

11 June 2021

By email: [visitoreconomy@austrade.gov.au](mailto:visitoreconomy@austrade.gov.au)

Reimagining the Visitor Economy Expert Panel  
Australian Trade and Investment Commission (Austrade)

Dear Panel

**Reimagining the Visitor Economy - Stakeholder Consultation**

Western Melbourne Tourism is grateful for the opportunity to have input into your review of the future of Australia's visitor economy.

Western Melbourne Tourism Inc (WMT) is an association incorporated for the purposes of promoting and developing the tourism sector across Melbourne's western metropolitan region. WMT operates on a membership model primarily funded by the cities of Hobsons Bay, Wyndham, Maribyrnong, Moonee Valley, Brimbank, and Melton. It is overseen by an independent board with representation from these six western metropolitan councils, as well as Parks Victoria and Victoria University and representatives from the region's tourism industry.

The overall impacts of the Covid pandemic on the visitor economy of the Melbourne west region are substantial and run very deep. There have been different layers of government support flowing to the region; however, more intervention and direct support is urgently required, and this will be needed for some years.

Western Melbourne Tourism's submission is attached. This forms an edited version of our submission made in April to the Victorian Government's Legislative Council Standing Committee Inquiry into the impact of the COVID-19 pandemic on the tourism and events sectors.

If you would like to contact me to elaborate further on this submission, I am available on 0417 545 141 or email [richard@melbourneswest.com.au](mailto:richard@melbourneswest.com.au).

The opportunity to have this input is much appreciated. We look forward to receiving further information as your review progresses.

Yours sincerely



**Richard Ponsford**  
Executive Officer  
Western Melbourne Tourism Inc



**Scott Chapman**  
Chair  
Western Melbourne Tourism Inc

## Reimagining the Visitor Economy

Submission by Western Melbourne Tourism Inc

11 June 2021

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### Summary

The overall impacts of the Covid pandemic on the visitor economy of the Melbourne's west region are substantial and run very deep. There have been different layers of government support flowing to the region; however, more intervention and direct support is urgently required, and this will be needed for some years.

The visitor economy of Melbourne's west has a highly disadvantageous and overwhelming reliance on international and interstate visitation, given Government mandated regulatory impacts on these forms of visitation. Pre-Covid, an estimated 69 per cent of all visitor spending in the Melbourne west region was from either international (48%) or interstate (21%) visitors. This implies that the Melbourne west region faces the second highest percentage fall in Victorian regional visitor spending due to Covid, after only the City of Melbourne.

Compounding the economic problems of Melbourne's west from the declines in visitor economy jobs are the many displaced visitor economy workers in the City of Melbourne residing in the Melbourne west region. These visitor economy workers will have reduced incomes and will also spend less in their home Melbourne's west economies.

### Recommended areas of Government support

The following suggested urgent areas of focus for further government action and support are further detailed in this submission:

1. **Governance of the visitor economy** - *Strengthen support and strategic oversight of Greater Melbourne*
2. **Marketing support** - *Broaden the marketing footprint and bring more focus back to our cities and the local neighbourhoods and precincts within.*
3. **Infrastructure funding** - *Fast track investment in Melbourne's west visitor attractors*
4. **Skills and industry workforce development** - *Help redress significant skill shortages and provide support to rebuild the capacity of local businesses*
5. **Events sector support** - *Provide direct financial relief and subsidy support*
6. **International Students** - *Facilitate the return of students with a strong sense of welcome*
7. **Direct financial support** - *Contributions and financial incentives such as travel vouchers, should be applied equally to both Greater Melbourne and Regional Victoria*

## **Introduction**

Western Melbourne Tourism Inc (WMT) is an association incorporated for the purposes of promoting and developing the tourism sector across Melbourne's western metropolitan region. WMT operates on a membership model primarily funded by the cities of Hobsons Bay, Wyndham, Maribyrnong, Moonee Valley, Brimbank, and Melton. It is overseen by an independent board with representation from these six western metropolitan councils, as well as Parks Victoria and Victoria University and representatives from the region's tourism industry.

Our organisation offers a partnership between Councils, universities, tourism operators and local businesses with a dedicated focus on the visitor economy. We endeavour to work proactively with industry bodies including the Victoria Tourism Industry Council (VTIC), Visit Victoria (VV), and the Committee for Melbourne (CfM) to build awareness around the opportunities in the visitor economy and advocate the needs of our region.

## **Melbourne's west visitor economy - Pre Covid**

Prior to the Covid 19 pandemic, the region received over four million visitors each year (TRA, YE Dec2018). At this time research was showing Melbourne's West was expected to be the fastest growing tourism sub-region in metropolitan Melbourne over the next decade (AEC Group, 2018).

There was significant strength and growth of the Melbourne west visitor economy immediately prior to the Covid pandemic, with a growth rate of approximately 12% per annum between 2016-2019 and a GRP of around \$1.69 billion (2018 Satellite Accounts). The share of jobs (approx. 13,500 direct and indirect jobs) represents around 4.5% of jobs for the region; seemingly a lower figure than many regional areas, but it is within a region with the greater industrial diversification than areas beyond Melbourne. The equivalent figure for share of jobs for Greater Melbourne overall is 5.6%.

Around two-thirds of Victoria's total visitor economy occurred in the Greater Melbourne Region.

With more than 30 million visitors each year, Melbourne is the major gateway to the state. Approximately half (or 15 million) the visitors to Melbourne have been dispersed beyond the inner city across the Greater Melbourne region (AEC Group 2018).

Melbourne's west, as a tourism subregion of Melbourne, has provided an economic contribution which is easily the equivalent of the most prominent tourism regions outside of Melbourne - at similar levels to Geelong and Bellarine, Gippsland and Goldfields.

There are substantial developments in the pipeline including the Melbourne Airport Rail Link (and Sunshine Interchange) as well as the development of Avalon Airport as a second international air terminal. The development of the Werribee Open Range Zoo Masterplan will accelerate now with a full commitment of government funding.

This is a range of other significant developments ahead including the new Western United A-League soccer Stadium at Tarneit, a major leisure precinct development at Moonee Valley Racecourse, ongoing expansion at Essendon Fields, renovation and redevelopment of Seaworks on the Williamstown waterfront, a new National Equestrian Centre Facility masterplan in the Werribee Tourism precinct, as well as the proposed new Museum of the Future at Scienceworks in Spotswood.

There is also an expanding supply of hotel accommodation. Hotels recently opened (or close to opening) include the Hyatt Place hotel at Essendon Fields, Sebel Moonee Ponds, Holiday Inn at Werribee, Punt Hill Apartments at Caroline Springs and Quest Flemington Central. Brimbank Council

advises there are five further new hotels with planning approval, four located in Sunshine and one in Sydenham. A new 66 room hotel at Mt Atkinson also has planning approval from Melton City Council.

Melbourne's west has a thriving arts and cultural scene and a burgeoning food and hospitality culture, including the recently launched Grazeland precinct at Spotswood. The region has an enormous range of nature-based attractions, particularly those found along the west bay coastline and up the Maribyrnong River valley. Significant cycling trail infrastructure will be developed as part of the Westgate Tunnel project and this will provide further new connectivity to explore the region by bike.

**The general outlook on the economic value of the visitor economy pre-Covid was incredibly positive. We need to ensure as many businesses as possible make it through to the other side of the pandemic so this economic growth story can continue.**

### **Covid impacts on the visitor economy of Melbourne's west – an overview**

*To gain an understanding of about the extent of the impacts on the visitor economy of our region, WMT has engaged a specialist tourism economist, Karl Flowers from Decisive Consulting, to provide advice at different points through the duration of the pandemic (Karl was previously employed as the Chief Economist with Tourism Australia and prior to this as the Director Investment in the Commonwealth Department of Tourism).*

Melbourne's west visitor economy is generally underestimated. It is a different visitor economy to all other areas of Victoria and central Melbourne, less reliant on traditional holiday visitation. Given its highly multicultural population, it relies more on visiting friends and relatives (often long staying/ high yielding). As compared with other destinations, day visitors to local attractions, domestic business and international students are more strongly represented in the visitor profile. 69% of visitor spend is sourced from either international or interstate visitors (Decisive Consulting, April 2021). The distribution of this spending across the different LGA's in the region is included in a table in *Attachment 1* )

As such, the following factors have brought on a concentrated impact of the Covid pandemic on the region:

- loss of international travel
- loss of business travel (and the trend towards online meetings)
- loss of major events and business events
- loss of international students
- loss of confidence for interstate travel (owing to the 'traffic light' system)

Layered on this, businesses have been required to sustain themselves through an enormously challenging environment – stop/ start lockdowns, last minute cancellations of events, state border closures, changing rules around mask wearing, number limits and managing covid protocols and social distance, managing cancellations – all of which have been well documented in the media. Businesses are faced with a substantial loss of confidence for travel in the general community, limited forward bookings, with no capacity to plan with any certainty. None the least, has been the impacts on mental health and wellbeing of people working in the sector.

Business owners have endured a sustained period of reduced incomes. And now, without the support of JobKeeper and banks calling in deferred loan payments, there is increasing financial pressure. This is like 'a second whammy', that will lead to the loss of jobs and the inevitable collapse of more businesses.

### ***Accommodation occupancy***

Accommodation occupancy rates across Melbourne’s west, and Greater Melbourne more broadly, are perilously low, particularly those businesses reliant on international travel.

A table of the market performance of Melbourne hotels for the 4 weeks of February 2021 compared with the same weeks in February 2020 and February 2019 is included in Attachment 1. (Data provided by the Accommodation Association of Australia (AAA). It shows general occupancy of around 30-40% in 2021 compared to 70-90% for the equivalent weeks in the previous years. The AAA was reporting occupancy levels across Melbourne of still around 20- 40% for Easter 2021.

Melbourne’s west is generally undersupplied with accommodation stock; pre Covid, occupancy levels of 90% and higher were the norm.

To some degree occupancy is currently being offset with accommodation filled through other markets eg infrastructure developments occurring in the region, or through the quarantine program. Quest Apartments, one of main suppliers of room nights across the region, reports that to be able to sustain profitable income sources for the long term, there is an urgent requirement for the return of the international students, the return of business and leisure events and a unified state system that creates a level of confidence for the domestic corporate traveller to not be forced into hotel quarantine programs upon returning to their state. Whilst the current occupancy levels are being driven by the current domestic corporate movements, they are not a level to deliver sustainable and profitable growth for the long term.

Occupancy levels so far in 2021 in Melbourne contrast significantly with those in regional Victoria, which is now experiencing some of its highest demand ever. Room rates in Melbourne are being reduced, while rates in regional Victoria are inflated owing to the growing demand. This adds further financial pressure on Melbourne-based operators.

### ***Predicted job losses in the visitor economy of Melbourne’s west***

Predictions by Decisive Consulting made in June 2020 forecast for 2020/21 and 2022/23 are shown below (compared to 2019 for visitor economy direct spending and total jobs due to this spending for Melbourne’s west region)

<b>Prediction Year</b>	<b>2020/21</b>		<b>2022/23</b>	
	<b>Fast</b>	<b>Slow</b>	<b>Fast</b>	<b>Slow</b>
<b>Alternative scenario for recovery</b>				
Melbourne’s West visitor economy direct tourism spending (after inflation) and visitor economy total jobs	<b>-40%</b>	<b>-51%</b>	<b>6%</b>	<b>-4%</b>

- Under the two scenarios in Melbourne’s West **5,855 or 7,609 total jobs are predicted to be lost (from a total of approx 13,500 jobs)** due to falls in visitor economy spending in 2020/21 compared to 2019.
- Even a further two years later in 2022/23 total jobs due to visitor economy spending in the region is expected to be 834 more or 565 jobs less compared to 2019 under the two scenarios.

(A table showing the breakdown of these job losses by LGA’s cross the region is included as part of *Attachment 1*)

The June 2020 optimistic or pessimistic scenarios depended on factors related to the depth of the Australian economic downturn, fears of infections and levels of infection rates, timing on the

availability of a vaccine, and the timing of reopening of international borders (timing of this was assumed in June 2020 to be either April 2021 or January 2022).

Based on the worsening visitor economy outlook for the period to the end of 2021/22 now than in June 2020 the more 'pessimistic' scenario is now the base case due to:

- the state traffic light system having reduced confidence and discouraged interstate travel. It has made intrastate travel (which is much less important to the Melbourne's west region) more attractive;
- the conclusion of JobKeeper in March 2021 is accelerating tourism business bankruptcies;
- the Federal "tourism recovery" package encouraging travel to other parts of regional Australia (Queensland Coastal and Northern Tasmania in particular) drawing potential visitors away from Melbourne and making the worst Covid-affected Australian regional economies weaker; and
- the vaccine rollout in Australia, Europe and Asia is much slower than expected – so there is now an even longer wait for international borders to open.

### **Recommended areas of government support**

The following sets out some suggested areas of focus for further government action and support:

1. **Governance of the visitor economy** - *Strengthen support and strategic oversight of Greater Melbourne*
2. **Marketing support** - *Broaden the Melbourne marketing footprint and bring more focus back to our cities and the local neighbourhoods and precincts within*
3. **Infrastructure funding** - *Fast track investment in Melbourne's west visitor attractors*
4. **Skills and industry workforce development** - *Help redress significant skill shortages and provide support to rebuild the capacity of local businesses*
5. **Events sector support** - *Provide direct financial relief and subsidy support*
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#### **1. Governance reform required for the visitor economy - Strengthen support and strategic oversight of Greater Melbourne**

The Greater Melbourne region never formed part of the Victorian Government's Regional Tourism Review and is generally not embraced in the government's tourism 'architecture'. Without an organisation like the previous Destination Melbourne, there is no industry-based entity to formally represent or help coordinate the interests of the State's largest regional visitor economy. **Our region, as part of Greater Melbourne, is significantly disadvantaged by not having any formalised and adequately resourced Regional Tourism Board (RTB) structure.**

For other parts of Victoria, the RTB structure provides an important conduit for industry and local business to have access to the programs and funding to support recovery. Without any structure in place Melbourne's west (and Greater Melbourne as a whole) the local tourism sector is greatly disadvantaged.

On relatively limited resources, WMT has operated to fill what is a perceived gap in the structural management of tourism to provide profile and advocacy support for the visitor economy in our metropolitan sub-region.

Through the Covid period there has been some new-found connection, positive collaboration momentum in building a reformed framework of support and clearer pathways in working with government.

The Victoria Tourism Industry Council (VTIC) has convened a valued Greater Melbourne Recovery forum of which WMT is a part. This is a positive step, but this is not strongly resourced. It is a minimal structure compared with the resources devoted to organisational structures for the strategic oversight of tourism beyond Melbourne.

As an outcome of the Regional Tourism Review it is understood the government is currently moving towards the implementation of a series of Visitor Economy Partnerships (VEP's) for tourism regions. Greater Melbourne is being left behind in this process of reform. What is the equivalent of the VEP for Greater Melbourne?

**Greater Melbourne needs to be managed alongside regional Victoria and an equivalent framework model is required.**

## ***2. Marketing Support – embrace cities more actively as destinations and expand the Melbourne footprint of mainstream marketing campaigns and digital content***

There is a major imperative to restore confidence and let consumers know that Greater Melbourne is open for business again. There are considerable efforts to be undertaken to promote Melbourne, including ongoing Visit Victoria intrastate and interstate campaigns, 'Click for Vic' program, Lets Melbourne Again and the Melbourne City Council FOMO campaign.

These campaigns are all very welcome steps but need to be underpinned by a broader base of tactical activation. With the limits on spheres of travel, the period of the pandemic has shown us the value of 'local' and our neighbourhoods. Local neighbourhoods of Melbourne are a key element and 'personality' of the Melbourne visitor experience. It has been encouraging to see Visit Victoria embrace some neighbourhoods beyond the CBD in the most recent 'Visit Melbourne' campaigns. With an increased reliance on local domestic markets this concept of neighbourhood marketing can be expanded. We would like to see Tourism Australia more actively embrace Australian cities in its marketing campaigns.

**To support recovery there is a strong need to drive bookings and spending more broadly across Greater Melbourne. Visit Victoria promotes a very narrow footprint of Melbourne. Neighbourhood destinations need to be better acknowledged as such, as part of the mainstream tourism framework and reflected in the digital content.**

## ***3. Infrastructure - Fast tracking investment in key infrastructure development***

A key component for fast tracking recovery is through investment in key infrastructure.

The region is grateful for the share of visitor economy recovery funding already committed by the Victorian Government including the commitment to progress and build the Melbourne Airport Rail Link (with Federal funding as well), the development of the Werribee Open Range Zoo masterplan, the contribution towards the redevelopment of the Whitten Oval, Footscray and upgrades of visitor facilities at Brimbank Park and Organ Pipes State Park.

Beyond these projects, there is a list of further shovel ready projects, or projects well advanced in planning across the region, all offering substantial jobs and growth to the region's visitor economy:

- Museum Victoria's *Museum of the Future* at Scienceworks at Spotswood

- A new National Equestrian Centre masterplan development (Equestrian Victoria) at Werribee Park
- [Vietnamese Museum Australia](#) located in Footscray
- Phase 2 works at Seaworks at the Williamstown foreshore

**The Melbourne Airport Rail Link and Sunshine Hub Interchange is a game changing project for the region. We must maintain a sense of urgency in bringing this project forward.** The project will transform Sunshine not just as a super hub, but also as key destination for regional, interstate and international visitors.

Further, with the growth areas of Wyndham and Melton contributing 1 million residents by 2051, investment in the infrastructure commitment of the Western Rail Plan is also vital. The electrification of the Melton and Wyndham lines provides important connectivity to the CBD and regional centres.

The key road networks that connect to the regions are also important and the upgrade of the Western Highway within the City of Melton, the gateway to Ballarat and interstate, needs State and Federal funding support. This section of the freeway is gridlocked during the peak tourism seasons as tourists travel in and out of the city to key regional centres.

#### ***4a. Addressing Skill shortages***

Skills gaps and labour shortages have been a persistent issue for the growth and development of the tourism industry, not only in Victoria and nationally, but internationally. This is in part due to the diversity of tourism businesses, the predominantly SME composition of the sector, but also the seasonal nature of many tourism businesses and the difficulty of sustaining workforces in the context of fluctuating demand. Across Victoria, the problem has been chronic.

In 2019, it was forecast that that a further 100,000 workers would be required in addition to the 263,000 employed by the industry if the rates of approximately 7% growth in visitor spending was to continue. As travel restrictions are eased within Australia, labour shortages have reappeared in the absence of temporary visa holders (primarily backpackers and international students) and unpredictable demand for services and experiences. This is particularly being felt in Melbourne's west where there has been strong reliance on temporary visa holders to occupy casual and/or seasonal positions. As we enter the post-covid period, the sector's capacity to generate employment will be critical to Victoria's overall economic recovery process and it is timely to review persistent workforce issues as we plan for recovery and lay the foundations for sustainable industry development.

**Over recent years, there have been several regional workforce reviews undertaken in Victoria's regions including the Mornington Peninsula and the Ballarat/Grampians region. In the interests of recovery, we suggest a similar review to be undertaken in Melbourne's west.** (The aim of the review should be to gain a greater understanding of the current and future skills requirements of the industry, the barriers to problems that create skills and labour shortages and propose effective solutions to ensure that the industry attracts, builds and retains the workforce required to grow, as well as to provide quality employment and career paths)

#### ***4b. Building back the capacity of the visitor sector***

The industry is also highly dynamic with new skills requirements emerging with change. For example, the need for high level digital capability is now essential for all tourism, hospitality and events operations.

As identified by industry consultations, the level of digital capability in the sector is relatively low and there are barriers to access and participation in relevant training that would upskill SME operators and



managers. Similarly, the pandemic has also shown in sharp relief the need for business capacity to innovate, adapt business models and manage risk. At the same time, due to major downturns in revenue in the sector, barriers to skill development are increased. There is a clear need to review capability gaps, customise training solutions, and deliver industry relevant training and development programs that are affordable, accessible and effective.

This is particularly the case in Melbourne's west where a rapidly changing population base, changing transport and services infrastructure, changing consumer preferences and visitor characteristics, will generate both challenges and opportunities. Strengthening industry capabilities will be critical to maximising the opportunities for growth and employment creation. **As above, a review of skills and capability shortages is required accompanied by the delivery of customised training and development programs that are accessible, affordable and effective.**

#### ***5. Event sector support – provide direct financial relief and subsidy support***

Melbourne's west traditionally has a very full event calendar and events have been a major driver of visitation to the region. As a subsector of tourism, the events sector has been particularly harshly impacted. We would encourage:

- Further direct government relief and survival support, particularly through the many businesses in the event supply chain, and recognising the high proportion of short-term contractors, as well as long lead time in reloading and then planning and delivering events into the future. (Any such support is required in a timely way as many events across broader Melbourne were cancelled / postponed due to delays in approval and funding).
- Careful calendar management to ensure that, as events comeback on-line, these are developed and programmed to avoid conflicts and maximise visitation across the year. This can be achieved through strategic oversight across Greater Melbourne (which is not in place at the moment)

**We also believe there are opportunities for government to provide support to leverage the branding of the major events and expand the geographic base beyond the CBD into Greater Melbourne.**

#### ***6. International Students – Facilitate the return of students with a strong sense of welcome***

A large cohort of international students live across Melbourne's west. Some students are studying at Victoria University campuses based in the region, but others are attending other Melbourne universities.

International Students are major contributors to the Melbourne and Victorian economy and bring skills and investment to our city. From the perspective of the visitor economy a large share of the economic contribution is from students and their families spending on housing, food, transport and tourism.

The timely return of students needs priority and all practical initiatives possible must be made to facilitate quarantine and processing students so they can be back on campus in face-to-face classes as quickly as possible. The proposal to establish a quarantine centre at Avalon Airport has particular merit for its proximity to Melbourne's west.

Our experience through the pandemic is that all international students, whether still residing in Melbourne or not, have become considerably disengaged. We would like to see programs that:

- Welcome students back to Melbourne and Victoria and help build new /re-establish local connections and sense of belonging. We need to be working at re-building the experience to

ensure this is even more positive for the students and support the recovery of Melbourne's international education brand;

- Educate the community on the economic value of international education to the community to further promote a sense of welcome.

With support of funding from the Victorian Government under the Study Melbourne International Student Welfare Program WMT has developed a program in partnership with Victoria University entitled [Hangin' Local](#).

The program is designed to get international students at Victoria University out and about exploring their local neighbourhoods, making new friends and feeling more at home in Melbourne's west. This collaborative project broadened participants' knowledge of local attractions across Melbourne's west, in turn helping to generate student VFR travel within the region. The project was interrupted by Covid but we believe with continued funding can help add value to the study experience and sense of welcome and social connection for further new cohorts of international students.

### **7. Direct Financial Support**

**If financial incentives for travel are being offered, for example with programs such a vouchers, Melbourne and Greater Melbourne needs to be included.** Direct support like this has flowed more readily to regional Victoria where recovery has already made good progress. Regional Victoria was the beneficiary of four rounds of regional vouchers, while there has only been a single round for Greater Melbourne. Greater Melbourne needs to be prioritized for any future programs.

The principle of the Federal Government offering discount fares is welcomed and we are hopeful the Victorian government can advocate to ensure there are half price flights into Avalon Airport. This affords a strong opportunity to boost yield and dispersal in our region, drawing visitors back to Greater Melbourne as opposed to other parts of regional Australia.

### **Conclusion**

**Many of the accepted assumptions about Melbourne and Victoria's visitor economy have changed because of the Covid pandemic. Melbourne as an engine room gateway driving visitation is now much weakened. Job losses are already substantial and rapidly growing with the end of JobKeeper. With Victoria being much the worst affected State visitor economy urgent further action by State and Federal Government is required.**

**It is a gap that there is no current overarching tourism strategy for Melbourne and Victoria.**

**Now is the perfect opportunity for timely review and assessment in the light of the pandemic impacts, and a new visitor economy landscape with new market assumptions. The narrative for this plan cannot just be about the CBD or Regional Victoria. Greater Melbourne (including Melbourne's west) must be emphasised as well.**

**Further contact for this submission**

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**Attachments:**

Attachment 1

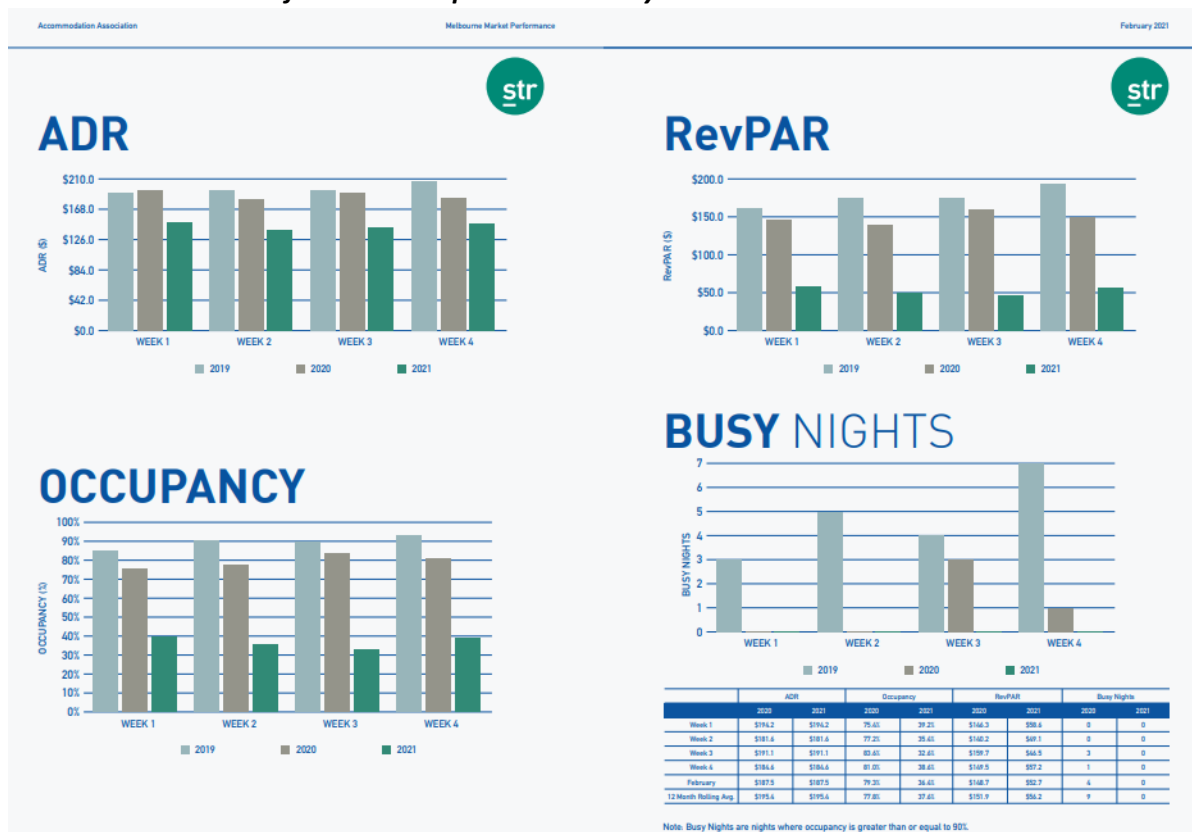
*Supporting Tables*

Mix of visitors pre-COVID (2016-19) strongly disadvantages Melbourne's West tourism region in the balance of 2021 - with 69% of visitor spend from internationals or interstate

	International visitor nights	Domestic day trips	Domestic Interstate visitor nights	Domestic Intrastate visitor nights
Moonee Valley City	44%	16%	23%	16%
Brimbank City	50%	20%	16%	14%
Hobsons Bay City	29%	29%	27%	15%
Marybyrnong City	56%	12%	23%	9%
Melton City	29%	22%	35%	14%
Wyndham City	58%	19%	15%	9%
<b>Melbourne's West tourism region</b>	48%	19%	21%	12%
City of Melbourne	63%	3%	30%	4%
<b>Melbourne tourism region</b>	46%	12%	32%	10%
<b>Regional Victoria average</b>	5%	27%	14%	53%
<b>Victoria</b>	30%	18%	25%	27%

Decisive Consulting, April 2021

Australian Accommodation Association  
Melbourne Market Performance Snapshot – February 2021



## All 6 LGAs have heavy downturns forecast in visitor spend in 2020/21, before near return to 2019 levels in 2022/23

	Moonee Valley City	Brimbank City	Hobsons Bay City	Marybyrnong City	Melton City	Wyndham City	Melbourne's West region	Melbourne Tourism Region	City of Melbourne
<b>Scenario 1</b>									
<b>2020/21</b>	-39%	-39%	-29%	-40%	-35%	-45%	-40%	-41%	-45%
<b>2022/23</b>	5%	5%	7%	5%	6%	6%	6%	4%	3%
<b>Scenario 2</b>									
<b>2020/21</b>	-52%	-50%	-42%	-51%	-49%	-56%	-51%	-53%	-56%
<b>2022/23</b>	-5%	-4%	-4%	-5%	-6%	-2%	-4%	-6%	-6%

Hobsons Bay least and Wyndham most exposed to visitor economy downturn in 2020/21

Karl Flowers ©, for Western Melbourne Tourism and Victoria University, 26/10/20

## All 6 LGAs have heavy job losses forecast in jobs dependent on visitor spend in 2020/21

	Moonee Valley City	Brimbank City	Hobsons Bay City	Maribyrnong City	Melton City	Wyndham City	Melbourne's West tourism region
<b>Scenario 1</b>	790	775	490	800	683	2,322	5,855
<b>Scenario 2</b>	1,062	986	708	1,022	962	2,868	7,609

Karl Flowers ©, for Western Melbourne Tourism and Victoria University, 26/10/20