melbourne's west

Western Melbourne Tourism

Advocacy Priorities

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Western Melbourne Tourism
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Executive Summary

Melbourne's West: A Major Visitor Economy Hiding in Plain Sight

Melbourne's West is one of Victoria's largest and fastest-growing visitor economies, yet its contribution is often overlooked in tourism policy, investment and marketing discussions.

New economic analysis shows visitors spent an estimated $4.4 billion in Melbourne's West in the year ending March 2026, supporting approximately 15,500 direct jobs and contributing around $2 billion to gross regional product. The region generates higher domestic overnight and day-trip visitor expenditure than any of Victoria's 19 regional tourism regions and with international expenditure equivalent to around 65% of all international visitor spending outside Melbourne.

The data tells a clear story. Melbourne's West is not an emerging visitor economy. It is already a significant contributor to Victoria's economy, supported by a rapidly growing population, strong multicultural communities, major aviation gateways and a thriving Visiting Friends and Relatives (VFR) market.

Despite this scale and economic contribution, Melbourne's West remains underrepresented in many of the policy, funding and marketing frameworks designed to support visitor economy growth elsewhere. This creates a participation gap between the value the region contributes and the opportunities available to help it grow.

This paper sets out a series of practical advocacy priorities aimed at lifting the profile of Melbourne's West, creating greater equity within Victoria's visitor economy framework, and unlocking future economic growth for the region and the state.

Key advocacy priorities:

- *Recognize Melbourne's metropolitan visitor region in policy, marketing, research and grant settings, with a proportional cooperative marketing allocation and eligibility parity with regional programs. This includes dedicated marketing support for Western Melbourne Tourism.*
- *Melbourne Airport Rail and the Sunshine Super Hub - release a Sunshine economic masterplan and hardwire visitor economy outcomes into the project delivery*
- *Improve regional connectivity including the funding of the Avalon Rail station*
- *Invest in Tourism and Place-Based Infrastructure - Fund priority place-based projects that anchor identity and convert visitor flow to the region including a Sunshine cultural anchor; Seaworks/Nelson Place; Scienceworks expansion; Hobsons Bay Wetlands Centre; Point Cook Homestead and gateway interchanges.*

Melbourne's West already plays a major role in Victoria's visitor economy. The opportunity now is to ensure policy, investment and industry support recognise that contribution and help realise its full potential. A more coordinated and equitable approach will unlock further visitation, jobs and economic benefits for local communities and the state as a whole.

Melbourne's west visitor economy

$4.4 billion visitor spend annually
15,500 direct jobs supported
$2 billion contribution to gross regional product
International expenditure levels at 65% of international visitor spending outside Melbourne
964,000 residents across six local government areas

Western Melbourne Tourism - Advocacy Priorities for Melbourne’s west

Melbourne’s West is Victoria’s most significant untapped visitor economy. While it is the state’s fastest-growing corridor, it currently operates under a 'participation gap'—where heavy population growth has not been matched by the government tourism investment seen in the CBD, or regional Victoria. Closing this gap is not just a matter of equity; it is an economic imperative to de-centralize Victoria's tourism spending, and future-proof our region’s visitor economy.

Melbourne’s West is one of Victoria’s largest, fastest-growing visitor economies — and it is systematically overlooked in policy, funding and marketing settings that favour the CBD and designated “regional” areas.

In the year to March 2026, visitors spent an estimated $4.4 billion in Melbourne’s West — more than any of Victoria’s 19 regional tourism regions on key measures — supporting around 15,500 direct jobs and contributing roughly $2.0 billion to gross regional product. Despite this scale, the West sits in a “participation gap”: excluded from state marketing, events and many grants, and not recognised as a metropolitan visitor region for planning and investment purposes.

Key proof points:

- ***Total visitor spend: ~$4.4b in YE Mar 2026*** ~ equivalent to 27% of total spend across all of regional Victoria.
- ***Domestic overnight spend: higher than any of the 19 regional tourism regions****;* ~ 18% of all domestic overnight spend outside Melbourne.
- ***Domestic day-trip spend: higher than any regional tourism region****;* ~36% of all day-trip spend outside Melbourne.
- ***International spend: larger than any regional tourism region;*** ~international spend is the equivalent 65% of total international spend outside Melbourne; (77% of international visitor nights - of nights outside Melbourne).
- ***Jobs and GRP: ~15,520 direct jobs (about 4.8% of all jobs in the West)*** and ~$2.0b direct GRP; the West is ~50% more dependent on direct visitor-economy jobs than the balance of Greater Melb (3.2%).
- ***Population and growth:*** 964,000 residents across six LGAs (Aug 2021 Census), growth ~60% faster than Victoria overall (2016–2021), yet the region has 133,000 fewer jobs than resident workers — the visitor economy is one of the fastest levers to create local jobs close to where people live.
- ***Multicultural VFR engine: 60% of international visitor nights in the West are Visiting Friends & Relatives (VFR) — double the state share*** — with outsized strength from Indian and Vietnamese markets (32% of Indian visitor nights in Victoria occur in the West; 27% for Vietnamese), pointing to high-ROI, culturally-led product and marketing.

The region remains under-recognised in Victoria’s visitor economy. Investment and marketing are concentrated in the CBD and established regional destinations, while Melbourne’s middle ring—especially the West—is inconsistently included in the state framework, limiting strategic investment and visibility.

The data shows Melbourne’s West is not an emerging visitor economy; it is an established one. Policy lag now risks suppressing growth, costing jobs, and leaving billions in visitor spend uncaptured or diverted elsewhere.

Western Melbourne Tourism is calling for greater equity and a more coordinated, partnership-based approach to ensure the benefits of the west (and the Greater Melbourne’s visitor economy more broadly) are more evenly distributed - supporting visitation, local jobs and economic development.

1. Infrastructure & Connectivity

There is a major need to strengthen transport, aviation and gateway infrastructure to support visitor access, movement and growth across Melbourne’s West - ensuring major infrastructure delivers visitor economy outcomes, not just transport functionality.

Melbourne Airport Rail (MAR) Project

Sunshine is headed to be the most connected transport hub in the state and will be the de facto 'Capital of the West.' Without a publicly released Masterplan that embeds visitor-centric design—such as high-quality wayfinding, a precinct-scale cultural anchor, and 'sense of arrival' infrastructure—the state risks spending billions on a transit interchange that fails to capture a cent of visitor spend.

Melbourne Airport Rail (MAR) is a transformative project that will position Sunshine as a key regional and urban gateway. However, its visitor economy potential is not yet being fully realised, with a risk it will function primarily as a transport interchange rather than a destination in its own right.

WMT has consistently advocated Sunshine to be developed as a gateway destination, with stronger integration of visitor experiences, services and infrastructure. While initiatives such as the Vietnamese Museum and SkyBus are positive steps, there remains significant untapped potential.

Some progress was being made with Victorian Govt (Dept of Transport) commissioning an economic masterplan for Sunshine, which included the visitor economy as one sector of focus. However, this strategic plan has not yet been publicly released, and any public industry engagement on these opportunities has been very limited. We are concerned that the key design and planning decisions for the MAR will be finalised, before the visitor economy opportunities are properly assessed with the appropriate level of industry engagement.

Avalon Airport and a Dedicated Avalon Railway Station

At a modest investment of approximately $50 million, the Avalon Airport Rail Station represents one of the highest-yield infrastructure 'quick wins' in the state. It connects the West to the world as Melbourne second airport, relieves the Princes Freeway, and directly supports the viability of the Geelong Convention Centre.

Targeted state investment in Avalon Airport is critical to strengthen its role as a regional gateway and improve connectivity for Melbourne’s West. This includes progressing the proposed Avalon Airport Railway Station - a relatively low-cost, high-impact investment (approximately $50 million) on the existing rail line between Little River and Lara, supported by shuttle connections.

Improved rail access would significantly enhance connectivity for visitors, including major events such as the Australian International Airshow and delegates to the Geelong Convention Centre. Local councils, including the City of Greater Geelong and City of Wyndham, strongly support this investment as a key link in the Melbourne–Geelong corridor and future Airport Rail network.

Further improvements to road access, including upgrades to Beach Road, are also important to support airline growth, freight capacity, and broader regional and international connectivity.

Outer Metropolitan Ring Road (OMR)

Commitment to the delivery of the Outer Metropolitan Ring (OMR - Road and Rail) is critical to support long-term growth in Melbourne’s West. The OMR will be a strategic 100-kilometre transport corridor linking the north and west, incorporating both road and future rail infrastructure.

The project would improve connectivity between key economic and transport hubs, including Melbourne Airport, Avalon Airport, the Port of Geelong, and future freight terminals, while reducing pressure on local road networks.

Additional Context: Local Connectivity

In outer growth areas such as Melton, access to tourism experiences remains a significant challenge. Limited public transport, including infrequent bus services and a lack of connections to key attractions such as wineries and regional parks, restricts visitation and workforce access. Addressing these connectivity gaps is critical to unlocking the visitor economy potential of these areas.

Advocacy Asks:

- ✓ Release the Sunshine Station Masterplan and embed visitor economy impact outcomes into MAR delivery (eg dwell time, capture rate, precinct activation) including a state significant cultural anchor, in the development of the Sunshine Superhub. This should also include details on how this will be implemented and the proposed timeline.
- ✓ Commit funding and delivery timeline for the Avalon Airport Railway Station and associated shuttle links before the next Avalon Airshow cycle; integrate with the Airport Rail network and Geelong Convention Centre pipeline.
- ✓ Commit and confirm staging for the Outer Metropolitan Ring (road and future rail), with visitor-movement and coach-access design standards embedded.
- ✓ Improve first/last-mile and public transport connectivity to key attractions in outer-growth LGAs (Wyndham, Melton), including bus frequency and dedicated visitor links to wineries, parks and bay waterfront locations.

2. Fair and Equitable Access to Tourism Marketing, Events and Grant Opportunities

The current 'donut' model of tourism marketing which prioritises the CBD and regional Victoria while bypassing the metropolitan middle ring—is discriminatory and outdated. Western Melbourne requires a dedicated 'metropolitan tourism' seat at the table. We are not asking for a handout, but for inclusion in the Victorian government's tourism ecosystem to enable fair participation and opportunity to access digital and other cooperative marketing resourcing, industry support programs (including VEP's) that tax-paying businesses in the West help fund.

Despite generating ~$4.4b in annual visitor spend and the highest domestic overnight and day-trip spend of any regional tourism region, Melbourne's West has no dedicated pathway into Visit Victoria cooperative marketing, limited access to state events footprint (e.g., RISING), and inconsistent eligibility for tourism grants routinely available to "regional" areas. This is a structural exclusion, not a performance gap.

Current arrangements effectively exclude Victoria's most culturally diverse region from programs and opportunities routinely available elsewhere.

Securing fair and equitable access to state tourism marketing, events and grant programs is critical to unlocking visitor growth in Melbourne's West.

Policy Proposal

Establish a "Metropolitan Visitor Regions Program" across DJSIR, Visit Victoria and Creative Victoria:

- ***Recognise Melbourne's West (and peer regions) as distinct metropolitan visitor regions for marketing, research and grants eligibility.***
- ***Allocate a base cooperative marketing pool proportional to metropolitan regions' share of state visitor spend and growth. For Western Melbourne Tourism we seek an initial $50,000 marketing pilot support package.***
- ***Extend the events footprint of marquee state-funded events into the West with co-curation targets and precinct activation KPIs.***

Currently, Melbourne's West is largely excluded from Visit Victoria marketing activity and key state funding and grant programs for tourism, creative projects and events, which are primarily directed to regional Victoria and Melbourne's CBD. This limits the region's visibility, access to data, and its ability to effectively position itself within the state's tourism system.

The Victorian Government has invested significantly in a strong major events calendar, creating an opportunity to extend the footprint of these events beyond the CBD and regional Victoria into metropolitan areas such as Melbourne's West. There is also an opportunity to strengthen the scale, coordination and visitor appeal of events across the region.

This includes leveraging existing and emerging events across key precincts - including waterfront and cultural locations - to drive visitation and local economic activity.

Further, 60% of international visitor nights in the West are Visiting Friends & Relatives (VFR) — double the state share — with outsized strength from Indian and Vietnamese markets (32% of Indian visitor nights in Victoria occur in the West; 27% for Vietnamese). There are untapped opportunities in culturally-led product and VFR marketing.

A more inclusive approach would enable areas beyond the central city to share in the value of the state's tourism and events investment - leveraging the west's rich multicultural communities, unique offerings, and its emergence as a growing creative and cultural hub.

Advocacy Asks:

- ✓ Recognise Melbourne's West as a metropolitan visitor region in policy, marketing, research and grant settings, with a proportional cooperative marketing allocation and eligibility parity with regional programs via a *Metropolitan Visitor Regions Program*
- ✓ Guarantee access for Melbourne's West to participate in state-led marketing opportunities
- ✓ Extend the footprint of marquee state-funded events (e.g. RISING) into Melbourne's West with co-curation and precinct activation targets.
- ✓ Create a VFR Growth Program tailored to multicultural communities in the West (Indian and Vietnamese priority) to convert international VFR into local experiences and spend.
- ✓ Integrate Melbourne's West into Visit Victoria marketing activity and campaigns
- ✓ Provide equitable access to existing tourism, events and creative grant programs

3. Investment in Tourism and Place-Based Infrastructure

Building on improved access to marketing and events, targeted investment in tourism and place-based infrastructure is critical to ensure Melbourne's West can capture and sustain increased visitation.

Targeted investment in tourism and place-based infrastructure is critical to unlocking the visitor economy potential of Melbourne's West. While the region has significant cultural, heritage and natural assets, many sites remain underdeveloped or lack the infrastructure needed to attract and support visitors.

Melbourne's West offers a distinctive mix of food, arts and culture, nature, and industrial and Indigenous heritage. Strategic investment in place-based infrastructure can better showcase these assets, strengthen regional identity, and support increased visitation.

There is a clear opportunity to invest in:

- cultural, heritage and creative assets that attract and engage visitors
- visitor precincts and activity centres that support tourism experiences
- event and community infrastructure that enables festivals and visitation to parks, regional open space and nature-based assets that draw local and interstate visitors

Strategic investment in these areas will support visitation, local jobs, and broader economic development across the region.

Priority opportunities include:

- As part of the Sunshine Station Masterplan, **development of a state-significant cultural institution (**eg. gallery or museum) representing Melbourne's west, alongside a food / hawker-style market.
- Investment in emerging cultural, visitor and education assets, including projects such as **Scienceworks expansion**, the **Hobsons Bay Wetlands Centre** and **Creative West cultural precinct.**
- Continued development of cultural and waterfront destinations such as the **Seaworks Maritime Precinct and Nelson Place Maritime Tourism Precinct**, including public realm upgrades, heritage restoration and improved connectivity.
- Activation and redevelopment of the **Point Cook Homestead Precinct**.
- Investment in regional parks and open space, including projects such as the **Kororoit and Toolern Regional Parks** and the continued naturalisation of the **Moonee Ponds Creek corridor.**
- Improvements to key visitor gateways such as **Werribee Station Place** and development of the **Footscray Transport interchange**.
- Investment in flexible event infrastructure such as **The Big Shed** in Truganina.

Advocacy Asks:

✓ Invest in the activation and redevelopment of key tourism and cultural assets in Melbourne's West
✓ Support development of visitor precincts and gateway locations
✓ Invest in event and community infrastructure to enable festivals and large-scale gatherings
✓ Support waterfront and open space activation to enhance visitor experiences
✓ Partner with local councils to deliver place-based infrastructure that supports the visitor economy

Together, these priority areas present a coordinated opportunity to strengthen Melbourne's West as a key contributor to Victoria's visitor economy. With the right combination of connectivity, visibility and place-based investment, the region is well positioned to support increased visitation, local jobs and long-term economic growth.

Attachment 1

Melbourne’s West Visitor Economy - Update report - June2026
Analysis undertaken by Decisive Consulting

Melbourne’s West’s Visitor Economy – Update Report

June 2026

1. Purpose and Scope

This report provides a timely update on Melbourne's West visitor economy using data to end of March 2026 for three reasons.

Firstly, historical data for this region of even two years ago was biased by the oversize negative impact of COVID and its hangover for this region's visitor economy. In particular, the closure of international borders had a disproportionate impact on this region's visitor economy compared to other regions of Victoria which are less reliant on international visitors.

Secondly, the most recent Australian Bureau of Census data from 10 August 2021 was in the midst of a whole of State lockdown after a handful of other lockdowns and the end of Job Keeper support. This Census therefore provides a major underestimate of the importance of the visitor economy in providing employment in this and all Victorian regions. This problem is more important due to Census data being the underlying source of REMPLAN estimates of employment by industry often used by local government areas (see Attachment 3).

Thirdly, the new domestic tourism data collection from the beginning of 2025 provides a far more reliable guide to local government area level domestic overnight and day trip travel by using data on mobile phone tower pings as well as survey data. Importantly, this data for the first time provides detailed visitor spending data by local government area for domestic overnight and day trip travel and provides this data quarterly. This is a much enhanced source of insights for its quality/reliability improvement, ease of use and its coverage (for more details see Attachment 2).

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2. Key findings

Melbourne's West region has a large population with recent rapid growth

There was a population of nearly a million in the August 2021 Census in the six local government areas (LGAs) that make up Melbourne's West region (964,000). Across these six LGAs average population growth from August 2016 was just under 16%, or nearly 60% faster than the growth in total Victorian population (under 10%).

The LGAs of Wyndham and Melton, as the furthest in this region from the Melbourne CBD, grew population by 35% and 32% respectively, while the closer in LGAs of Moonee Valley (4%), Maribyrnong (4%), Hobsons Bay (3%) and Brimbank (0%) grew resident populations far more slowly in these five years.

In August 2021 Melbourne's West 6 LGAs had 51% of the total population of regional Victoria and 21% of Melbourne region's total population.

It is hard to argue that the Melbourne's West community gets the policy focus, including for the visitor economy and transport infrastructure support from the State Government in proportion to its share of the State's population and in comparison with areas in regional Victoria.

Far fewer jobs in the region than residents with jobs puts pressure on transport infrastructure and imposes often long commute times

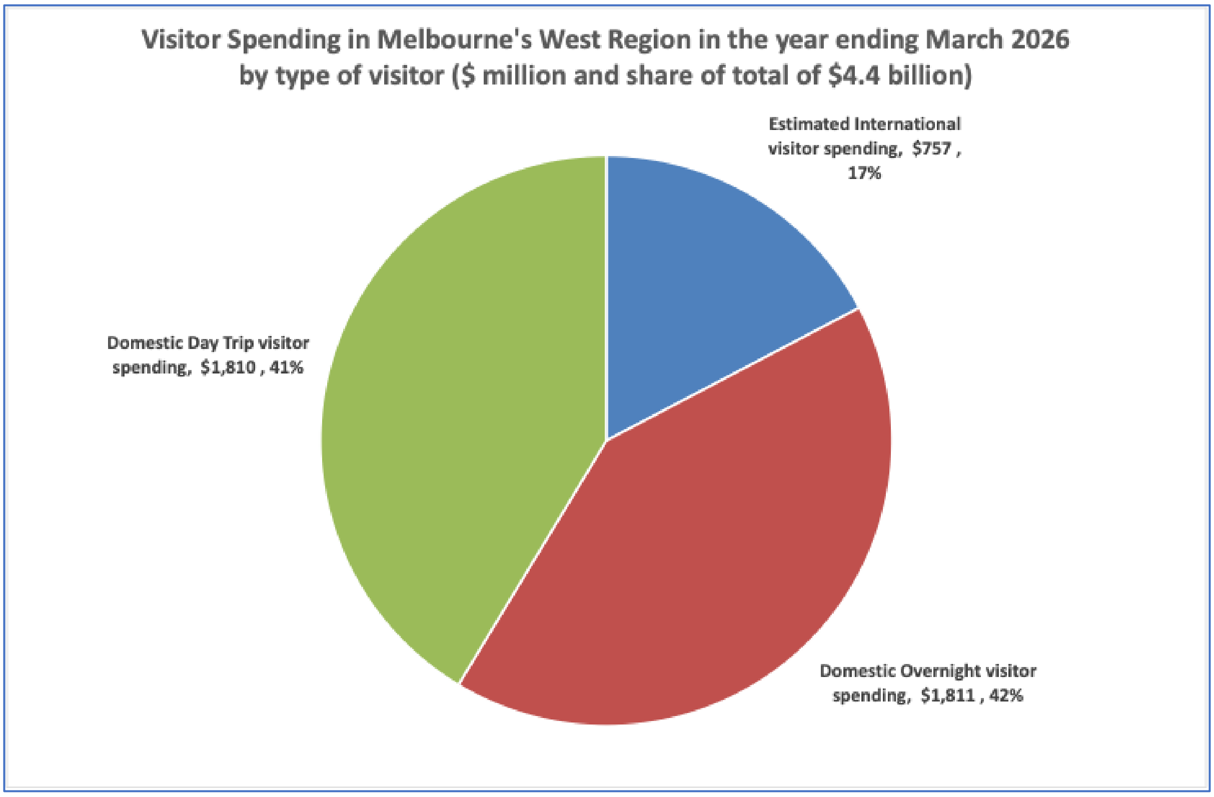
In August 2021 in the Melbourne West region for every job in the region at a place of work there were 1.41 regional residents with jobs. Put another way there were 133,000 more regional residents in work than jobs in the region as a place of work.

Rapid population growth in association with transport infrastructure not keeping pace has increased time and financial costs for the many regional residents who work outside their region. A better outcome would be rapid growth in jobs within the Melbourne West region, so residents face shorter commutes and there is less pressure on transport infrastructure and family lives.

The visitor economy is one of the potential employment growth industries that can bring more jobs to this region.

Melbourne's West tourism region had heavy reliance on domestic tourism spend but also significant international visitor spending in year ended March 2026

The following chart summarises some of the data in the following sections of this report on the comparative contribution of domestic overnight, domestic day trip and international overnight tourism to total Melbourne West region visitor spending in year ended March 2026.



Total visitor spending in Melbourne's West in comparison to this spending in the regions of regional Victoria in year ending March 2026

Melbourne's West region had nearly double the total visitor spending in the year ended March 2026 of the region in regional Victoria (Mornington Peninsula) with the largest total visitor spend.

Melbourne's West region had 27% of the total visitor spending in Regional Victoria in the year ended March 2026.

Visitor Spending in Melbourne's West region compared to Regional Victorian tourism regions in year ended March 2026 ($ Millions)	Estimated International visitor spending	Domestic Overnight visitor spending	Domestic Day Trip visitor spending	Total Estimated Visitor Spending
Melbourne's West Region (6 LGAs)	**$ 757**	**$ 1,811**	**$ 1,810**	**4,377**
Central Highlands	9	197	61	267
Central Murray	113	467	218	797
Geelong and the Bellarine	171	689	544	1,404
Gippsland	46	497	388	931
Goulburn	112	621	449	1,183
Great Ocean Road	135	1,304	365	1,803
Greater Ballarat	90	182	332	604
Greater Bendigo	39	341	290	670
Lakes	13	339	66	417
Macedon	23	130	92	245
Mallee	149	393	149	691
Mornington Peninsula	74	1,412	760	2,246
Murray East	1	138	86	225
Phillip Island	12	574	115	701
Spa Country	32	575	78	685
Victoria's High Country	21	1,157	296	1,474
Western Grampians	9	140	119	268
Wimmera	1	113	63	176
Yarra Valley and Dandenong Ranges	108	636	505	1,249
Regional Victoria Total	1,158	9,903	4,974	16,036
Share of Melbourne's West of Regional Victoria Total Visitor Spending	65%	18%	36%	27%

Source: TRA, DoTS and International Visitor Survey results for year ending March 2026.

Notes:

1. Domestic overnight and domestic day trip spending estimate from published TRA estimates from the DoTS collection by region or for Melbourne's West as the addition of the six LGAs in this region.
2. International visitor spending by region estimated using TRA estimates of international visitor spending for the six purposes of visit per visitor night on the whole trip to Australia and regional data on international visitor nights for these purposes.
3. Domestic overnight and day trip visitor spending for the Geelong, Ballarat, Bendigo and Spa Country tourism regions in the first quarter of 2026 was influenced by changes in region boundaries compared to the regions in 2025. The year ended March 2026 data only included one quarter of this change. The more significant change in tourism flows is to increase Spa Country to the north to include the previous Bendigo areas of Castlemaine and Maryborough adding two new LGAs to this region, and both Bendigo and Spa Country data will be significantly changed as this regional area change is made to the annual data by TRA later this year.

Economic importance for the Melbourne West region of the visitor economy

A more accurate estimate of jobs in Melbourne's West due to direct impact of tourist spending than that available from REMPLAN (see Attachment 3 for review of problems with REMPLAN's estimates) comes from using:

- the TRA data based estimate of total visitor spending in Melbourne's West in year ended March 2026 of $4.4 billion;
- the TRA regional tourism satellite account for Melbourne Tourism Region for 2023/24 that included an estimate of total tourist spending of $24.7bn, that translated to direct gross regional product of $11.3bn (or 46% flow through) and translated to 87,500 direct jobs due to visitor spending (or $282,000 of visitor spending per direct job).

This implies the direct contribution from tourism spending to Melbourne's West region gross regional product was $2.0 billion in the year ended March 2026.

This also implies jobs in Melbourne's West due to direct impacts of visitor spending of 15,520 jobs, which compared to the ABS Census estimate of 323,000 jobs in this region as a place of work suggests 4.8% of total jobs are due to direct impacts of visitor spending. Importantly, Melbourne's West is far more reliant on the visitor economy for jobs than the balance of Greater Melbourne which using the same calculation method only had 3.2% of jobs dependent on the direct impacts of visitor spending.

That Melbourne's West is around 50% more dependent on visitor spending for direct jobs than the balance of Greater Melbourne, highlights a point not widely appreciated.

It is also relevant to note that the TRA regional tourism satellite account for Melbourne Tourism region indicates that 55% of regional jobs due to direct impacts of tourism spending were full time positions with 45% part time positions.

Melbourne's West tourism region had more domestic overnight visitor spending than any of the 19 tourism regions of Regional Victoria in year ended March 2026

Melbourne's West visitor economy was significantly larger in domestic overnight visitor expenditure in year ending March 2026 than any of the 19 tourism regions in Victoria outside Melbourne. Melbourne's West visitor economy provided the equivalent of over one in six dollars (18%) of the total domestic overnight visitor spending in all areas of Victoria outside Melbourne in year ending March 2026.

Domestic overnight tourism in Year ending Mar 2026	Visitor Expenditure ($000)	Visitor Nights	Trips
Melbourne's West Region (6 LGAs)	**1,810,874**	**6,509,355**	**2,694,245**
Mornington Peninsula	1,411,606	7,069,843	2,856,067
Great Ocean Road	1,303,765	5,543,601	2,152,941
Victoria's High Country	1,156,636	4,644,295	1,910,201
Geelong and the Bellarine	875,159	6,386,352	2,651,754
Yarra Valley and Dandenong Ranges	636,388	2,834,569	1,246,707
Goulburn	621,406	2,501,845	1,126,526
Greater Bendigo	578,538	2,874,400	1,270,785
Phillip Island	574,172	2,669,775	1,057,779
Gippsland	497,128	4,469,676	1,944,139
Central Murray	466,622	2,211,642	941,918
Greater Ballarat	468,567	2,501,855	1,035,845
Mallee	392,521	1,783,881	678,397
Lakes	338,791	1,761,551	681,881
Spa Country	707,989	3,273,652	1,357,752
Central Highlands	196,916	895,315	414,340
Western Grampians	140,378	922,803	431,095
Murray East	138,052	671,989	279,551
Macedon	129,776	740,305	353,964
Wimmera	113,080	632,199	302,778

Source: TRA, DoTS, year ending March 2026.
Notes: Domestic overnight and day trip visitor spending for the Geelong, Ballarat, Bendigo and Spa Country tourism regions in the first quarter of 2026 was influenced by changes in region boundaries compared to the regions in 2025. The year ended March 2026 data only included one quarter of this change. The more significant change in tourism flows is to increase Spa Country to the north to include the previous Bendigo areas of Castlemaine and Maryborough adding two new LGAs to this region, and both Bendigo and Spa Country data will be significantly changed as this regional area change is made to the annual data by TRA later this year.

Melbourne's West tourism region also had more domestic overnight holiday visitor spending than any of the 19 tourism regions of Regional Victoria in year ended March 2026

Even restricting the comparison to holiday purpose domestic overnight tourism in year ending March 2026 and Melbourne's West region still had a larger visitor spend than any of the 19 tourism regions outside Melbourne. This counters the argument that the domestic overnight visitation to Melbourne's West compared to regional Victoria is far more dominated by travel for other purposes than holiday and in particular for visiting friends and relatives or for business purposes.

Melbourne's West visitor economy provided the equivalent of just under one in six dollars (15%) of the total domestic overnight holiday visitor spending in all areas of Victoria outside Melbourne in year ending March 2026.

Domestic overnight holiday tourism in Year ending Mar 2026	Visitor Expenditure ($000)	Visitor Nights	Trips
Melbourne's West Region (6 LGAs)	**1,025,972**	**2,641,094**	**1,100,057**
Great Ocean Road	976,508	3,869,548	1,478,218
Victoria's High Country	928,106	3,476,255	1,360,119
Mornington Peninsula	906,589	3,826,923	1,520,636
Geelong and the Bellarine	688,685	2,253,163	930,673
Phillip Island	457,417	2,030,887	764,521
Yarra Valley and Dandenong Ranges	344,911	1,098,282	496,673
Greater Bendigo	340,612	1,372,336	565,906
Central Murray	310,038	1,369,647	553,169
Gippsland	290,953	2,298,133	947,168
Goulburn	261,675	718,876	344,341
Lakes	254,098	1,297,818	475,799
Mallee	204,988	966,696	321,330
Spa Country	195,854	788,511	343,436
Greater Ballarat	181,871	838,712	365,436
Central Highlands	157,547	670,276	302,401
Western Grampians	80,264	575,579	243,428
Macedon	65,137	271,506	128,633
Wimmera	61,837	349,660	185,024
Murray East	36,861	123,863	57,092

Source: TRA, DoTS, year ending March 2026.
Notes: Domestic overnight and day trip visitor spending for the Geelong, Ballarat, Bendigo and Spa Country tourism regions in the first quarter of 2026 was influenced by changes in region boundaries compared to the regions in 2025. The year ended March 2026 data only included one quarter of this change. The more significant change in tourism flows is to increase Spa Country to the north to include the previous Bendigo areas of Castlemaine and Maryborough adding two new LGAs to this region, and both Bendigo and Spa Country data will be significantly changed as this regional area change is made to the annual data by TRA later this year.

Melbourne's West tourism region had considerably more domestic day trip visitor spending than any of the 19 tourism regions of Regional Victoria in the year ended March 2026

Melbourne's West visitor economy was considerably larger in domestic day trip visitor expenditure in year ending March 2026 than any of the 19 tourism regions in Victoria outside Melbourne. Melbourne's West visitor economy provided the equivalent of over one in three dollars (36%) of the total domestic day trip visitor spending in all areas of Victoria outside Melbourne in year ending March 2026.

Domestic day trip tourism in Year ending Mar 2026	Visitor Expenditure ($000)	Trips
Melbourne's West Region (6 LGAs)	**1,809,819**	**11,036,888**
Mornington Peninsula	760,077	5,402,280
Geelong and the Bellarine	543,548	3,912,870
Yarra Valley and Dandenong Ranges	504,616	4,030,144
Goulburn	449,273	1,888,709
Gippsland	387,965	2,786,280
Great Ocean Road	364,763	1,879,760
Greater Ballarat	332,399	1,968,672
Victoria's High Country	296,004	1,528,591
Greater Bendigo	289,701	1,599,222
Central Murray	217,724	887,338
Mallee	149,402	549,992
Western Grampians	118,975	479,666
Phillip Island	114,683	694,545
Macedon	91,544	867,244
Murray East	85,718	261,567
Spa Country	78,346	457,677
Lakes	65,598	379,210
Wimmera	62,521	336,271
Central Highlands	61,331	340,088

Source: TRA, DoTS, year ending March 2026.
Notes: Domestic overnight and day trip visitor spending for the Geelong, Ballarat, Bendigo and Spa Country tourism regions in the first quarter of 2026 was influenced by changes in region boundaries compared to the regions in 2025. The year ended March 2026 data only included one quarter of this change. The more significant change in tourism flows is to increase Spa Country to the north to include the previous Bendigo areas of Castlemaine and Maryborough adding two new LGAs to this region, and both Bendigo and Spa Country data will be significantly changed as this regional area change is made to the annual data by TRA later this year.

Melbourne's West tourism region had more domestic holiday day trip visitor spending than any of the 19 tourism regions of Regional Victoria in year ended March 2026

Melbourne's West visitor economy was considerably larger in domestic holiday day trip visitor expenditure in year ending March 2026 than any of the 19 tourism regions in Victoria outside Melbourne.

Melbourne's West visitor economy provided the equivalent of over one in three dollars (34%) of the total domestic holiday day trip visitor spending in all areas of Victoria outside Melbourne in year ending March 2026.

Domestic holiday day trip tourism in Year ending Mar 2026	Visitor Expenditure ($000)	Trips
Melbourne's West Region (6 LGAs)	**1,024,760**	**5,099,485**
Mornington Peninsula	522,002	3,452,258
Yarra Valley and Dandenong Ranges	346,564	2,580,792
Geelong and the Bellarine	317,492	2,052,607
Great Ocean Road	264,941	1,420,902
Goulburn	241,561	791,925
Gippsland	218,052	1,433,081
Victoria's High Country	212,134	1,142,884
Greater Bendigo	187,226	876,342
Greater Ballarat	163,223	888,747
Central Murray	112,466	349,453
Mallee	105,848	352,100
Phillip Island	81,561	491,551
Western Grampians	65,172	246,164
Spa Country	48,387	235,765
Murray East	35,033	114,005
Lakes	34,776	196,083
Macedon	32,666	347,583
Wimmera	32,075	184,254
Central Highlands	31,130	204,725

Source: TRA, DoTS, year ending March 2026.
Notes: Domestic overnight and day trip visitor spending for the Geelong, Ballarat, Bendigo and Spa Country tourism regions in the first quarter of 2026 was influenced by changes in region boundaries compared to the regions in 2025. The year ended March 2026 data only included one quarter of this change. The more significant change in tourism flows is to increase Spa Country to the north to include the previous Bendigo areas of Castlemaine and Maryborough adding two new LGAs to this region, and both Bendigo and Spa Country data will be significantly changed as this regional area change is made to the annual data by TRA later this year.

Melbourne's West tourism region had far more international visitor spending than any of the 19 tourism regions of Regional Victoria in year ended March 2026

Melbourne's West visitor economy had considerably larger estimated international overnight visitor spending than the 19 tourism regions in regional Victoria. This result was due to much greater visitor nights, with a particular bias to an unusually high 60% share for visiting friends and relatives in total Melbourne West international visitor nights.

Melbourne's West visitor economy provided the equivalent of two-thirds (65%) of the total international overnight visitor spending in all areas of Victoria outside Melbourne in year ending March 2026. Similarly, Melbourne's West visitor economy provided the equivalent of 77% of the total international visitor nights in all areas of Victoria outside Melbourne in year ending March 2026.

While domestic overnight visitor and domestic day trip visitor spending are readily extracted from published data from Tourism Research Australia, estimating international overnight visitor spending is more complicated. While LGA and regional level data is published by TRA for domestic overnight and day trip spend, only international visitor nights are published for Victoria's tourism regions and for the 56 statistical area level 2s in Melbourne's West region. Estimating international overnight visitor spend used the published TRA estimates for international visitor nights multiplied by average per visitor night spend from the published TRA data for the whole trip to Australia for the six purposes of visit of holiday, VFR, business, education, employment and other reasons.

International visitor nights and estimated spending for Year ended March 2026	Estimated International Visitor Spending	International Visitor Nights
Melbourne's West Region (6 LGAs including 56 SA2s)	**$ 756,633,817**	**7,514,619**
Geelong and the Bellarine	$ 171,481,912	1,374,384
Mallee	$ 148,753,717	1,361,372
Great Ocean Road	$ 134,929,214	1,090,303
Central Murray	$ 112,757,426	764,011
Goulburn	$ 111,877,530	974,030
Yarra Valley and Dandenong Ranges	$ 107,646,282	1,144,761
Greater Ballarat	$ 89,767,712	599,645
Mornington Peninsula	$ 74,404,753	646,314
Gippsland	$ 45,946,031	456,110
Greater Bendigo	$ 39,285,858	231,460
Spa Country	$ 32,111,406	247,369
Macedon	$ 23,288,680	221,900
Victoria's High Country	$ 20,874,742	189,997
Lakes	$ 12,696,494	161,137
Phillip Island	$ 11,699,020	100,677
Central Highlands	$ 9,231,605	104,245
Western Grampians	$ 8,923,380	107,729
Murray East	$ 1,463,331	13,929
Wimmera	$ 831,249	10,515
Total Regional Victoria	1,157,970,341	9,799,887
Share of Melbourne's West of Total Regional Victoria	65%	77%

Source: TRA, DoTS and International Visitor Survey results for year ending March 2026.
Notes:
International visitor spending by region estimated using TRA estimates of international visitor spending for the six purposes of visit per visitor night on the whole trip to Australia and regional data on international visitor nights for these purposes.

Melbourne's West international visitation was highly dependent on an often multi-cultural resident population hosting visiting friends and relatives

Melbourne's West had a 60% share of international visitor nights from VFR visitors in the year ending March 2026, around double the share for Victoria as a whole. This implies that tourism marketing should focus on getting local hosts to accompany or encourage visitation by international guests to local attractions.

Share of International visitor nights in year ended March 2026	Holiday	Visiting friends and relatives	Business	Employment	Education	Other reason
Victoria	26%	29%	3%	11%	30%	1%
Melbourne's West	**9%**	**60%**	**0%**	**8%**	**21%**	**2%**

Source: TRA, International Visitor Survey results for year ending March 2026.

Indian visitors were the standout nationality for providing international visitor nights in Melbourne's West in the year ending March 2026. Of all Indian origin international visitor nights in Victoria in this year, nearly a third (32%) were spent in the Melbourne West region. Also interesting was that of all Vietnamese origin international visitor nights in Victoria in this year, 27% were spent in the Melbourne West region. This suggests opportunities for an Indian cultural centre with food celebrating India's regions in Melbourne's West.

International visitor nights by main source markets in year ended March 2026	Melbourne's West International Visitor Nights	Melbourne's West	Victoria	Regional Victoria
NZ	264,140	4%	4%	7%
China including HK	849,599	11%	26%	5%
Taiwan	336,653	4%	6%	12%
Vietnam	607,996	8%	3%	2%
India	3,591,722	48%	14%	6%
Other Asia	823,967	11%	23%	28%
USA	121,934	2%	3%	5%
UK	224,223	3%	7%	10%
Europe	237,001	3%	8%	12%
Other Countries	457,382	6%	7%	12%
Total	7,514,619	100%	100%	100%

Source: TRA, International Visitor Survey results for year ending March 2026.

Looking at the share of residents of the 79 Victorian local government areas with both parents born overseas. All six of the Melbourne's West LGAs are in the top 20 of the 79 Victorian local government areas with both parents born overseas, with Brimbank and Wyndham LGAs in second and third place on this ranking.

LGA (Usual Residence) data from the August 2021 ABS Census	Share of resident population with both parents born overseas
Greater Dandenong	78%
Brimbank	70%
Wyndham	66%
Monash	66%
Melbourne	62%
Manningham	60%
Hume	60%
Casey	59%
Whittlesea	56%
Melton	55%
Whitehorse	53%
Maribyrnong	52%
Glen Eira	50%
Moreland	48%
Darebin	45%
Knox	45%
Hobsons Bay	44%
Boroondara	44%
Kingston (Vic.)	43%
Moonee Valley	43%

Source: ABS Census August 2021.

Attachment 1 - Key Performance Indicators for the Melbourne's West region and Council areas with baseline year ended March 2026 data

In the last two decades regional visitation performance has commonly been driven at least as much by factors beyond the control of regions such as COVID, RBA interest rate policy, immigration policy and A$ exchange rate as local factors of new attractions/accommodation and regional marketing. In this light and to avoid setting dollar or visitor nights forecasts, the better key performance indicators for the Melbourne West region are to increase the region's market shares of Victorian and Melbourne above the year ended March 2026 shares baseline of:

1. Total visitor spending
2. Domestic visitor nights and associated visitor spending
3. Domestic day trips and associated visitor spending
4. International visitor nights and associated estimated visitor spending, the latter calculated using Australian averages for total spend per visitor night for the six categories of travel.

In parallel, the obvious key performance indicators for each of the six Council areas in the Melbourne West region are to increase the Council's market shares of Victorian and Melbourne above the year ended March 2026 shares baseline of :

1. Total visitor spending
2. Domestic visitor nights and associated visitor spending
3. Domestic day trips and associated visitor spending
4. International visitor nights.

The data on baseline performance by LGA in year ending March 2026 is shown in the following tables for firstly visitor spending and then visitation by category of visitor alongside share of Victorian State and Melbourne tourism region totals.

Visitor Spending category/LGA year ended March quarter 2026	$m	Share of Victoria	Share of Melbourne Tourism Region
Domestic overnight visitor spending			
Brimbank (LGA)	246	1.05%	1.95%
Hobsons Bay (LGA)	208	0.89%	1.65%
Maribyrnong (LGA)	216	0.93%	1.72%
Melton (LGA)	383	1.65%	3.04%
Moonee Valley (LGA)	265	1.14%	2.10%
Wyndham (LGA)	493	2.12%	3.91%
Melbourne's West Region (6 LGAs)	1,811	7.77%	14.37%
Domestic day trip visitor spending			
Brimbank (LGA)	304	2.05%	3.08%
Hobsons Bay (LGA)	293	1.97%	2.97%
Maribyrnong (LGA)	227	1.53%	2.31%
Melton (LGA)	322	2.17%	3.27%
Moonee Valley (LGA)	212	1.43%	2.16%
Wyndham (LGA)	452	3.05%	4.59%
Melbourne's West Region (6 LGAs)	1,810	12.21%	18.38%
International overnight tourism visitor spending			
Brimbank (LGA)	N/A	N/A	N/A
Hobsons Bay (LGA)	N/A	N/A	N/A
Maribyrnong (LGA)	N/A	N/A	N/A
Melton (LGA)	N/A	N/A	N/A
Moonee Valley (LGA)	N/A	N/A	N/A
Wyndham (LGA)	N/A	N/A	N/A
Melbourne's West Region (6 LGAs)	756	7.92%	8.27%

Visitation category/LGA Year ended March quarter 2026	Visitation	Share of Victoria	Share of Melbourne Tourism Region
Domestic visitor nights			
Brimbank (LGA)	990,522	1.14%	2.79%
Hobsons Bay (LGA)	764,954	0.88%	2.15%
Maribyrnong (LGA)	659,956	0.76%	1.86%
Melton (LGA)	1,419,211	1.63%	3.99%
Moonee Valley (LGA)	873,533	1.01%	2.46%
Wyndham (LGA)	1,801,179	2.07%	5.07%
Melbourne's West Region (6 LGAs)	6,509,355	7.50%	18.32%
Domestic day trips			
Brimbank (LGA)	1,947,035	2.27%	3.51%
Hobsons Bay (LGA)	1,818,136	2.12%	3.28%
Maribyrnong (LGA)	1,253,787	1.46%	2.26%
Melton (LGA)	1,900,091	2.22%	3.43%
Moonee Valley (LGA)	951,964	1.11%	1.72%
Wyndham (LGA)	3,165,875	3.69%	5.71%
Melbourne's West Region (6 LGAs)	11,036,888	12.88%	19.90%
International visitor nights			
Brimbank (LGA)	668,463	0.80%	0.91%
Hobsons Bay (LGA)	1,071,746	1.29%	1.46%
Maribyrnong (LGA)	792,774	0.95%	1.08%
Melton (LGA)	665,717	0.80%	0.91%
Moonee Valley (LGA)	364,626	0.44%	0.50%
Wyndham (LGA)	3,951,293	4.75%	5.38%
Melbourne's West Region (6 LGAs)	7,514,619	9.03%	10.23%

In practice, the expected continued more rapid population growth of particularly the Melton and Wyndham LGAs compared to Melbourne and Victoria promises to continue to boost the Melbourne's West region shares of the Melbourne and Victoria visitation market, most obviously for international visitation.

The Jobs Multiplier from the Regional Tourism Satellite Account indicates that for each $1m in visitor spending generated by projects in Melbourne's West tourism region:

- 3.5 direct jobs due to visitor spending are created; and
- $460,000 is added to gross regional product.

Without detailed visitation forecasts from business cases for potential projects, it is impractical to estimate economic multipliers for these projects.

Attachment 2 - Background on the new TRA Domestic tourism collection (DoTS) at the LGA level

The very good news on visitation data availability for Melbourne's West arose with the replacement of the longstanding TRA Domestic Visitor Survey (1999 to end of 2024) with the DoTS collection of domestic overnight and domestic day trip data.

The DoTS collection incorporates mobility data from telephone pings to provide a far more accurate guide to domestic overnight and day trip travel, most especially at an LGA level.

A second big win for Melbourne's West region is that this LGA data provides for the first time domestic overnight and day trip visitor spending data on a quarterly basis. By publishing at an LGA level, the previous tortured process of selecting and aggregating domestic data across 56 of the roughly 260 Statistical local areas in the Melbourne Tourism Region is sidestepped (though this horrible process was still required for international data reported in this report).

Attachment 3 - Background on the problems with using REMPLAN-based estimates of the jobs by industry by local government area for the visitor economy

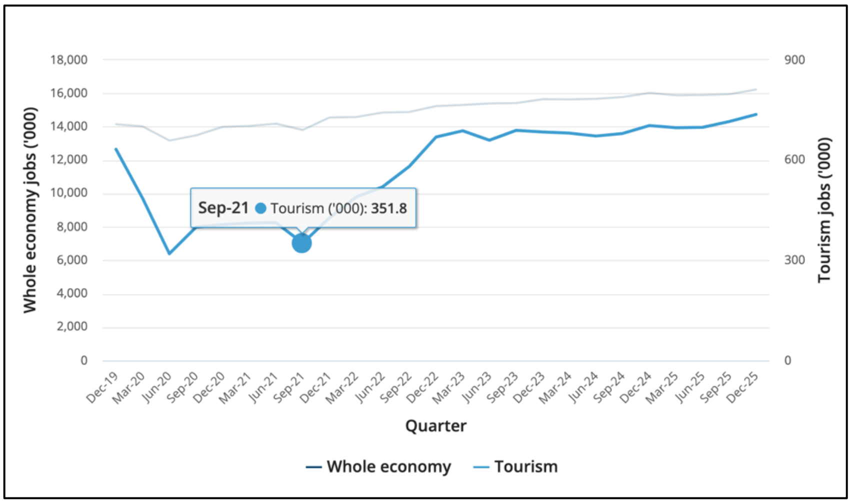
The six LGAs in the Melbourne's West region like many local government areas are expected to often rely on REMPLAN data on the scale of employment contributed by various industries including tourism.

In most industries this data source provides highly reliable and best available indicator.

However, as REMPLAN industry employment estimates are built up from the full population enumeration of the Australian Bureau of Statistics (ABS) Census 2021, they have two major problems in reflecting the scale of the tourism industry in Melbourne's West currently:

- The collection of the ABS Census on the 10th of August in 2021 was in one of the most acute COVID whole of Victoria lockdown periods, and tourism employment had been reduced by the previous near 18 months of the COVID period, and especially post the end of the Australian government support for Job Keeper at the end of March 2021;
- The collection of the ABS Census is midweek in mid-winter outside school holiday time, which is the low season for visitation to Cardinia Shire.   Year average statistics from TRA are more representative of tourism industry performance.

The following chart from the ABS highlights how national tourism industry employment was unusually hard hit during the COVID period compared to total employment and how the ABS Census in August 2021 is close to the trough of national tourism employment. From December 2019 to September 2021, national tourism employment fell by 44%, and December 2025 is estimated to have national tourism employment near double that of September 2021.



Source: ABS Quarterly Tourism Labour Statistics https://www.abs.gov.au/statistics/economy/national-accounts/quarterly-tourism-labour-statistics/latest-release