TOURISM | GEELONG AND THE BELLARINE | URBIS

Sustainable Destination Master Plan

2026 Refresh



Tourism Greater Geelong and The Bellarine
September 2026

Acknowledgment of Country

We acknowledge Geelong and The Bellarine is Wadawurrung country.

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

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



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The Region Refreshed

Greater Geelong and The Bellarine is an active outdoor region, providing variety across sport and recreation pursuits, a diverse range of appealing food, beverage and producer experiences, and a growing range of quality cultural experiences.
Its sub-regions are distinctive with high appeal and provide significant draw across multiple visitor markets.

4.38M
average **daytrips** 2023-24
+400k since 2017-19

4.61M
average **domestic** visitor nights 2023-24
+850k since 2017-19

1.29M
average **international** visitor nights 2023-24
+23k since 2017-19

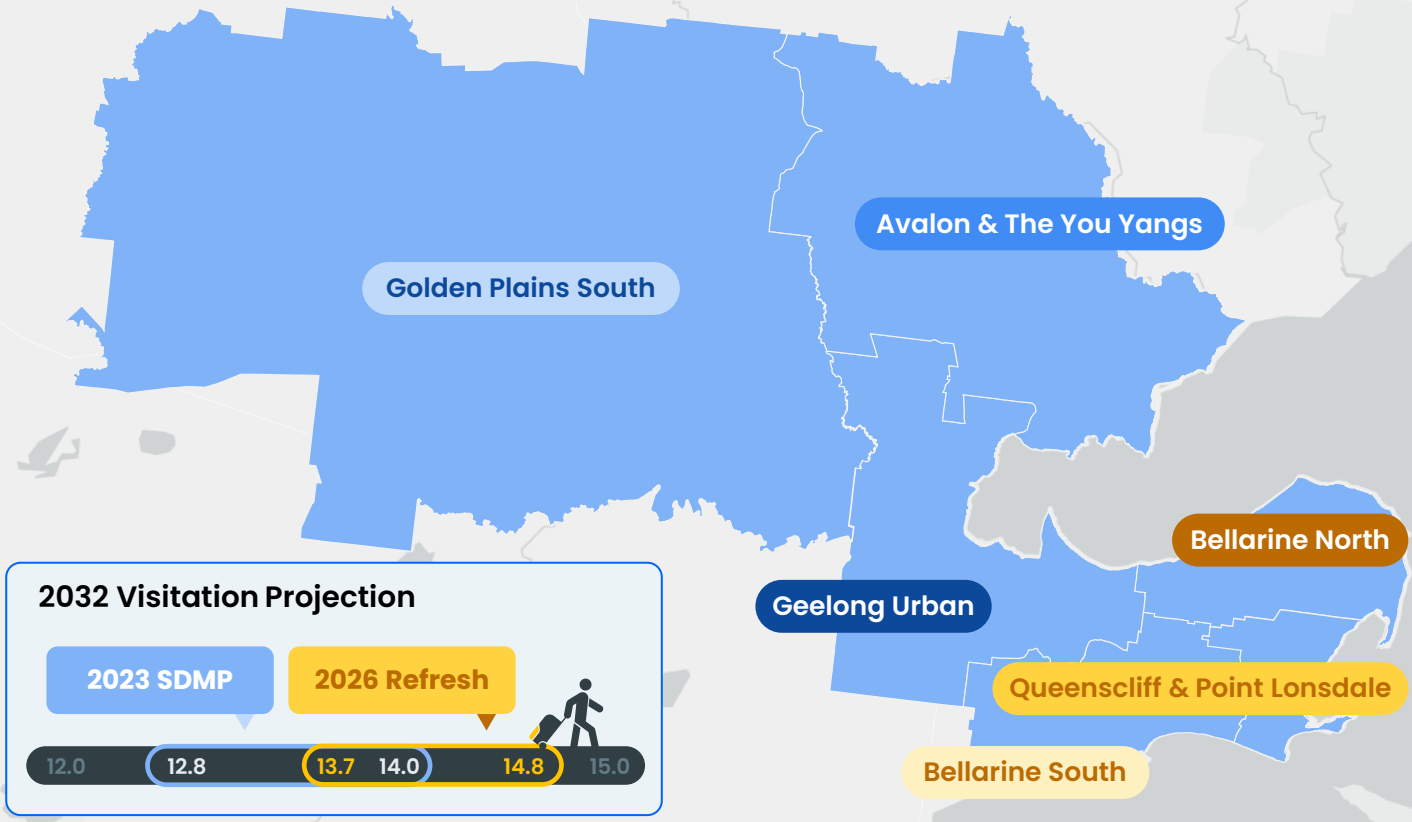
Source: Tourism Research Australia. Based on 2-year average 2023-2024

The purpose of the Sustainable Destination Master Plan is to drive a stronger, more resilient visitor economy for the future. To achieve this, we engaged with stakeholders from the region to understand the current issues and future aspirations. The outcomes of these stakeholder discussions alongside detailed research formed the basis of the original Sustainable Destination Master Plan (SDMP).

This document is a refresh of the original SDMP that was delivered in 2023 as a 10-year strategy to 2032. The 2026 refresh incorporates new detailed research, as well as newly emerging priorities within the region, whilst maintaining its original duration to 2032.

The 2026 Refresh updates visitation data (shown right) for six sub-regions and compares it with the 2017-2019 data. The level of growth across the region has varied significantly, with Geelong Urban seeing the largest increase.

The region is now delivering the 'high growth' scenario in the original SDMP.



Type of Visitation (2023-24 Average)

Geelong Urban

Domestic Visitor Nights	**2,230k**	**+430k**
Visiting Friends and Relatives	54%	+2% pts
Holiday	22%	+0% pts
Business	18%	+4% pts
International Visitor Nights	**1,125k**	**+175k**
Visiting Friends and Relatives	33%	-5% pts
Education	22%	-19% pts
Holiday	16%	+4% pts
Daytrips	**3,120k**	**+435k**

Avalon & The You Yangs

Domestic Visitor Nights	**73k**	**+22k**
Visiting Friends and Relatives	54%	+16% pts
Holiday	33%	+22% pts
Business	13%	+2% pts
International Visitor Nights	**46k**	**+32k**
Visiting Friends and Relatives	39%	+24% pts
Education	52%	+35% pts
Holiday	3%	-9% pts
Daytrips	**179k**	**-22k**

Golden Plains South

Domestic Visitor Nights	**205k**	**+72k**
Visiting Friends and Relatives	65%	+18% pts
Holiday	22%	-25% pts
Business	12%	+6% pts
International Visitor Nights	**16k**	**+11k**
Visiting Friends and Relatives	3%	-44% pts
Education	17%	+17% pts
Holiday	65%	+48% pts
Daytrips	**138k**	**+32k**

Bellarine North

Domestic Visitor Nights	**558k**	**-63k**
Visiting Friends and Relatives	70%	-1% pts
Holiday	24%	-2% pts
Business	2%	-1% pts
International Visitor Nights	**35k**	**-6k**
Visiting Friends and Relatives	27%	-50% pts
Education	5%	-17% pts
Holiday	65%	+65% pts
Daytrips	**440k**	**+140k**

Queenscliff & Point Lonsdale

Domestic Visitor Nights	**438k**	**-**
Visiting Friends and Relatives	79%	0% pts
Holiday	18%	-2% pts
Business	2%	+1% pts
International Visitor Nights	**28k**	**+18k**
Visiting Friends and Relatives	84%	+32% pts
Education	16%	-27% pts
Holiday	0%	-4% pts
Daytrips	**277k**	**-**

Bellarine South

Domestic Visitor Nights	**1,111k**	**+402k**
Visiting Friends and Relatives	67%	+2% pts
Holiday	32%	+2% pts
Business	1%	-3% pts
International Visitor Nights	**40k**	**+1k**
Visiting Friends and Relatives	33%	-54% pts
Education	58%	+58% pts
Holiday	6%	+2% pts
Daytrips	**348k**	**+18k**

Source: TRA
Note: Variations based on 2017-2019

A Vision for Visitation

Vision Statement



The environments, culture and identity of Greater Geelong and The Bellarine Peninsula provide a strong foundation for a sustainable, resilient and valued visitor economy. The opportunity now lies in cultivating these assets and building an ecosystem that supports their long-term growth and success, enabling the region to attract a broader and more diverse visitor market.

Tourism is a major contributor to the region's economy and community. In 2023–24, the industry accounted for 3.3% of Gross Regional Product and 5.8% of total employment. Having recovered rapidly from the impacts of COVID-19, visitation averaged 5.9 million annually, with tourism spend reaching $2.1 billion and total tourism employment rising to 13,500 jobs.

Continued growth of the visitor economy will deliver broad benefits across the region, supporting local businesses, creating jobs, and enhancing the liveability of Greater Geelong and The Bellarine.

Average of CY 2023 and CY 2024

59M
average annual visitors

61%
visits in Geelong (+1% pts. from 2017-2019)

87%
of visitors arriving from within Victoria

3%
international visitors

19%
from Melbourne's West

10%
of visitation from interstate

68%
of day trips are to Urban Geelong

87%
overnight domestic visitor nights are spent in private accommodation[1]

1. Private accommodation includes private rentals like AirBnB or homestays, non-commercial camping and accommodation owned by the visitor or a relative / friend of the visitor.
Source: Tourism Research Australia , Azira(Human Movement Data)

Where Will Geelong and The Bellarine be in Ten Years' Time?

Geelong and The Bellarine will be a destination with strong growth in visitation driving spin-off benefits throughout the region.

New modelling of three demand scenarios projects that by 2032, the region will attract between 13.7 million and 14.8 million combined day trips and visitor nights each year. This growth will see total visitor spending rise from $1.2 billion in 2022 to between $3.6 billion and $3.9 billion by 2032, representing more than a tripling of tourism's direct contribution to the local economy.

To ensure these benefits are realised across all parts of the region, targeted investment in accommodation and supporting infrastructure will be essential. Demand for visitor nights is expected to reach between 7.4 million and 8.4 million annually by 2032, exceeding current bed capacity. This equates to a need for additional rooms and camping spaces beyond the existing supply pipeline, with particular focus required in sub-regions and accommodation types where gaps are most acute.

Sustaining the region's strong growth will depend on diversifying its visitor mix and attracting high-value emerging markets. The last few years have seen progress in expanding the offer for culture enthusiasts, conference travellers, lifelong learners, wellness seekers, sustainable value travellers and active enthusiasts. Realising the full potential of these segments will hinge on the timely delivery of projects in the development pipeline and ensuring they are supported by targeted experiences, events and marketing.

The projected increase in visitation will also drive significant workforce demand. By 2032, the tourism workforce requirement is expected to grow from 6,940 in 2022 to a baseline of around 17,400, an increase of 10,500 workers. Meeting this demand will require targeted strategies to address shortages in key areas, including a shortfall in Accommodation and Food Services of 550–1,225 roles (baseline to high tourism), as well as skills gaps in retail and transport operations.



The Sustainable Destination Master Plan provides the roadmap to manage this growth, ensuring the industry's potential is realised through coordinated investment, workforce development and market diversification.

Projected visitor economy size FY 2032

13.7M – 14.8M

$3.6B - $3.9B
visitors estimated spend in FY 2032

6,660 – 8,050
additional direct jobs in the region to deliver on up to almost $4 billion of tourism spending in FY 2032

Perspectives of the region

As part of the original Sustainable Destination Management Plan, engagement was undertaken with key stakeholders of Tourism Greater Geelong and the Bellarine. The following stakeholders were directly consulted:

- Avalon Airport
- Batman Management Group
- Borough of Queenscliffe
- City of Greater Geelong
- Committee for Geelong
- Deakin University
- G21 Regional Alliance
- Geelong Chamber of Commerce
- Geelong Manufacturing Council
- GeelongPort
- Golden Plains Shire
- The Gordon Institute of TAFE
- Great Ocean Road Regional Tourism Ltd
- Hamilton Group
- Parks Victoria
- Regional Development Victoria
- The Sharp Group
- Victoria Tourism Industry Council
- Visit Victoria
- Wadawurrung Cultural Heritage Aboriginal Corporation



Limitations identified during the original consultation remain relevant:

- Quality and type of accommodation
- Limited facilities to capture business market
- Lack of accommodation on the Bellarine
- Insufficient commercial nature-based options
- Lack of connectivity between experiences
- Workforce shortage
- Strong seasonality and weekend / weekday troughs
- Worker housing not affordable
- An impression of unbalanced daytrips within the region

Key Challenges

The key challenges identified in consultation remain the same. Addressing these challenges has informed the actions included in the SDMP and refreshed in this update.



Seasonality

Positioning as a year-round option

The seasonal nature of tourism challenges the long-term financial sustainability of businesses, highlighting the need to diversify visitor experiences beyond weather-dependent offerings and to better disperse visitors across sub-regions.



Workforce

Getting access to a local workforce

Rising living costs and limited career pathways are driving locals out of tourism roles, increasing reliance on external labour markets and resulting in staff shortages that restrict businesses from operating at full capacity.



Costs

Cost pressures continue to mount

High wage costs and labour shortages, combined with high cost of maintaining the natural environment for low-value visitation, are constraining business viability and sector capacity.



Sustainability

Pressure on workforce and environment is pronounced in peak periods

Seasonal visitation, limited public transport access and growing visitor volumes place pressure on peak periods, constrain off-peak activity and highlight the need to better manage and derive greater environmental and economic benefit from high-volume, low-value visitation.



Accommodation

Shortage of accommodation limits the region's capacity

A shortage of high-quality and experiential accommodation, combined with high costs and the loss of long-term housing to short-term rentals, is limiting visitor appeal and constraining the supply of affordable housing needed to attract and retain tourism workers.



Marketing

The region's stories and experiences are not well known

A lack of a clear point of difference is limiting the region's ability to leverage its natural, local and cultural heritage assets, highlighting the need for stronger, well-packaged visitor experiences that attract higher-value visitors.

Future Outlook

This section takes a forward look at the outlook for the region.

The region is in a strong position with a number of investment projects recently completed, underway or set to be completed by 2032, including several completed since 2022. This will drive the ability to draw aspirational markets and grow visitor levels and spending in the region. Of course, more visitors leads to the need for an aligned local workforce to support the tourism industry.

To understand the opportunity for the region to 2032, this section looks into:

- Development activity and resultant visitor and spending growth
- Future workforce growth and shortages
- The specific skills needed in each of the sub regions



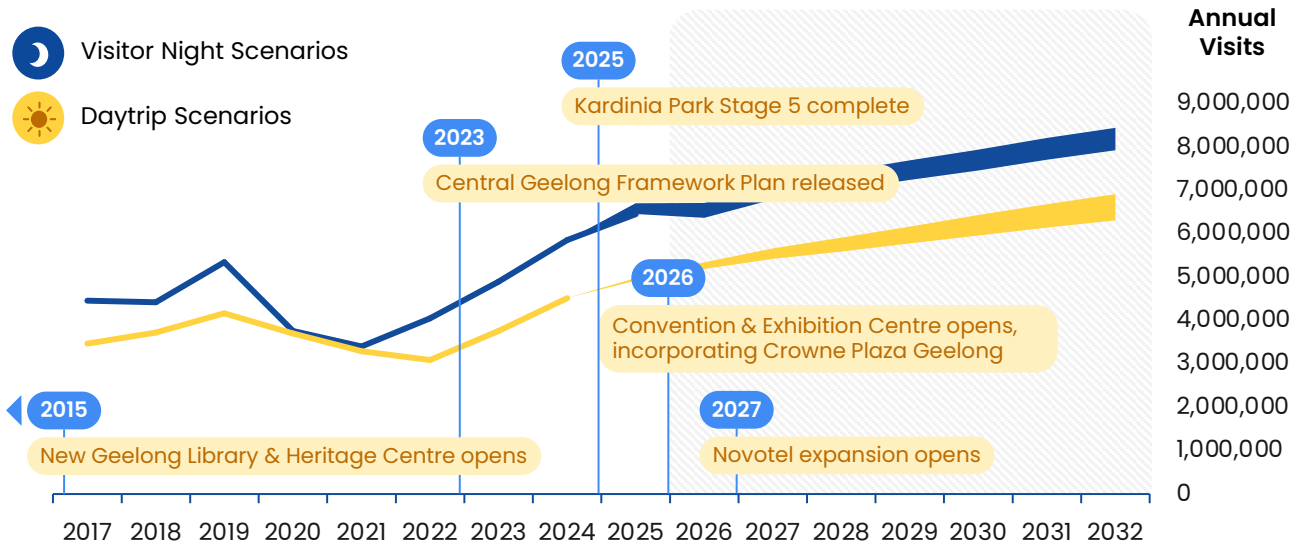
Development Activity Driving Visitor Growth

Tourism plays a major role in the region's economic landscape. In 2023–24, the industry generated $2.1 billion in direct and indirect spending in the local economy and supported 5.8% of the total labour force; around 13,500 jobs.

There is expected to be a 200% increase in visitation of both day-trippers and overnight stays out to 2032 under a baseline scenario.

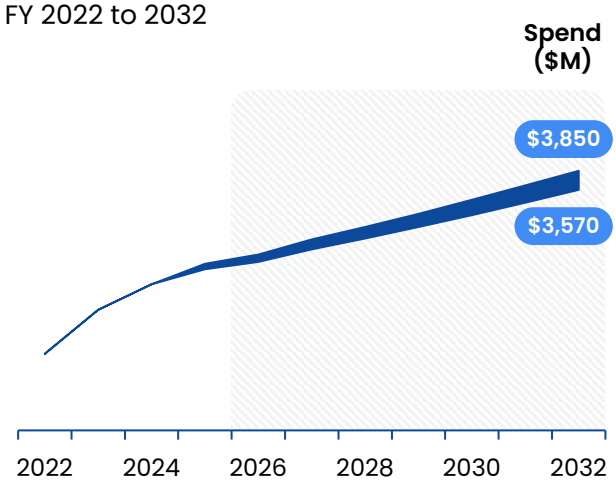
The high growth scenario assumes the region can harness the catalytic impacts of the significant investment by increasing its functionality and attractiveness, to increase by more than double. It also signals to the importance of continued accommodation delivery, particularly in Geelong Urban where many visitors spring out from.

Daytrip and Visitor Nights Projections
FY 2017 to FY 2032



Source: ABS, TRA, State Budget 2021-22, Cordell, City of Greater Geelong; Urbis

Visitor Spending Market Forecasts
FY 2022 to 2032



Source: ABS, TRA, State Budget 2021-22, Cordell, City of Greater Geelong; Urbis

Spending has grown substantially since 2022 already, with $2.1 billion in tourism consumption recorded in FY 2024 up from just over $700 million in FY 2021 and $1.2 billion in FY 2022.

As per previous findings, the average spend has increased post-COVID, with an increased proportion of it realised in services accommodation and retail.

This healthy return of spending is reassuring and helps bring confidence to the remaining outlook for the region out to 2032. Flow on impacts of spending is clearly observed in jobs growth, business expansion and Regional Product.

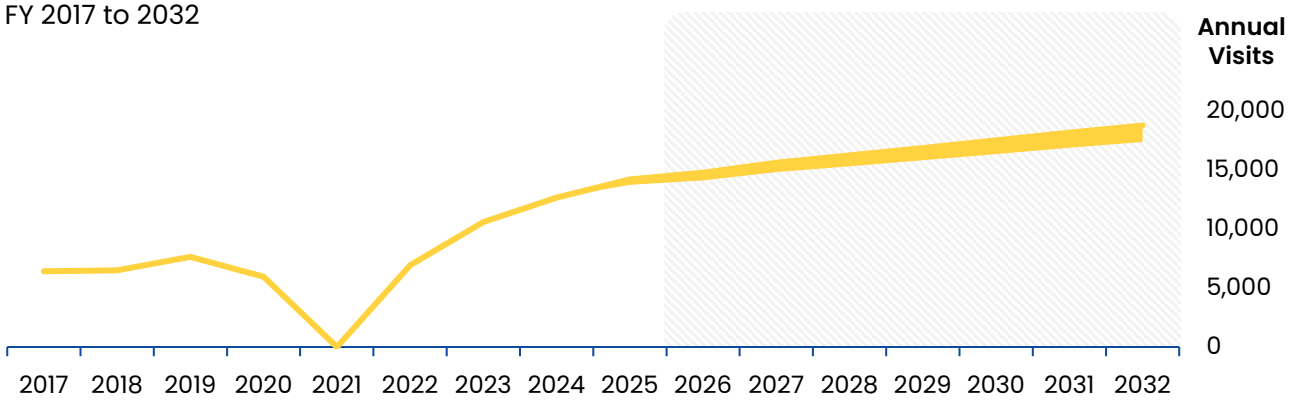
Visitor Growth Means a Larger Workforce Is Needed

Demand for Workers

Workforce demand to 2032 has been calculated using input-output modelling and data on proportional tourist spending, identifying the industries where each tourism dollar flows and the employment generated.

Since COVID-19, tourism spending has shifted away from education and towards accommodation, food, retail, and arts and culture. Accelerated by the 2023/24 rebound, this new spending mix is expected to drive employment growth moving forwards.

Forecast Jobs to Meet Future Demand
FY 2017 to 2032



Source: REMPLAN, ABS, TRA, Urbis.

Estimated Baseline Tourism Allocation – FY 2032
Allocation using modified 2019 and 2021 REMPLAN benchmarks

Accommodation & Food Services	8,340
Retail Trade	4,070
Services	1,690
Arts & Recreation Services	1,600
Transport, Postal & Warehousing	1,210
Manufacturing	300
Wholesale Trade	150
Agriculture, Forestry & Fishing	30
Total	**17,400**

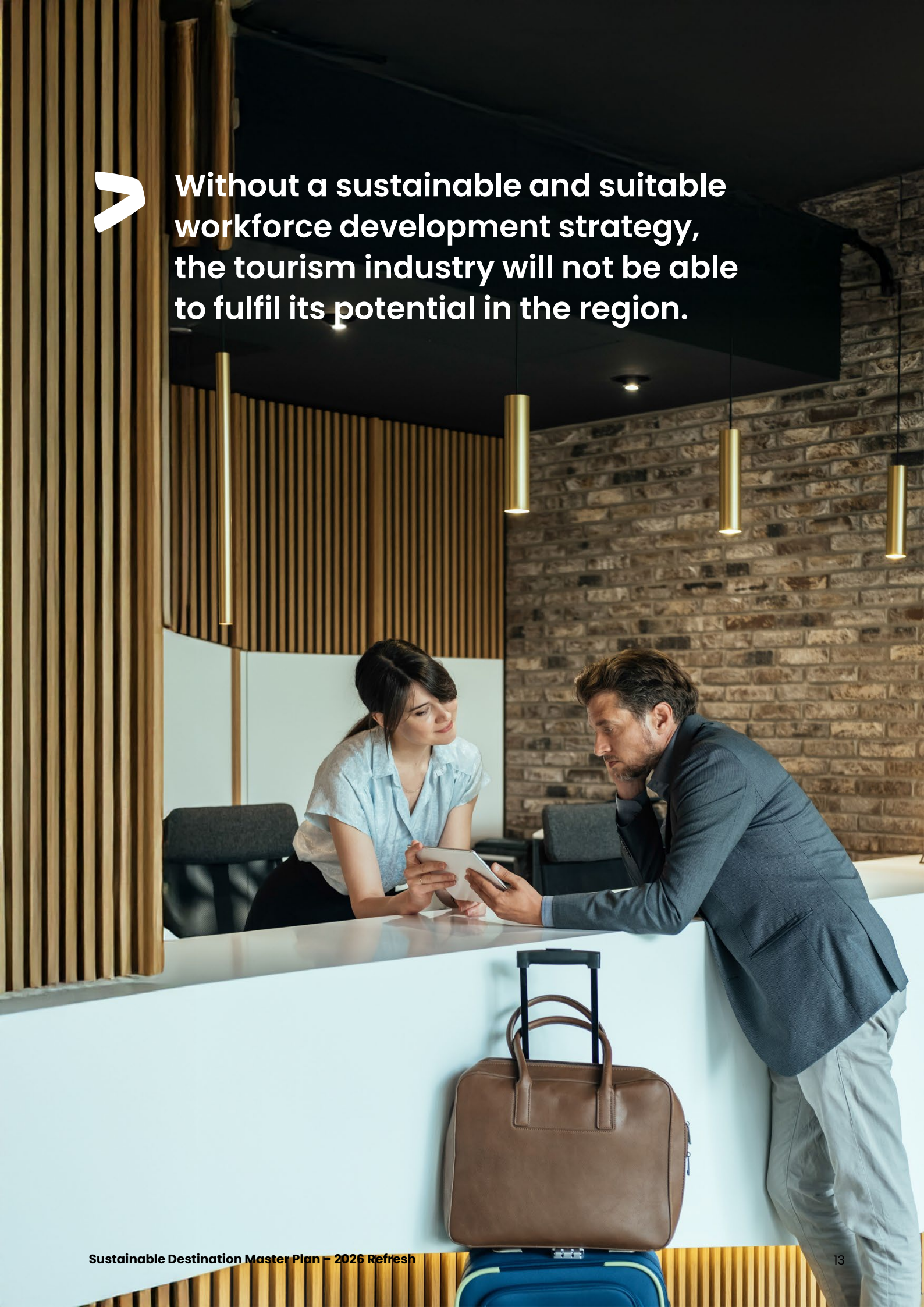
Source: REMPLAN, ABS, Victorian Government, TRA, Urbis. Rounded to nearest 10

Supply of Workers

Greater Geelong is expected to experience significant population growth over the short, medium and long term as the region becomes a popular place for young professionals and families to live and work. This will drive workforce growth across all sectors, including tourism.

Tourism related workforce is expected to be significantly higher in comparison to the previous report. Urbis now sees total tourism related employment reaching at least 17,400 in a base line scenario, buoyed by most significant expansion of accommodation, food services and retail trade employment.

Note: Growth will not be consistent across sectors and does not consider changes in unemployment or underemployment that may take place.



Without a sustainable and suitable workforce development strategy, the tourism industry will not be able to fulfil its potential in the region.

Industry Needs to 2032

Tourism in Greater Geelong and The Bellarine has already returned beyond the pre-pandemic state and is expected to continue to grow by around $1.5 billion in annual tourism spend out to 2032.

To do so, the industry will need to ensure that the demand for workers is met by the needed supply and skills.

By comparing the local labour force in the tourism industry to the demand for workers, the relative supply of workers in 2032 into tourism has been calculated.

The key outcomes of this analysis are:

- By 2032, the total tourism workforce required in the region is projected to be 17,400 under a baseline scenario and 18,800 under a high-growth scenario.
- Across most industries, this gap will require targeted workforce growth, including re-training and upskilling.

The adjacent page demonstrates the level to which each industry is anticipated to face a shortage, based on the local workforce. Notably, the key investment and growth areas of Accommodation and Food Services, Retail Trade and Arts and Recreation Services will be in shortage across the region. Even within industries that are expected to be fully supplied with workers, it is anticipated that there will be skill mismatches.

While business as usual growth is anticipated to lead to issues in the supply of workers, and hence an inability of the region to reach its full potential, the following opportunities are present over the next ten years to increase supply:

- Better improve participation in the workforce of at-risk and unemployed locals. This includes those in youth unemployment and minority groups.
- Increase the proportion of workers in each industry that want to and are supported in working in the tourism sector.
- Encourage pathways to transition for older workers or workers wishing to change careers.
- Create clear pathways and courses through secondary and tertiary education that cater to the varied industry and workforce needs.

These will not only improve tourism outcomes but have flow-on community benefits.



Skills Needs to 2032

Skills required of the workforce within Geelong and The Bellarine are not expected to be markedly different to those in demand in 2023. Concerted effort should be maintained in helping to develop the 15 most prominent skills shortages so that relevant tourism-based experiences can be served and continue to growth within the region.

Notably, across the 15 most acute skills shortages, over 50% relate to accommodation and hospitality workers. This is a result of their demand across industries, as well as the differences between local supply and workforce demand.

Many of these skills are also found within TAFE or on-the-job learning. Recent changes to the TAFE system to enable 80 free courses should create a positive impact to supporting these skills within the local labour force.

Top 15 Skills Shortages	Geelong Urban	Bellarine South	Bellarine North	Queenscliff	Avalon & You Yangs	Golden Plains South
Sales Assistants and Salespersons	●	●	●	●		
Hospitality Workers	●	●	●	●	●	●
Food Preparation Assistants	●	●	●			
Food Trades Workers	●		●		●	●
Retail Managers	●	●	●			
Accommodation and Hospitality Managers	●	●	●	●	●	●
Checkout Operators and Office Cashiers	●	●	●		●	
Automobile, Bus and Rail Drivers	●			●	●	
Sports and Fitness Workers	●	●			●	●
Freight Handlers and Shelf Fillers	●			●	●	●
Cleaners and Laundry Workers	●	●	●	●	●	●
Labourers	●			●	●	●
Sales Support Workers	●	●	●		●	
Hospitality, Retail and Service Managers	●	●	●	●	●	●
Arts Professionals	●	●		●		

Future Target Markets

Geelong and The Bellarine has enormous potential to attract visitors for a whole range of activities not yet synonymous with the region. By leveraging the investment in major projects such as the Geelong Gallery upgrade, Nyaal Banyul Geelong Convention and Event Centre and the GMHBA Stadium Stage 5 redevelopment at Kardinia Park and tapping into emerging trends, the region could open itself up to new high value visitors.



Modern travellers are more purpose driven when they choose activities and places to go. They are looking for experiences that reward them with personal growth and achievement.

In the original SDMP, we considered the six personas adjacent as an opportunity to engage experience driven and high value visitors. These visitors will leverage existing assets, future investment and the development of new product experiences, and remain relevant in the refreshed SDMP.

Each persona is seeking experiences underpinned by sustainability credentials - from experiences with a strong eco focus, green operating credentials and sensitivity to community and cultural values. To provide the tourism industry with a guide on when to activate each persona, timeframes are indicated to reflect the best time to unlock that opportunity, whether it be short (0-3 years), medium (3-5 years) or long term (5-10 years). These timeframes are based on when supporting infrastructure will be in place to support their interests.

The potential impacts of increased visitation by the different personas have been considered qualitatively, according to:

- Highest propensity to spend, i.e. high value
- Strongest potential for word-of-mouth endorsement, i.e. advocacy
- Highest potential for flow on spend to businesses that are not the core purpose of the visit.

Cultural Enthusiasts, Conference Travellers and Active Enthusiasts represent the top 3 personas, with Wellness Travellers closely following.

	High Value	Advocacy	Flow On Spend
Cultural Enthusiasts (0-3 Years)	High	Med High	Med High
Conference Travellers (3-5 Years)	High	Low	Med
Active Enthusiasts (0-3 Years)	Med High	Med	Med High
Wellness Travellers (3-10 Years)	High	High	Med High
Lifelong Learners (3-5 Years)	Med	Low	Low
Gourmet Travellers (0-3 Years)	High	High	Med High

Cultural Enthusiasts

0-3 Years

Catalytic projects including the Geelong Arts Centre and upgrades to Geelong Gallery will deliver cultural assets to the region of exceptional quality. Important Cultural and Community assets like the art, stories and practises of the Wadawurrung Traditional Owners should be front and centre.

Conference Travellers

3-5 Years

Being a conference city unlocks opportunities for businesses broadly, and not only for the Conference and Exhibition Centre and hotels. Organisers want to build local experiences into the program, and attendees are seeking inspiration to extend stays. There is much to gain if the region has destinations and activities that showcase its unique local appeal.

Active Enthusiasts

0-3 Years

The opportunity to position the region as a year-round destination for sports brings the benefits of regular visitors in all seasons and leverages the region's natural environment. Activities could include ocean swims, trail runs, triathlons, marathons, road cycling races, sailing or team sport. The local allied health sector and Deakin University's sports and allied teaching areas offer synergies.

Wellness Travellers

3-10 Years

The wellness industry is growing around the world. People embrace wellness in different ways including spas, workshops, therapies, yoga and meditation or simply visiting open green spaces for healing. There is a large audience for wellness experiences among people of all ages, and these experiences can be co-located with other attractions.

Lifelong Learners

3-5 Years

This persona is relevant to those who are looking for destinations to visit where they can combine a getaway with personal growth activities. This can be learning something new, physically challenging themselves, or developing a new interest.

Gourmet Travellers

0-3 Years

Epicurean tourism is a major visitor growth industry, particularly in scenic rural areas like the Geelong and Bellarine region. Gourmet travellers immerse themselves in gastronomic food and wine production endemic to the region. This group values authentic paddock to plate experiences, focused on sustainable agricultural production, along with high end dining and accommodation options.

A Plan For The Future

The Sustainable Destination Master Plan provides a road map to deliver on this vision and create a robust and resilient tourism economy for the next ten years and beyond, for Geelong and The Bellarine.

For Geelong, with its larger civic role, significant investment is already underway and is expected to continue in response to population growth, shifting demographics and the leveraging of major projects delivered in the past decade. On The Bellarine, there is a need to preserve and grow consciously, mindful of the local communities and unique surrounds and their ability to contribute to diverse experiences and products.

Sustainability is at the forefront of all the directions proposed and forms a key consideration in the assessment of priority projects for the region and includes:

- Protecting the natural and sensitive environments
- Preserving cultural heritage
- Encouraging development consistent with the character of each of the sub regions
- Levelling out visitation year-round
- Capturing new and emerging markets
- Being supported by a largely local workforce

The Sustainable Destination Master Plan represents an opportunity to ensure that investment projects being put forward to support growth in the region are consistently assessed against a set of criteria that delivers on the strategic directions identified.



Creating a Sustainable Destination

Four key considerations have formed the basis of the master plan – Environmental, Social, Cultural and Economic. These factors, when working together, can truly create a destination for the future. Each of these factors and their alignment to the UN Sustainable Destination Goals are detailed below.

The Environment

Preserving the diverse environments will be critical for the future.

The region is home to a range of iconic landscapes that attract visitors year-round: the Bellarine Peninsula, Barwon River Parklands, You Yangs Regional Park, rural backdrops of the Golden Plains and outstanding coastal townships are our greatest natural assets.

In line with the UN Sustainable Development Goals, considering Environment factors, the SDMP seeks to deliver on:

- Sustainable cities and communities
- Responsible consumption and production
- Climate action
- Partnerships for goals
- Life on land and below water

The Social

The region is rapidly growing with a transitioning economy toward population-driven sectors such as services, health, education, hospitality and importantly tourism.

The community plays a significant role in advancing the future of the local visitor economy and continued social engagement will be an important part of this.

In line with the UN Sustainable Development Goals, considering Social factors, the SDMP seeks to deliver on:

- Good health and well-being
- Sustainable cities and communities
- Responsible consumption and production
- Quality education

The Cultural

The Wadawurrung Traditional Owners provide the region with unique opportunities to create greater awareness including of nature-based and Cultural tourism and for these to form focus areas in the future.

Geelong is the economic and cultural hub of the region. As Australia's only UNESCO City of Design, future development outcomes should reference this criteria and importantly, this attribute should extend to and benefit The Bellarine.

In line with the UN Sustainable Development Goals, considering Cultural factors, the SDMP seeks to deliver on:

- Reduced inequalities
- Life on land

The Economic

The region is connected to visitors by road, rail, air and sea. With a growing population base and to grow the visitor economy, the pipeline of infrastructure and other investment projects are needed to take the region forward.

Investment in innovation, education and diverse accommodation, are also key aspects that will support growth in the visitor economy and derive a better future for both the community and visitors to the region.

In line with the UN Sustainable Development Goals, considering Economic factors, the SDMP seeks to deliver on:

- Quality education
- Decent work and economic growth
- Industry, innovation and infrastructure

Supporting growth to 2032

To support visitation and workforce growth to 2032, a set of strategic directions have been identified. These are supported by targeted actions.

The strategic directions were derived from the stakeholder engagement feedback, a review of global, interstate and intrastate trends, and competitive positioning of the region.

The strategic directions remain relevant in 2026. The high level of growth since the original plan makes their implementation critical. We have considered implementation progress for each action to provide a snapshot of how the region is tracking to 2032.



In the original SDMP, 39 priority projects were identified.

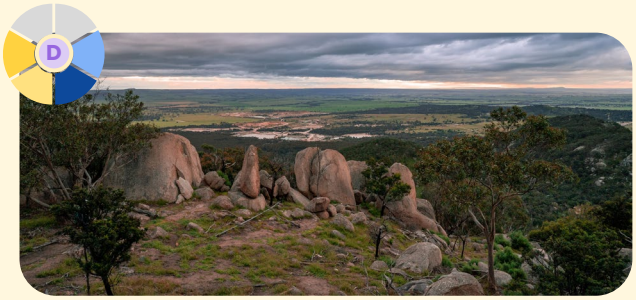
In light of the region's growth and changing priorities, the list of 39 projects has been revisited. **Twelve projects** with the most potential to drive demand were highlighted earlier in this refresh, with additional information provided in the following section.

Where these differ from the top 10 identified in the original SDMP, this reflects changing investment priorities across the region since the plan was first prepared.



Priority Projects to Drive, Amplify and Enable Visitation

While there are many infrastructure projects needed to be delivered, to capture the aspirational visitor markets and to make Geelong and The Bellarine a sustainable destination, the top priority projects are those that will drive demand in the region.



Wadawurrung Traditional Owners Cultural Experiences

Support a Wadawurrung tourism plan that promotes cultural experiences and stories.



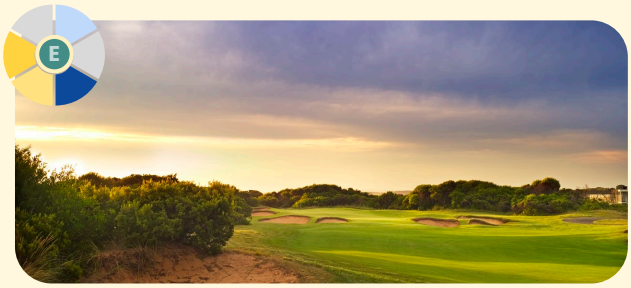
New and Sustainable Commercial Accommodation in Central Geelong

Expand the commercial accommodation offering to support growth in Central Geelong.



Kardinia Park Sports and Entertainment Precinct

Expand Kardinia Park, already the recreational heart of Geelong, to enhance local sports and entertainment.



Regional Accommodation Adjacent to Drivers such as Golf Courses and Wineries

Co-locate new accommodation with existing attractions.



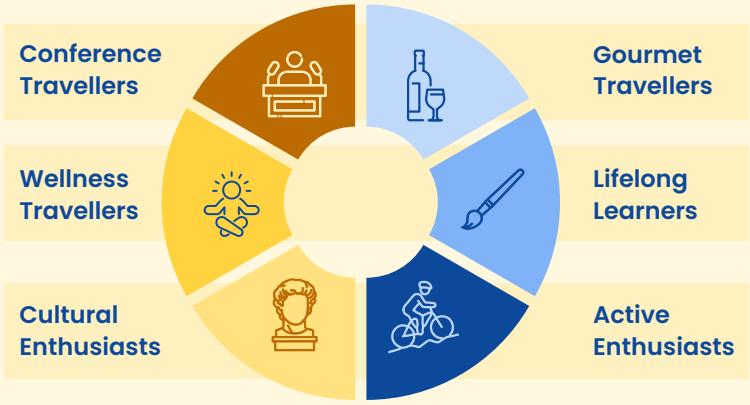
Distinct Maker and Grower Experiences

Diversify the food, wine, spirits and brewery experience, showcasing the local produce and elevating the region.



Visitor Experience at You Yangs Regional Park

Implement the You Yangs Master Plan to upgrade existing visitor facilities and meet future visitor demand.



D **Drivers:** New projects that attract visitors by providing an exciting reason to choose the destination

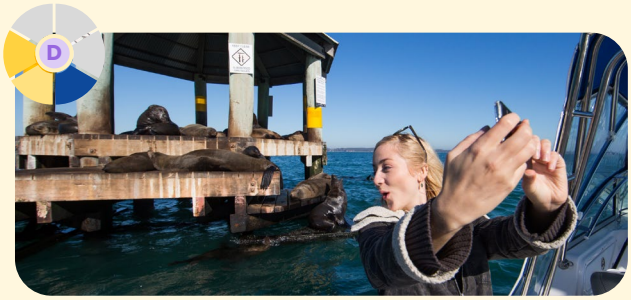
A **Amplifiers:** Projects that enhance, differentiate, and extend the visitor experience in the region.

E **Enablers:** Projects that remove barriers, increase capacity and convert interest into actual visitation.



Redevelopment of the Geelong Gallery

Redevelop the Geelong Gallery to drive cultural visitation and enhance access to the existing collections.



Queenscliff Harbour Eco-Tourism

Increase dwell time at Queenscliff Harbour by supporting an eco-tourism offer.



Experiential and Diverse Accommodation Options

Increase the mix of accommodation options that celebrate the character of the region.



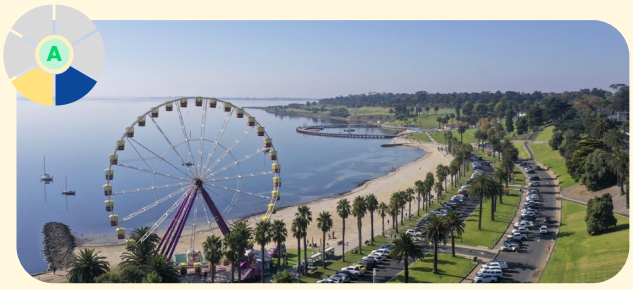
Adventure Tourism Experiences

Explore a high-adrenaline tourist attraction to draw new markets into the region.



Avalon Airport Terminal and Gateway Improvements

Improve access to Avalon Airport to enhance its role as the region's gateway to the world.



Geelong Waterfront Master Plan

Deliver the priority proposals in the Geelong Waterfront Master Plan to drive activation and catalyse investment.

Driving Visitor Growth

Improvement within the tourism sector, including through infrastructure and services upgrades, will allow the region to build and strengthen its competitive positioning, diversify and grow its target markets and ultimately reach the forecast visitor growth expected for the region. The reason for visiting the region is diverse and shaped by a range of smaller and larger destinations.

The original SDMP identified five strategic directions that support visitor growth in the region. The strategic directions remain relevant in this refreshed SDMP and continue to respond to the identified opportunities and challenges. Each strategic direction and its objective are described to the right. These strategic directions allow for the region's tourism industry to thrive and address all seven of the strategic directions identified in the Visitor Economy Master Plan Directions Paper.

These five major region-shaping strategic directions will drive changes in tourism for Geelong and The Bellarine to 2032 and beyond. While much is already underway, these focus on the actions needed to improve the capacity of tourism to both drive and leverage these changes to create better outcomes within the tourism sector. The high level of growth seen since the original SDMP means delivering these directions is critical.



1 Advance Liveability

Improve amenity and liveability across Greater Geelong and The Bellarine through revitalising urban Geelong.

2 Ignite Sport and Wellbeing

Develop a sophisticated network of accessible sports, health and wellness offerings to leverage a history of, and future with, sports and health in the region.

3 Transform Connectivity

Deliver transformational infrastructure and wayfinding initiatives to let people see more of the region.

4 Unlock Outdoor Activation

Leverage and improve the open and natural environments of Greater Geelong and The Bellarine and acknowledge Wadawurrung Country to allow more tourists and locals to engage with its natural beauty.

5 Innovation for Sustainability

Incorporate a long and celebrated history of great design and innovation to make Geelong a vibrant, accessible, forward-looking and sustainable destination of choice.

Implementing the Actions

Any action plan needs a realistic implementation plan. Each of the actions identified across the Five Strategic Directions have been assessed using a Deliver, Partner or Advocate framework, as explained below. An indicative timeframe for each has also been identified.

The outcomes of the implementation plan are an indication and are not based on financial analysis including feasibility testing which would be the next stage following the endorsement of the Sustainable Destination Master Plan.

Platform		Timeframe	
Deliver	Projects that Tourism Greater Geelong and The Bellarine would manage and deliver directly.	**Short term**	0-3 years
Partner	Projects that Tourism Greater Geelong and The Bellarine will deliver in conjunction with the Wadawurrung Traditional Owners, local and state agencies, land-owners, community groups and other relevant stakeholders.	**Medium term**	3-5 years
Advocate	Private land that can be optimised to deliver public benefit and further precinct activation.	**Long term**	5-10 years

We've undertaken an assessment of the progress of each action since the original SDMP using the following metrics.

Status	
Completed	The action has been implemented since the SDMP was initially prepared.
Progressing	The action is underway and is on track for implementation.
Limited progress	The action needs support to progress its implementation, with limited progress to date.
Not commenced	The action is not commenced and needs support to be initiated (dependent on timeframe)

Actions and Implementation

No.	Action	Deliver/ Partner	Advocate
1. Advance Liveability			
1.1	Support the objectives of the Revitalising Central Geelong Plan, Central Geelong Action Plan and Central Geelong Framework Plan	●	●
1.2	Enhance Geelong Waterfront through broader dining options and improved connection to the waterfront and arts precinct.		●
1.3	Encourage a nighttime economy through a series of events and creation of sub-precincts. Review trading hours.		●
1.4	Encourage and support outdoor activities including growth in the breadth and range of facilities and cross-generational options.		●
1.5	Support new markets through investment activity in leisure travel, product promotion and greater access to administrative services.	●	●
1.6	Encourage greater flexible space options, with required infrastructure (power, seating), and sustainability initiatives (solar power) for mini events and pop ups.	●	●
1.7	Investigate better connectivity between locals and visitors through 'live like a local' tours, citizen science and trained volunteers.	●	●
1.8	Create a walkable and accessible central city with links to key areas (i.e., arts and cultural precinct, Kardinia Park, Waterfront, retail core, Eastern Beach).		●
1.9	Encourage an improved range, scale and quality of accommodation options and seek to fast-track planning.		●
1.10	Support improved in innovative/digital wayfinding.		●
1.11	Support affordable housing options to encourage workforce retention.		●
2. Ignite Sport, Recreation and Wellness			
2.1	Grow the sphere of influence of sports pursuits through coaching and training opportunities and grow allied services.		●
2.2	Use icon sporting events to build year-round visitation by linking with the annual calendar for arts/cultural programs.	●	
2.3	Enhance key sporting infrastructure through attractive and frequent transport options, ensure seamless integration of all facilities balance competing uses, partner with accommodation and transport operators to extend the visit.		●
2.4	Grow the range of other sporting facilities such as accessible, female friendly, regional indoor and soccer.	●	●
2.5	Grow the health and wellness (both physical and mental) appeal by creating a cluster of products/packages and identifying key site opportunities.		●
2.6	Review market capacity and opportunity for mineral bathing.		●
2.7	Ensure accommodation meets different requirements and aligns with the character of each sub region.		●
2.8	Leverage the landscape through a shared network of trails.		●
2.9	Create allied health opportunities and link to University/course programs.		

Timeframe

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

Stakeholders[1]	Timing	Status
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	◔ ◑	Progressing
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, key stakeholders	◔ ◑	Progressing
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, local businesses	◔	Limited progress
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Precinct	◔	Progressing
Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia	◔	Progressing
Tourism Greater Geelong & The Bellarine, Geelong City Council, local businesses	◔	
Tourism Greater Geelong & The Bellarine, volunteer groups, local businesses	◔	Limited progress
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	◔	
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, developers	◑ ●	Limited progress
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	◔	
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, affordable accommodation providers	◔ ●	Limited progress
Tourism Greater Geelong & The Bellarine, local event organisers, schools, local business	◔	
Tourism Greater Geelong & The Bellarine, sub regional councils, sporting event organisers, arts/culture stakeholders	◔ ◑	Progressing
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Kardinia Park Trust	◔ ◑ ●	Limited progress
Tourism Greater Geelong & The Bellarine, City of Greater Geelong	◑ ●	Progressing
Tourism Greater Geelong & The Bellarine, key stakeholders, developers	◑ ●	
Tourism Greater Geelong & The Bellarine, hydrogeologist, sub regional councils	◑ ●	
Tourism Greater Geelong & The Bellarine, sub regional councils, key developers	◑ ●	Progressing
Tourism Greater Geelong & The Bellarine, sub regional councils	◑ ●	
Tourism Greater Geelong & The Bellarine, local businesses, universities, health providers	◑ ●	

Actions and Implementation

No.	Action	Deliver/ Partner	Advocate
3. Transform Access and Network Connections			
3.1	Build visitor precincts around Avalon and Spirit of Tasmania to maximise spend and encourage overnight stays. Create a positive sense of arrival and create better connections to Central Geelong and the sub regions.		●
3.2	Extend the current usage of swing mooring options for cruise ships and tendering ashore for shore-based excursions		●
3.3	Create contemporary travel options such as low carbon footprint, promote accessibility, shared pathways with signage and ensure road safety.		●
3.4	Re-visit transport needs as tourism grows to make sure transport can service the region.		●
3.5	Align transport outcomes with the G21 Transport Strategy – i.e., reduce car dependency, improve accessibility and encourage a climate neutral transport system.		●
3.6	Capture wider cross regional touring markets through marketing (e.g., GOR, Go Beyond Melbourne).	●	
4. Unlock Nature Based Tourism			
4.1	Develop a program with the Wadawurrung Traditional Owners to grow engagement.		●
4.2	Align with strategic documents such as the You Yangs Master Plan and the Wadawurrung Healthy Country Plan.		
4.3	Feature the outdoor/ natural environment to target key markets such as food and wine, those seeking remote adventure, recovery-based health and wellness products.		●
4.4	Provide diverse experiential accommodation options drawing on nature, such as glamping.		●
4.5	Engage and immerse in nature (experiential food, family friendly and inclusive parks, mini events – yoga/meditation, art classes, citizen science).	●	●
4.6	Giving back through increasing the ability of visitors to engage in flora and fauna monitoring.		●
5. Excel in Innovation & Design Focused on Sustainability			
5.1	Encourage recycling for the region through localised collection stations and the use of citizen science.	●	●
5.2	Work with the local industry to build the reputation and delivery of more contemporary sustainability through tourism.	●	●
5.3	Build leading partnerships to promote sustainability – Wadawurrung Traditional Owners, educational institutions, review existing programs.	●	●
5.4	Re-position the region to feature sustainable development principles as a core element of all work to safeguard open spaces and natural resources.	●	

Timeframe

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

Stakeholders[1]	Timing	Status
Tourism Greater Geelong & The Bellarine, Avalon Airport, Geelong Port, Spirit of Tasmania, City of Greater Geelong, State Government, G21	◔ ●	Limited progress
Tourism Greater Geelong & The Bellarine, State Government authorities	◑	Limited progress
Tourism Greater Geelong & The Bellarine, sub regional councils	◔	
Tourism Greater Geelong & The Bellarine, City of Greater Geelong, Department of Transport	◑ ●	Limited progress
Tourism Greater Geelong & The Bellarine, G21	◑ ●	
Tourism Greater Geelong & The Bellarine, Visit Victoria, Tourism Australia	◔	Progressing
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners	◔	Limited progress
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional Councils	◑	Progressing
Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders	◔ ◑	Progressing
Tourism Greater Geelong & The Bellarine, key stakeholders, local businesses, landholders	◔ ◑	Limited progress
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies,	◔	
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, sub regional councils, key environmental bodies, universities	◔	
Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies	◔	
Tourism Greater Geelong & The Bellarine, local businesses, sub regional councils	◔	
Tourism Greater Geelong & The Bellarine, sub regional councils, key stakeholders, universities, TAFE, private colleges	◔ ◑	
Tourism Greater Geelong & The Bellarine, sub regional councils, environmental bodies, Visit Victoria, Tourism Australia	◔ ●	

Note: GCC refers to Geelong City Council

Driving Workforce Growth

With the tourism workforce unable to support the expected growth in visitation to 2032 under a 'business as usual' scenario, there is impetus for action to develop the workforce in a meaningful and directed manner.

Growth since the original SDMP confirms the imperative to support significant tourism workforce growth in the region.

To achieve a sustainable workforce development strategy, consideration was given to both the size of the workforce required, and the means by which the workforce is integrated and part of the broader community.

Four strategic directions were identified in the original SDMP to maximise the workforce outcomes for the region. These remain relevant today.

Each strategic direction, its objective and the role of TGGB are described on the next page. Together, the strategic directions should see the region's tourism workforce thrive by addressing key issues of workforce shortfalls, skills needs and engaging underutilised segments of the population.



1 Retaining a Local Workforce

Support a workforce that lives, works and is a pivotal part of the local community.

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

2 Creating Careers

The Geelong and Bellarine region's tourism industry will become one where tourism is a career, not just a job.

Role in Delivery: TGGB to market, advocate and partner to demonstrate the career opportunities in tourism for all people of all ages and life stages.

3 Building Industry Skills

Creating a training and skills ecosystem that ensures all key skills needed for a thriving tourism industry are provided to employees who need it. This includes providing opportunities to employees and building the capability of employers to support career development opportunities.

Role in Delivery: TGGB to partner and advocate for renewal and innovation in training and education.

4 Industry Collaboration

Growing a network of businesses, education institutions, stakeholders and workers that collaborate across the region to maximise tourist offerings.

Role in Delivery: TGGB to facilitate discussion, collaboration and program development across the Greater Geelong and The Bellarine Region both directly and through partnerships.



Actions and Implementation

No.	Action	Deliver/ Partner	Advocate
1. Local workforce retention			
1.1	Encouraging more workers to stay and work locally by partnering with community, university and industry to encourage migrant flows and local employment.	●	●
1.2	Provide solutions to housing and accommodation such as opening university housing out of term to key workers to minimise cost-of-living pressures on workers.		●
1.3	Develop a sustainable housing pipeline for workers and community, ensuring that there are community and industry benefits to living and working in the region.		●
2. Creating careers			
2.1	Express the opportunities available in the region to engage and employ unemployed or underutilised segments of the community including unemployed youth, older residents and First Nations people.	●	●
2.2	Collate and align tourism opportunities to expectations, including demonstrating the unique value proposition of working in the industry and creating full-time, stable jobs.	●	
2.3	Support grassroots, community-based career training that integrates tourism as a valuable aspect of the community.	●	●
3. Delivering skills to support the industry			
3.1	Connecting relevant stakeholders and businesses together to ensure that cross-regional and cross-industry opportunities and needs are understood and met.	●	
3.2	Ensure relevant training and development pathways exist by engaging stakeholders, institutions and people.	●	
3.3	Catalyse and develop a diverse set of career pathways and training to support the whole industry, from specialists to entry-level opportunities and everything in between.	●	●
4. Collaborating for the best outcome			
4.1	Establish communication channels and forums to ensure regular and meaningful touchpoints are undertaken and maintained.	●	
4.2	Facilitate broader engagement and collaboration opportunities, especially for benefits that can be sourced outside-of-region and during off-season time periods.	●	●
4.3	Maintain and further develop existing goodwill between all stakeholders to allow for maturity and continuous development in the opportunities, skills and networks that tourism workers and operators can leverage.	●	●

Timeframe

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

Stakeholders[1]	Timing	Status
City of Greater Geelong, Universities, TAFE, Tourism Greater Geelong & The Bellarine, Federal government	◔	
Community groups, Tourism Greater Geelong & The Bellarine, local businesses, Geelong Chamber of Commerce, State and Federal government	◑	
Community groups, TGGB, local businesses, Geelong Chamber of Commerce, State and Federal government, affordable accommodation providers, various councils, G21, Department of Transport	●	
Tourism Greater Geelong & The Bellarine, Geelong Chamber of Commerce, Visit Victoria, Victoria Tourism Industry Council, international tourism agencies, Federal Government, Tourism Australia, international partner universities, multinational firms within Geelong	◔	Progressing
Tourism Greater Geelong & The Bellarine, Geelong Chamber of Commerce, Visit Victoria, National Skills Commission, Victoria Tourism Industry Council employment agencies, counter-seasonal tourism destination, local operators	◑	Limited progress
Universities, TAFE, Department of Education and Training, Geelong Chamber of Commerce, Visit Victoria, Tourism Greater Geelong & The Bellarine	●	Limited progress
Tourism Greater Geelong & The Bellarine, sub regional Councils, Visit Victoria, National Skills Commission, employment agencies, TRA, Universities, TAFE, youth employment providers	◔	Limited progress
Tourism Greater Geelong & The Bellarine, Universities, TAFE, Department of Education and Training, Geelong Chamber of Commerce	◑	Progressing
Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	●	
Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups	◔	Progressing
Wadawurrung Traditional Owners, Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce	◑	
Tourism Greater Geelong & The Bellarine, Wadawurrung Traditional Owners, Tourism Greater Geelong & The Bellarine, Universities, TAFE, private colleges, Department of Education and Training, Geelong Chamber of Commerce, community groups, sub regional Councils, sub regional employers	●	

Note: GCC refers to Geelong City Council

Priority Projects for the region

Demand Driving Projects

No.	Project Name	Description
1.	**Wadawurrung Traditional Owners Cultural Experiences**	Support and promote the Wadawurrung Traditional Owners to produce a Cultural tourism plan for key Cultural attractions across the region. Create opportunities to educate, create trails and providing information, share stories and showcase the natural environment in a sustainable way.
2.	**New and more sustainable commercial accommodation in Central Geelong**	Advocate for a new 5 star, internationally branded hotel, for Central Geelong to increase the luxury offer and enhance the profile of Geelong. Capture new visitors to the region including those visiting the improved arts precinct and convention centre.
3.	**Visitor experience at You Yangs Regional Park**	Support the implementation of the You Yangs Master Plan to upgrade the existing cultural and natural assets and visitor facilities at the You Yangs Regional Park to meet current and future visitor demand.
4.	**Enabling Regional Accommodation Adjacent to Existing Drivers such as Golf Courses and Wineries**	Golf is one of the region's key existing strengths, with three of Australia's top 50 public-access golf courses on the Bellarine. The Geelong region is also a significant wine district. These major attractions provide an excellent opportunity to host new regional accommodation facilities, supporting local visitation.
5.	**Experiential and Diverse Accommodation Options**	Work with accommodation providers to increase the mix of options, while ensuring they celebrate the character of the region. Through more diverse accommodation, such as, cabins, farm-stays, experiential, glamping and boutique stays, the region can capture diverse markets with flow on effects to spending more generally.
6.	**Distinct Maker and Grower Experiences**	The opportunity is to diversify the food, wine, spirits and brewery experience, elevating the region and showcasing the local produce. This can also be educational, i.e. how to craft beer, cooking courses, open farms etc. Consider building in a sustainability element such as local produce, circularity (e.g. organic food waste conversion).
7.	**Completion of the Arts and Cultural Precinct, including Geelong Gallery**	The State Government is currently redeveloping the Geelong Arts Centre and Little Malop Street area, which will create a vibrant new precinct and bolster the arts scene in the region. The Art Gallery is a critical part of this precinct.
8.	**Queenscliff Eco-Tourism**	Support initiatives to create an eco-tourism attraction at Queenscliff which increases the visitor offer and potential dwell time.
9.	**The Expanded Kardinia Park Sports and Entertainment Precinct**	Kardinia Park is already Geelong's recreational heart. The Kardinia Park Stadium Trust and City of Greater Geelong are committed to expanding the recreational offering of Kardinia Park to support an enhanced sports and entertainment offering.
10.	**Adventure Tourism Experiences**	Opportunity for a high adrenaline (e.g. aerial ropes, sky park) and diverse tourist attraction to draw new markets into the region. Includes supporting and advocating for the development of appropriate sites.
11.	**Avalon Airport Terminal and Gateway Improvements**	Improved access to Avalon Airport, including through enhancements to the freeway offramps and duplication of Beach Road, will support the airport as the region's gateway to the rest of the nation and the world.
12.	**Geelong Waterfront Master Plan**	The new Geelong Waterfront Masterplan continues to support the growth of the waterfront as a key cultural asset in Central Geelong. Delivery of the priority proposals, including Cunningham Pier, the Western Beach Maritim Precinct, and the Pavilion Site will catalyse further investment in and activation of the waterfront.

Location	Rationale	Priority Visitor Markets	Status
Across the region	Cultural heritage and the role of the Traditional Owners is important to the identity of the region and also an important draw for visitors.	Cultural Enthusiasts Lifelong	**Progressing**
Geelong Urban	Increase the luxury accommodation to appeal to a range of new visitor markets and leverage off investment into new major attractions (i.e. Arts Centre, GCEC)	Conference Travellers Gourmet Travellers Cultural Enthusiasts	**Limited progress**
Avalon & the You Yangs	Support the capacity of the Park to attract visitors and celebrate the natural and cultural assets of the region.	Cultural Enthusiasts Active Enthusiasts Wellness Travellers	**Limited progress**
Bellarine North Bellarine South Golden Plains South Queenscliff & Point Lonsdale	Existing assets provide opportunities to enhance what is already working and to support places people already visit, rather than requiring significant new investment to create new attractions.	Wellness Travellers	
Across the region	Ensure a wide diversity of accommodation options that respond to the visitor needs.	Broad visitor market All priority visitor markets	**Limited progress**
Across the region	Significant opportunity to showcase the breadth and depth of food and beverage experiences across the region.	Broad visitor market	
Geelong Urban	Arts and cultural activity is a key attractor for visitors to the region and can also support growth of the broader arts and culture activities for visitors across the region. It will also appeal to aspirational visitors markets.	Cultural Enthusiasts Conference Travellers	
Queenscliff & Point Lonsdale	Additional activities at the Harbour will increase visitation and dwell time.	Broad visitor market Cultural Enthusiasts Active Enthusiasts	
Geelong Urban	The expanded Kardinia Park precinct will cater to growing demand for high-quality sports and entertainment facilities.	Cultural Enthusiasts Active Enthusiasts	
Across the region	High adrenaline and adventure attractions are popular visitor facilities and also increase draw of the family visitor market.	Active Enthusiasts	
Avalon & the You Yangs	Avalon is rapidly expanding with international flights recently reintroduced. Improving the arrival experience will make Avalon a more attractive way to enter the precinct.	Broad visitor market	**Progressing**
Geelong Urban	The Geelong Waterfront is a major attraction with mass appeal. Implementing the master plan will revitalise this important existing asset.	Broad visitor market	**Progressing**

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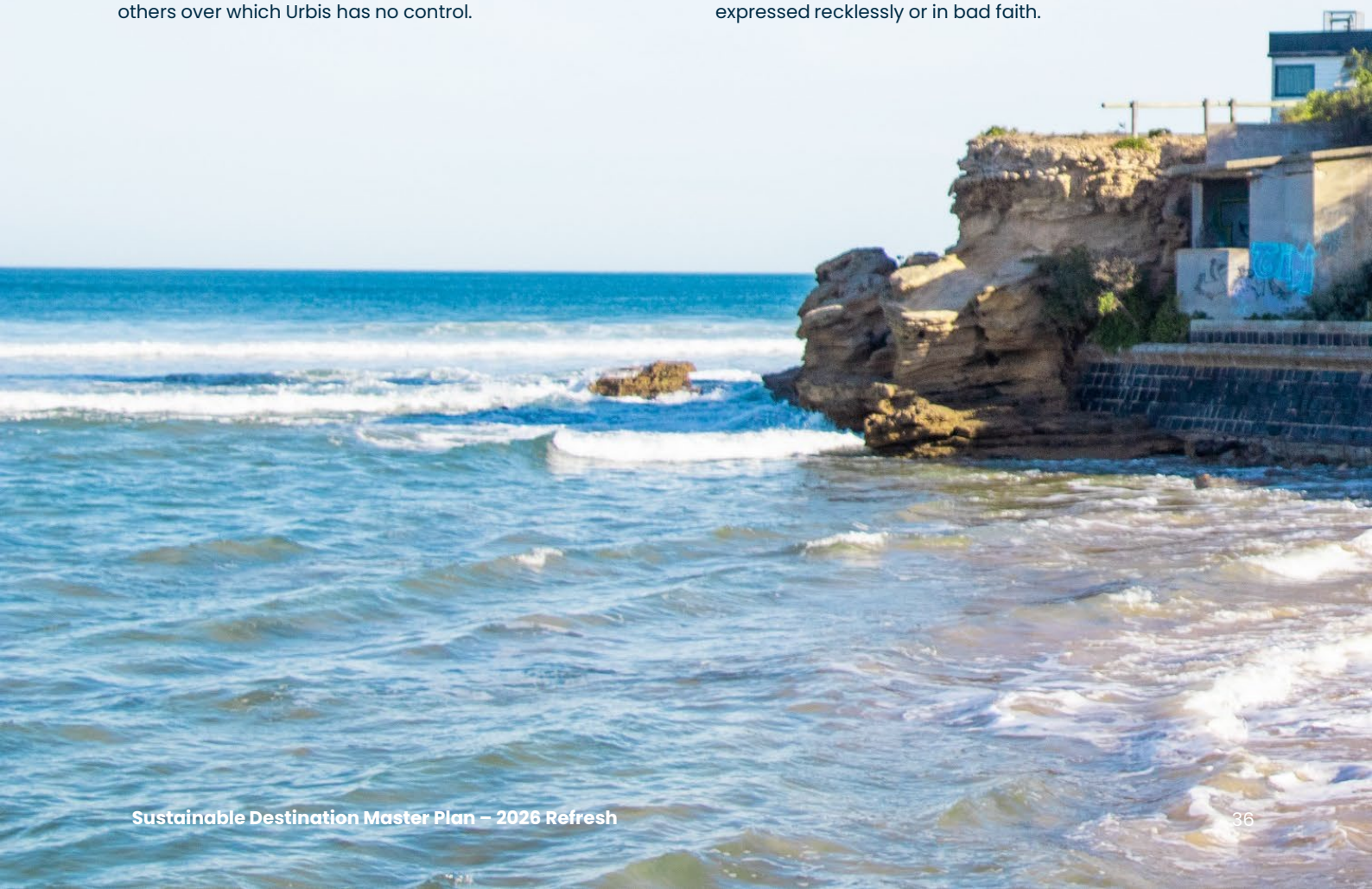

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Appendix

Tourist Demand and Supply Analysis



Tourist Demand and Supply of Accommodation or Workers Summary
All Figures are Forecast and Rounded

Demand, Medium Scenario

Year to	Jun-22	Jun-23	Jun-24	Jun-25	Jun-26	Jun-27	Jun-28	Jun-29	Jun-30	Jun-31	Jun-32
						Visitors (000)					
Daytrippers	3,090	3,760	4,520	4,700	4,930	5,140	5,330	5,520	5,720	5,910	6,100
Domestic Overnight[1]	1,230	1,630	1,810	1,930	1,970	2,030	2,080	2,130	2,190	2,240	2,300
International Overnight	20	50	70	70	70	70	80	80	80	90	90
Total Visitors	**4,340**	**5,440**	**6,400**	**6,700**	**6,970**	**7,240**	**7,490**	**7,730**	**7,990**	**8,240**	**8,490**
						Visitor Visitor Nights (000)					
Domestic Overnight[1]	3,490	4,070	4,560	5,300	5,420	5,650	5,810	5,990	6,170	6,350	6,500
International Overnight	560	820	1,290	1,310	1,150	1,370	1,440	1,510	1,570	1,650	1,720
Total Visitor Visitor Nights	**4,050**	**4,890**	**5,850**	**6,610**	**6,570**	**7,020**	**7,250**	**7,500**	**7,740**	**8,000**	**8,220**
Daytrips + Visitor Nights	**7,140**	**8,650**	**10,370**	**11,310**	**11,500**	**12,160**	**12,580**	**13,020**	**13,460**	**13,910**	**14,320**
						Visitor Spend ($M)					
Daytrippers	$480	$710	$860	$910	$970	$1,040	$1,110	$1,180	$1,260	$1,340	$1,420
Domestic Overnight	$590	$970	$1,180	$1,400	$1,460	$1,570	$1,660	$1,750	$1,850	$1,960	$2,060
International Overnight	$70	$110	$130	$140	$130	$160	$170	$190	$200	$220	$240
Total Visitor Spend	**$1,140**	**$1,790**	**$2,170**	**$2,450**	**$2,560**	**$2,770**	**$2,940**	**$3,120**	**$3,310**	**$3,520**	**$3,720**

[1] Due to the variability of the domestic overnight data, a 3 year rolling average has been used historically.

Supply

Year to	Jun-22	Jun-23	Jun-24	Jun-25	Jun-26	Jun-27	Jun-28	Jun-29	Jun-30	Jun-31	Jun-32
						Visitors (000)					
Beds[2]	5,360	5,650	5,800	5,810	6,020	6,540	6,640	6,640	6,970	7,200	7,200
Workforce	6,940	10,600	12,660	14,000	14,480	15,260	15,810	16,390	16,970	17,570	18,120

[2] Stock that heavily seasonal such as campsites and unserviced private rentals have had occupancy percentages applied to them.

