transformation of the city is creating an economic framework focusing on services, culture and new industry. A company called Bilbao Ria 2000 was created in 1992 with the intention of recovering former industrial space. It is a non-profit making entity of public authorities focusing on the common task of transforming Bilbao ([www.bilbaoroa2000.org](http://www.bilbaoroa2000.org)). It publishes a six monthly magazine that profiles the work that is being carried out (the last edition was June 2007). There are also books available for purchase from the website such as "Bilbao, culture as a city project".

Bilbao's official website at [www.bilbao.net](http://www.bilbao.net) displays the following statement "Bilbao. Always in your heart." It's a very modern website which seems to feature 'culture' and 'tourism' more predominantly than anything else. It is being marketed as a vibrant, modern metropolis that is a great place to visit. Underneath this 'spin', it has a gamut of ambitious architectural and general infrastructure projects fuelling urban and financial regeneration of the city. It is being positioned as the cultural centre of Spain with a brimming cultural calendar, with two of the best art galleries in Spain, six themed museums, countless contemporary art exhibitions and a continuous series of shows and performances.

Bilbao is perceived as a cosmopolitan city that embraces modernism through its Guggenheim museum and commitment to transformation through architectural and building brilliance. It has undergone a major transformation from an industrial town into a modern European centre of business and culture fuelled by Bilbao Ria 2000. The Guggenheim Museum is seen as being the project that has revitalised the economic structure of Bilbao and transformed it into an international destination.

Geelong faces similar pressures to Bilbao due to an ailing industrial base with the potential to reinvigorate the city around the waterfront and invest in an international tourism attraction that would bring a cultural focus to the city and establish it as a cultural centre. However, this direction seems to give precedence to tourists/visitors rather than the community and puts appearances before everything else so there is a potential to lose our sense of community if we go down this track. Our population is not decreasing in the same way as Bilbao and in fact is attracting people to move here due to relatively lower real estate prices and great lifestyle opportunities.

## **Ballarat**

Ballarat is an inland regional city in the South West of Victoria with a population of around 90,000 people. It is about 90 minutes from Melbourne CBD and is strategically located with good transport infrastructure. Ballarat is in a key strategic position at the centre of some of Victoria's most important freight, tourist and commuter transport routes. The four main highways radiating from Ballarat - the Western, the Midland, the Glenelg and the Sunraysia - connect it to industrial centres such as Melbourne, Adelaide, Geelong and Portland; regional locations like Bendigo and Mildura; and agricultural areas in the Mallee and Wimmera.

The city is well provided for with health, education and community services and has maintained a strong community minded spirit. Ballarat has traditionally been a city that prospered on mineral and agricultural based resources, however this has changed. Manufacturing, tourism, health and community services, education and retailing are now the key industries in the city. These industries, along with the banking and finance sector and government services are strengthening Ballarats role as a regional service provider. The information technology sector is emerging to become a significant industry within the region. The municipality hosts a modern communications network that provides easy data exchange worldwide. Strategic partnerships with the locally growing information technology sector and tertiary institutions are adding to Ballarat's increasing importance as a knowledge centre within Victoria. Ballarat is also developing as a televillage through which the percentage of Ballarat homes that are online and the number of business transactions undertaken by e-commerce will increase.

Ballarat is now promoting three main areas: one of Victoria's premier tourist destinations; an inland regional hub; and affordable housing as an alternative to city living. A decline in traditional industries such as mining and rural sector activities and a high unemployment rate has seen Ballarat focus on marketing themselves as a highly-skilled, educated employment area through the promotion of its diverse, high quality educational and research facilities, developing technology-based sector, and the size, quality and sophistication of its health sector. Specifically they are also aiming to increase post-45 year old participation in the workforce as they have a higher than state average age of residents and need to maintain an adequate work force for local needs. Ballarat also wants to attract new residents at a rate that enables the local economy to compensate for its rapidly ageing population and low birth rate, ensuring it has the right population mix to thrive as the regions hub while allowing Ballarat to retain its character and strong sense of community.

Ballarat is using the catch phrase - 'My Choice for Living' in their literature to attract new residents to the area. This marketing is very much directed to families with incentives of up to \$20,000 worth of discounts to people who become permanent residents in the region. Many of these discount vouchers are for family activities. Ballarat has also developed programs and incentives to create on-going links with former and current Ballarat secondary, TAFE and university graduates as a source of future long-term residents, in order to maximise opportunities for their settlement in Ballarat and their promotion of Ballarat's advantages, including seeking consent from past, current and future Ballarat graduates and creating a database of these graduates. This is particularly targeted to meeting labour market needs in the local area as well as attracting new residents.

Ballarat is thriving as a strong regional hub and is currently experiencing strong growth in residents, higher than the state average. However much migration into the Ballarat area is from country residents who are retiring from the land - these retirees are not helping to address the skills shortages in the local labour market. Ballarat is very focussed on attracting new residents with strategies well set out in Blueprint Ballarat, including incentives to new residents and investors. Ballarat seems very focussed on becoming an alternative to people living and working in Melbourne. This is a very similar strategy that we can take in Geelong considering our close geographic proximity to Melbourne. The focus is not just on lifestyle in Ballarat but on employment opportunities including partnerships developed with the local universities and learning centres to move towards a knowledge-based city. These partnerships and the programs in place to retain local university graduates in the town are relevant to Geelong in maintaining a work force to ensure a strong local economy and attract investment into the region.

# APPENDIX 2: TAC FOCUS GROUP QUESTIONS

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## Leaders for Geelong

### Marketing Project Survey

## TAC employees not moving to Geelong

The aim of these focus groups is to gain an understanding of the key factors for people considering moving to Geelong. We appreciate your time and hope that you feel free to be honest and open in your comments. Your individual responses and details will be kept strictly confidential.

The Leaders for Geelong Program (LfG) is an initiative of the Committee for Geelong, a group of key local stakeholders that examines current and future opportunities for the region). The LfG is a two year intensive program exploring major challenges and opportunities for the region, including a research-based community project. The information collected today is to be used as part of Regional Marketing Strategy (research project) being conducted to help understand the factors that attract people and businesses to live, work, visit and invest in the Geelong region.

The questions we will discuss in the session are set out below.

- Q1 What were some of the key factor/s in your decision not to move to the Geelong Region?**
- Q2 What were some of the issues you had to deal with before making your decision not to move?**
- Q3 What were your impressions of Geelong and the Region before TAC announced it was relocating?**
- Q4 Have you visited Geelong to view the city or region? If so, what were your observations and views – favourable or otherwise?**
- Q5 Has your perception changed from your initial view of Geelong and the Region? If so, in what way?**
- Q6 Are there any facilities or services you were not able to locate in Geelong or surrounding areas?**
- Q7 Would the Geelong region meet all of your community needs. If not, how not?**
- Q8 When you tell people why you are not moving, what do you say?**

Thank you for your assistance.

## **Leaders for Geelong**

### **Marketing Project Focus Group**

#### **TAC employees moving to Geelong**

The aim of these focus groups is to gain an understanding of the key factors for people considering a move to Geelong. We appreciate your time and hope that you feel free to be honest and open in your comments. Your individual responses and details will be kept strictly confidential.

The Leaders for Geelong Program (LfG) is an initiative of the Committee for Geelong, a group of key local stakeholders that examines current and future opportunities for the region). The LfG is a two year intensive program exploring major challenges and opportunities for the region, including a research-based community project. The information collected today is to be used as part of Regional Marketing Strategy (research project) being conducted to help understand the factors that attract people and businesses to live, work, visit and invest in the Geelong region.

The questions we will discuss in the session are set out below.

- Q1 What were some key factor/s in your decision to move to the Geelong Region?**
- Q2 What were some of the issues you had to deal with as part of making your decision to move?**
- Q3 What were your impressions of Geelong and the Region before TAC announced it was relocating**
- Q4 Since making your decision and having visited the region, what are your overall observations of Geelong?**
- Q5 Has your perception changed from your initial view of Geelong and the region? If so, in what way?**
- Q6 How do you describe Geelong to people when you tell them you are moving?**
- Q7 Are there any additional facilities or services you would like to be available in Geelong that you haven't been able to find?**
- Q8 How do you see your lifestyle and your connection to community changing with the move and what are you most looking forward to?**

**Thank you for your assistance.**

# APPENDIX 3: QUESTIONNAIRES

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## Leaders for Geelong

### Marketing Project Survey

Our aim is to understand the drivers and constraints in establishing and running businesses in Geelong. To answer to a question please write your response as needed. If you do not wish to answer a question, or if is not relevant to you, please leave that question blank. We appreciate your time and hope that you feel free to be frank in your comments. The answers will be kept confidential and companies and individuals involved will not be identified.

### Local Manufacturing Companies

Q1	Why is your business in Geelong – rather than elsewhere in the region or the State?
Q2	Are you satisfied with Geelong as a site for your manufacturing business?
	If so, why?
	If not, why?
Q3	What factors keep your business in Geelong?
Q4	What advantages or disadvantages does Geelong have as a manufacturing site? What are they?
Q5	Would you expand your business in Geelong? If so, what factors would influence you either way?

<b>Q6</b>	<b>Would you move your business away from Geelong? If so, what factors would influence you to do so?</b>

**Thank you for your assistance.**

## Leaders for Geelong

### Marketing Project Survey

Our aim is to understand the drivers and constraints in establishing and running businesses in Geelong. To answer to a question please write your response as needed. If you do not wish to answer a question, or if is not relevant to you, please leave that question blank. We appreciate your time and hope that you feel free to be frank in your comments. The answers will be kept confidential and companies and individuals involved will not be identified.

#### Global Companies already located in Geelong Region

<b>Q1</b>	<b>If you were looking for a new site for a manufacturing operation, what human and physical attributes would you need to help in your decision-making? i.e. skilled workers, proximity to ports, transport connections, availability or resources – water, power, accommodation?</b>
<b>Q2</b>	<b>What scale of human attributes would attract you (how big a skill pool would your require)?</b>
<b>Q3</b>	<b>What types of skills would you require to establish a new or bigger manufacturing operation in Geelong?</b>
<b>Q4</b>	<b>If your company was contemplating building another manufacturing plant, would it consider Geelong as possibility?</b>
	<b>If so, why?</b>
	<b>If not, what are some of the impediments?</b>
<b>Q5</b>	<b>Do you think the City of Greater Geelong or the State Government have any control or impact (positive or negative) on issues that would play a part in your company's decision making on siting or building new manufacturing facilities?</b>

<b>Q6</b>	<b>What are the key issues that help you make decisions to invest? For instance, are issues such as foreign exchange, costs, regulations and industrial relations critical to this sort of decision making?</b>
<b>Q7</b>	<b>Does Geelong have advantages or disadvantages as a potential manufacturing location? What are they?</b>