

SHELLHARBOUR

DESTINATION MANAGEMENT PLAN

2025 - 2035

Shellharbour CITY COUNCIL



ACKNOWLEDGEMENT OF
COUNTRY

Shellharbour City Council acknowledges the Traditional Custodians of Dharawal Country and recognises their continued connection to the land. We pay our respects to Elders past, present and emerging and the contribution they make to the life of this City.

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MAYORS MESSAGE

Shellharbour has always been shaped by its coastline, its people and a deep sense of place. As someone who grew up surfing at Warilla Beach and The Farm at Killalea, I have seen our city evolve from a quiet coastal community into a vibrant destination, guided by a commitment to balance growth with the values that define us. Investments such as Shellharbour Marina and Waterfront Shell Cove, the upcoming Shellharbour Boathouse dry dock facility, the Shellharbour Airport Precinct and The Links Shell Cove, are creating jobs, attracting visitors and strengthening our economy while maintaining our coastal character.

At the same time, we recognise our responsibility to protect the natural places that make Shellharbour special. From the Killalea National Surfing Reserve to Bushrangers Bay, Lake Illawarra and Macquarie Pass, these landscapes are central to our identity. Together, we are guided by a clear vision, to support local jobs and economic opportunity while protecting our environment and enhancing community wellbeing. Council's role is to support and enable this work, ensuring growth is sustainable, well managed and benefits our whole community.

This Shellharbour Destination Management Plan sets out a clear path for the future. It builds on our history, responds to new opportunities and helps us plan ahead. I encourage you to read the plan and be part of shaping Shellharbour as a great place to live, work and visit.

Chris Homer
Mayor, Shellharbour

EXECUTIVE SUMMARY

The **Shellharbour Destination Management Plan (DMP) 2025 – 2035** has been prepared to provide a strategic approach to strengthening the visitor economy in the area over the next ten years.

It positions the City as a distinctive, nature led coastal destination with vibrant precincts, protected natural areas, growing aviation and marine experiences, and a strong sense of culture and community.

Shellharbour is entering a new phase. With major investments across the LGA, the City is transitioning from development to consolidation and preparing for growth. The Plan ensures this growth is sustainable, supports the community, and protects the environment.

Extensive engagement shaped the Plan through workshops, surveys, pop ups and industry feedback. Their message was clear: grow tourism, but preserve what makes Shellharbour special, its natural places, coastal lifestyle and community feel.

The intention of this plan is to support the objectives of the State Government's NSW Visitor Economy Strategy 2035.



ABOUT THIS PLAN

The **Shellharbour Destination Management Plan (DMP) 2025–2035** sets the direction for a sustainable and thriving visitor economy that benefits both residents and visitors.

PURPOSE

This plan defines the strategic priorities to position Shellharbour as a leading coastal destination. It clarifies the roles of Council, tourism operators and community stakeholders, supporting coordinated implementation and accountability.

Aligned with Council's Integrated Planning and Reporting (IP&R) framework, the Shellharbour DMP supports broader community outcomes, strengthens governance and informs transparent decision-making.

It also aligns with state and regional strategies, including the NSW Visitor Economy Strategy 2030 and Destination Sydney Surrounds South Regional Tourism Strategy.

Responding to evolving visitor expectations, increased competition and growing demand for high-quality, nature-based and culturally rich experiences, the Shellharbour DMP provides a clear pathway for the next decade, ensuring tourism growth is sustainable, community-aligned and protects natural and cultural assets.



EVIDENCE-BASED FOUNDATION

The plan is informed by data analysis, industry consultation and community engagement. Market research, visitor insights and economic data have shaped priorities and identified growth opportunities.

This evidence-based approach ensures strategies are grounded in current conditions and able to respond to change. Ongoing monitoring and evaluation will support adaptive management and maintain relevance over time.

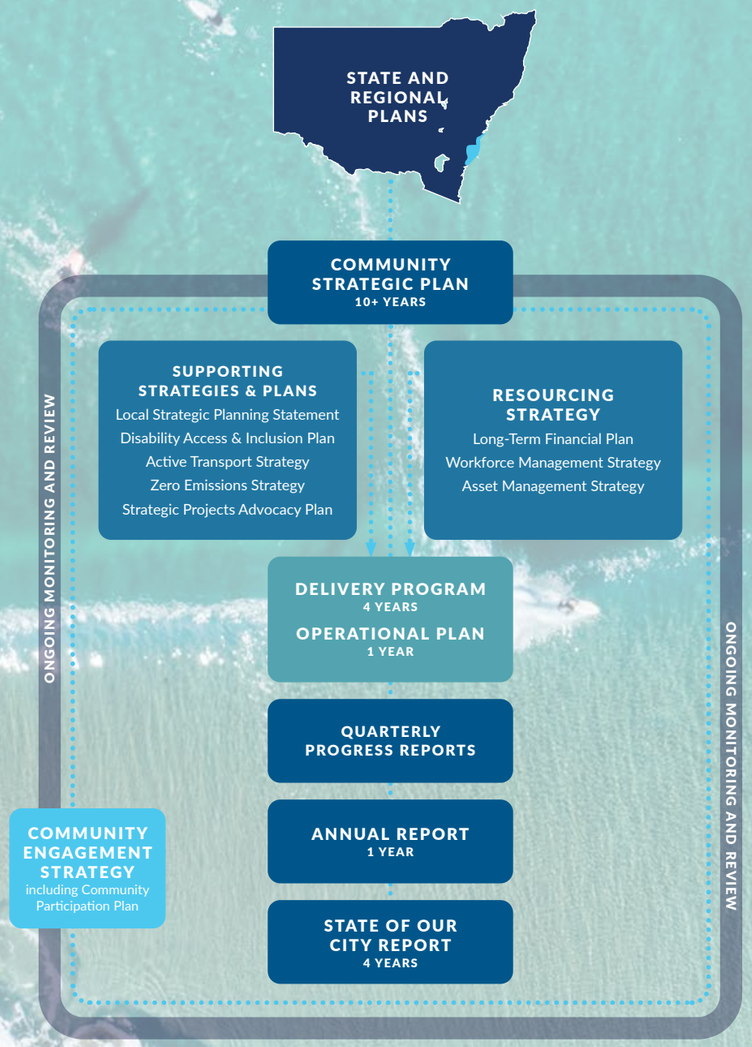
GOVERNANCE FRAMEWORK

The Shellharbour DMP operates within a governance framework aligned to the Shellharbour Community Strategic Plan (CSP), ensuring tourism contributes to community wellbeing, environmental stewardship and economic growth.

Delivery is supported through dedicated resources, cross-Council collaboration and partnerships with regional and state agencies, maximising collective impact across the destination.

DELIVERY APPROACH

This Shellharbour Destination Management Plan establishes tourism as a shared responsibility model where government, industry, and community partners work together. Success requires coordinated effort, with each stakeholder contributing unique capabilities to deliver exceptional visitor experiences while supporting sustainable growth.



THE PROCESS

The Shellharbour DMP has been developed through a structured, evidence-based process to ensure it reflects current market conditions, local strengths, and stakeholder priorities. This process combines research, data analysis, industry and community engagement to inform a clear and achievable roadmap for tourism growth in Shellharbour. It provides opportunities for input, ensuring the final plan is well-informed, collaborative, and aligned with the region's long-term vision.

DESTINATION INSIGHTS:
Industry research and data analysis and product review.

DRAFT:
Shellharbour DMP for Council endorsement

STAKEHOLDER INSIGHTS:
Stakeholder Engagement and Information Gathering

PUBLIC EXHIBITION AND FEEDBACK:
from the community and industry.

FINAL SHELLHARBOUR DMP ADOPTED

DESTINATION SNAPSHOT

CURRENT TOURISM LANDSCAPE (DOMESTIC)

498,000 Annual Visitors*	**$213M** Annual Visitor Spend*		
391,000 Day Visitors*	**$152** Spend Per Day*	**$60M** Total Spend Per Day*	**$564** Spend Per Night*
102,000 Overnight Visitors*	**$215** Spend Per Overnight*	**$150M** Total Spend Overnight*	**$1,472** Spend Per Trip (avg. 5 days)*

** Avg YE 2024*

FUTURE AMBITIONS

Over the next ten years, Shellharbour will grow a high value, sustainable visitor economy, **increasing annual visitor spend to $320 million** by strengthening overnight visitation, supporting local jobs and protecting the coastal lifestyle, environment and our community values.

VISITOR SPEND
$213M
YEAR ENDING 2024

VISITOR SPEND
$260M
2030 | 5 YEAR FORECAST

VISITOR SPEND
$320M
2035 | 10 YEAR FORECAST

Based on a moderate growth scenario (about 2.5% annual visitation growth and 4–4.5% spend growth), reflecting current trends in yield and regional tourism performance.



VISION & OBJECTIVES

VISION

Shellharbour is a relaxed coastal region with vibrant precincts, a world-class marina, an airport alive with adventure tourism and aviation heritage, and protected nature reserves and wildlife.

OBJECTIVES

Shellharbour City Council delivers its tourism function through Destination Shellharbour, the organisation's dedicated tourism and visitor economy unit. Destination Shellharbour leads the visitor economy through marketing, industry support, partnerships and visitor servicing.

This work is supported by a broad range of Council functions that contribute to the visitor experience and destination appeal, including events delivery, arts and cultural programs, community development, infrastructure planning and delivery, strategic planning, and environmental management. Together, these functions help shape a vibrant, accessible and sustainable destination.

Destination Shellharbour works collaboratively across Council, with industry and community partners, and alongside regional and state organisations including Destination Sydney Surrounds South and Destination NSW, to strengthen Shellharbour's positioning and contribute to the growth of the broader Illawarra and South Coast visitor economy.

ROLES IN SUPPORTING VISITOR ECONOMY

Shellharbour City Council's **primary role is to enable and promote tourism activities** rather than deliver all outcomes directly. Council acts as a catalyst through strategic investments and partnerships, maximising impact through:

DESTINATION SHELLHARBOUR

- Visitor information servicing
- Shellharbour brand and marketing, including:
    - Destination Shellharbour website
    - Social media platforms
    - Digital marketing and public relations
    - Destination marketing and campaign development
    - Publication and collateral development
    - Digital asset library through photography and videography
- Visitor economy product development
- Shellharbour Tourism Partner Program
- Partnership facilitation connecting industry, community and government

COUNCIL

- Public infrastructure investment (ie roads, facilities, and accessible amenities)
- Council-owned and managed attractions and assets
- Placemaking
- Events and activations
- Public Spaces (beaches, parks, public art etc)
- Business enablement
- Event attraction and funding partnerships
- Community Engagement

TOURISM INDUSTRY

- Destination Sydney Surrounds South (DSSS)
- Australian Regional Tourism (ART)
- Shellharbour tourism business operators
- Neighbouring councils
- Albion Park Chamber of Commerce
- Event operators and coordinators

STATE AND NATIONAL GOVERNMENT AGENCIES

- Tourism Australia
- Destination NSW (DNSW)
- Crown Lands
- National Parks and Wildlife Service (NPWS)
- Transport for NSW (TfNSW)
- Regional Development Australia

This shared responsibility model creates a framework where growth is sustainable, realistic, and supported across the region. By clearly delineating roles:

- Council supports and facilitates
- Partners deliver experiences and investment
- The plan ensures accountability while fostering collaboration.

Regular engagement, transparent communication and aligned objectives enable all partners to work toward common destination goals while maintaining their distinct contributions to Shellharbour's tourism success.



MARKETING



SUPPORT



ADVOCACY



INFLUENCE

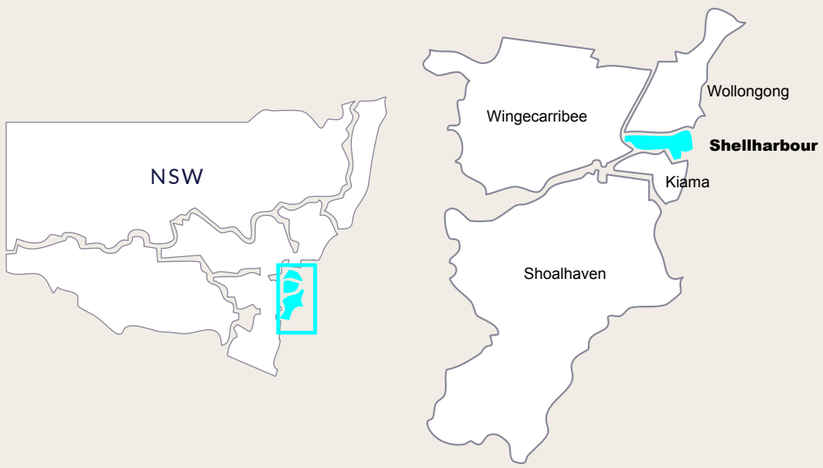
STRATEGIC FOCUS AREAS

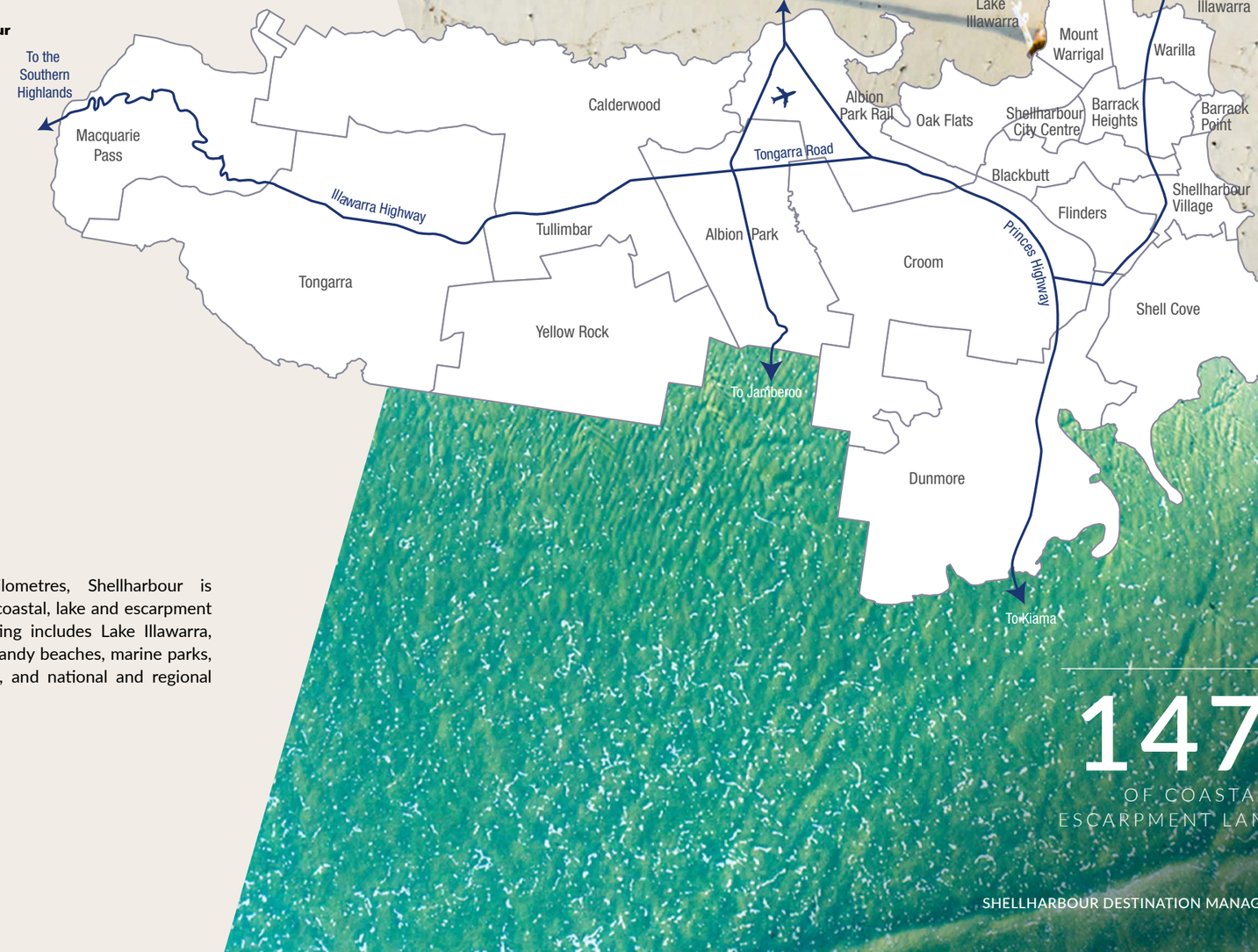
These are the focus areas that have been identified. They will enable the Shellharbour DMP's vision and objectives, **guiding the future of Shellharbour's visitor economy.**

DESTINATION POSITIONING & AWARENESS	Build a strong, distinctive Shellharbour brand and drive demand	• Brand awareness and consideration • Clear precinct positioning • Digital engagement and conversion • Strong destination storytelling
PRODUCT, EXPERIENCE & INDUSTRY DEVELOPMENT	Grow high-quality, bookable and accessible visitor experiences	• Bookable hero experiences and packaging • Tourism Partner Program • Operator capability, collaboration and digital readiness • Accessible and inclusive tourism • Data and insights
EVENTS ACTIVATION & NIGHT-TIME ECONOMY	Activate precincts and drive year-round visitation	• Signature and year-round events calendar • Off-peak visitation growth • Precinct activation • Cultural, arts and uniquely 'Shellharbour' events • Night-time economy development
VISITOR SERVICES & TOURISM INFRASTRUCTURE	Make it easy to visit, stay and move around	• Visitor services (including VIC) • Wayfinding, gateways and signage • Transport, access and connectivity • Accommodation growth and diversification • Accessible and sustainable infrastructure



DESTINATION CONTEXT







1.5
HOURS FROM SYDNEY

2.5
HOURS FROM CANBERRA

LOCATION & GEOGRAPHY

Shellharbour is a vibrant coastal city on Dharawal Country, located between the Illawarra Escarpment and the Tasman Sea on the NSW South Coast. Just over an hour south of Sydney and around 2.5 hours from Canberra, the city sits at the 'Heart of the Illawarra' Region, bordered by Wollongong to the north, Kiama and Shoalhaven to the south, and the Southern Highlands (Wingecarribee) to the west.

Covering 147 square kilometres, Shellharbour is shaped by a unique mix of coastal, lake and escarpment landscapes. Its natural setting includes Lake Illawarra, extensive foreshore areas, sandy beaches, marine parks, rainforest, rivers, waterfalls, and national and regional parks.

147km²
OF COASTAL & ESCARPMENT LANDSCAPE

CONNECTIVITY

Shellharbour is easily accessed by air, rail, road and sea, supporting seamless visitor movement.

AIR:
Shellharbour Airport enables private and charter access and aviation tourism, with a priority to secure a commercial airline partner for regular passenger services.

RAIL AND PUBLIC TRANSPORT:
Rail and bus networks connect Shellharbour to Sydney and surrounding regions, improving access without a car.

MARINA ACCESS:
Shellharbour Marina provides deepwater access for visiting vessels, supporting marine tourism and waterfront experiences.

ROAD ACCESS:
Located just over one hour from Sydney via the Princes Motorway, with future access to Western Sydney International Airport. Shellharbour is on the Grand Pacific Drive, an official tourist drive marked by Transport for NSW signage from Southern Sydney down to the Shoalhaven.

SHARED PATHWAYS:
Nearly 20 kilometres of coastal and lakefront pathways connect key destinations for walking, cycling and recreation.

VISITOR PROFILE

The Visitor Economy Snapshot provides an overview of Shellharbour's tourism performance, including visitation, spend, accommodation and economic contribution. It brings together key indicators to show how the visitor economy supports local jobs, businesses and community wellbeing, and informs future destination growth.

498K
VISITORS TO SHELLHARBOUR REGION

$213M
VISITOR SPEND

DOMESTIC

$60M Total spend (day)	391K Visitors (day)	$152 Spend per day
$150M Total spend (overnight)	102K Visitors (overnight)	$564 Spend per night
3.3 Length of stay (nights)	266K Stays (overnight)	$1472 Spend per trip

INTERNATIONAL

$3M Spend	5000 Visitors	$27 Spend per night
23.5 Length of stay (nights)	112K Stays (overnight)	$635 Spend per trip

ACCOMMODATION CAPACITY

1,449 Guests (Max sleep capacity)	411 Total keys	520 Total rooms	68 Accommodation providers

TOURISM VALUE

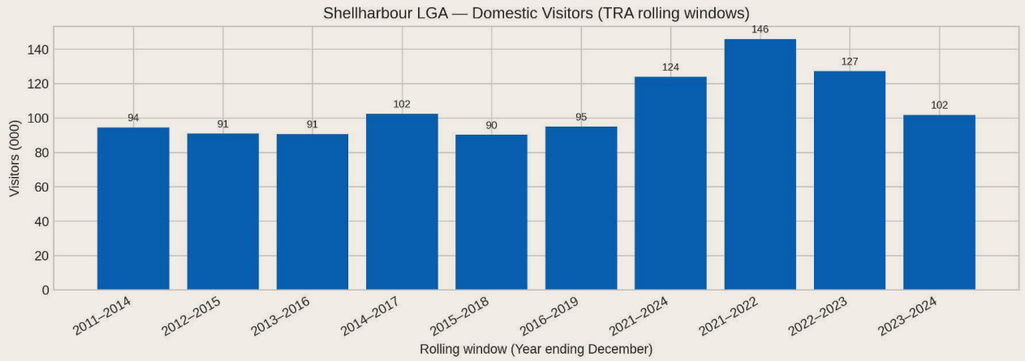
$102.8M Value added to the region	$55.26M Accommodation & Food services highest spend	1,054 Local jobs supported by tourism

CURRENT VISITATION TRENDS

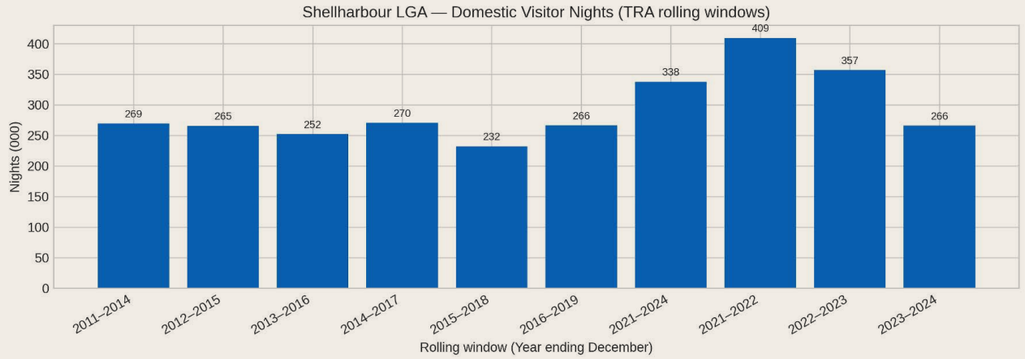
Shellharbour has a strong day trip market and high visitor spend, with fewer overnight visitors who are staying for shorter periods but spending more per trip, reflecting a shift to higher-value tourism and a clear opportunity to convert visitation into longer stays to increase economic return.

HISTORIC VISITATION TRENDS

TOTAL DOMESTIC VISITORS (2014 - 2024)



TOTAL DOMESTIC VISITORS NIGHTS (2014 - 2024)



TOTAL INTERNATIONAL VISITORS (2014 - 2024)



TOTAL INTERNATIONAL VISITORS NIGHTS (2014 - 2024)



Commbank iQ December 2024 * Travel Research Australia (TRA) referenced in Shellharbour DMP*
***** Destination Shellharbour LGA audit 2025 ***** Localis*

***Remplan – Source: ABS 2021 Census Place of Work Employment (Scaled), ABS 2022 / 2023 National Input Output Tables, ABS June 2024 Gross State Product, ABS 2023 / 2024 Tourism Satellite Account, TRA 2024 Tourism Profile, and REMPLAN 2024 Tourism Analysis Model.*

STAKEHOLDER INSIGHTS

To ensure the Shellharbour DMP reflects the needs and aspirations of the community, extensive engagement with a diverse cross section of stakeholders took place.

Participants included residents, business owners, tourism operators, young people, local Dharawal representatives, people with disability, visitors, and frequent users of Shellharbour from neighbouring areas.

Engagement took place over several months and used workshops, popups, online community engagement tool, newsletters, social media and targeted meetings to make it easy for people to be involved.



STAKEHOLDER ENGAGEMENT

ACTIVITY TYPE	EXAMPLES	TIMING
WORKSHOPS	Councillor workshop; Industry workshop; VIC workshop; Airbnb host session; Advisory committee sessions.	**JULY - OCT 2025**
COMMUNITY POP-UPS & IN-PERSON ENGAGEMENT	Eats & Beats activations; Aboriginal engagement meeting; Youth Summit	**SEPT - NOV 2025**
ONLINE PARTICIPATION & SURVEYS	Let's Chat online survey	**SEPT - OCT 2025**
NEWSLETTERS	Council; Tourism, and Industry newsletters	**SEPT - NOV 2025**
SOCIAL & DIGITAL MEDIA	Organic social posts; Paid social ads; Media articles	**SEPT - NOV 2025**
DISPLAYS & AWARENESS CHANNELS	VIC posters; Library displays; Civic Centre digital screens, Flyers with QR code to online survey	**SEPT - OCT 2025**

ENGAGEMENT SUMMARY

590
Total People Engaged

371
Survey Responders

140
Face-to-Face Workshop Attendees

48
Tourism Industry Survey Responders

WHAT WE HEARD

Through comprehensive consultation with our community, visitors and tourism stakeholders we heard consistent messages about what people value, what needs attention, and what they hope Shellharbour can become. The themes below reflect the main opportunities, issues and aspirations shared across the community and industry.

“Grow tourism - but only if Shellharbour stays easy, affordable, inclusive, and nature led.”

KEY THEMES

These insights directly informed Shellharbour DMP priorities and actions, ensuring community values are embedded throughout the strategic framework.

NATURE-BASED AND SUSTAINABLE

- Emphasis on beaches, Lake, Bass Point and escarpment as defining assets
- Growth of nature-based tourism, trails and eco experiences
- Environmental stewardship
- Desire to remain relaxed, community-focused
- Managing tourism impacts

Key opportunity: Protect and leverage Shellharbour's natural assets while supporting sustainable tourism that respects community values, lifestyle and environmental limits.

DESTINATION AWARENESS AND POSITIONING

- Currently lower recognition vs nearby destinations
- Need for clearer branding and storytelling

Key opportunity: Elevate Shellharbour as a recognisable, competitive coastal destination.

VISITOR EXPERIENCE AND ACTIVATION

- More events, night-time economy, youth activities
- Limited evening activity currently
- Desire for vibrant precincts

Key opportunity: Expand from a daytime destination to a year-round, day-to-night experience economy.

ACCOMMODATION AND OVERNIGHT GROWTH

- Gaps in accommodation diversity
- Need to support the new hospital, workers and visitors
- Aspiration to increase overnight stays

Key opportunity: Grow accommodation capacity and variety to encourage longer stays and capture visitor spend.



KEY THEMES

CULTURAL IDENTITY AND STORYTELLING

- Aboriginal (Dharawal) cultural experiences
- Heritage and local character
- Low awareness of Shellharbour's identity

Key opportunity: Strengthen a distinct, authentic sense of place through culture, stories and identity.

KEY THEMES

ECONOMIC DEVELOPMENT AND INDUSTRY COLLABORATION

- Business collaboration, packaging, marketing
- Need to strengthen visitor economy
- Supporting local operators

Key opportunity: Build a coordinated, competitive tourism ecosystem through partnerships and shared promotion.

CONNECTIVITY AND GETTING AROUND

- Transport gaps (bus, train, coastal access)
- Need for shuttle services and better links
- Cycling and walking connections
- Wayfinding and ease of movement

Key opportunity: Make Shellharbour easy to navigate with or without a car through integrated, connected transport and active travel networks.

ACCESSIBILITY AND INCLUSION

- Accessible infrastructure (paths, ramps, crossings, facilities)
- Inclusive public spaces and experiences
- Barriers in mobility and visitor access

Key opportunity: Position Shellharbour as a highly accessible, inclusive destination for all ages and abilities.

INFRASTRUCTURE INVESTMENT

- Parking wayfinding and accessibility
- Footpath gaps and safety issues
- Shared path conflicts (e-bikes, scooters)

Key opportunity: Manage growth through better infrastructure planning and visitor flow management.



TRENDS INFLUENCING DEMAND

Shellharbour's demand profile sits within broader NSW trends and regional context. Across the state there's a clear shift toward experience-led, high-value travel, stronger sustainability expectations, bigger roles for events, and more data-driven marketing. **NSW is targeting $91 billion in visitor spend by 2035**, supported by more flights, accommodation and better data.



EXPERIENCE SEEKERS AND CULTURE. Travellers are choosing immersive, authentic experiences over sightseeing. NSW highlights "experience seekers" and Aboriginal cultural tourism as priority themes. This fits Shellharbour's strengths across Killalea, Bass Point, whale watching and coastal trails, and supports packaging nature, culture and local produce into bookable experiences.

SHORT BREAKS AND THE 200 KM DRIVE MARKET. DSSS identifies the 200 km drive market as a primary target, with a focus on converting day trips to overnight stays through better itineraries and packaging. Regional NSW is expected to shoulder a large share of growth, so dispersal and length of stay matter. Shellharbour's proximity to Sydney and Canberra positions it well for repeat short breaks.

EVENTS TO SMOOTH SEASONALITY. State and regional strategies call out leisure and business events to drive year-round demand. Our community feedback backs this up, asking for more live music, markets and night-time activity around Shellharbour Marina, Shellharbour Village and Lake Illawarra to extend stays in the shoulder and winter months.

SUSTAINABILITY AND INCLUSION ARE NOW BASELINE. DNSW embeds sustainability and accessibility in demand growth. DSSS flags "green" and "conscious" travel as mainstream. Locally, residents want careful protection of beaches, Bass Point and Lake Illawarra, cleaner waterways, more shade and smarter waste systems. They also ask for accessible accommodation and paths, inclusive events and better beach access so everyone can enjoy our places.

CONNECTIVITY SHAPES CHOICES. DNSW is investing in access, including EV-friendly road trips, but local movement still shapes the visitor experience. Problems arise with lack of connectivity including infrequent buses, limited links between rail stations and the rest of the city, gaps in walking and cycling connections and parking wayfinding at hotspots. Considerations for shuttle loop, stronger wayfinding and safer paths can lift dispersal and satisfaction.

DIGITAL DISCOVERY AND DATA-LED TARGETING. DNSW's data platform and push for digital storytelling create a chance to target high-value segments and promote bookable experiences with more precision. With a focus on attracting national and international visitors, it is integral that tourism operators are working online with bookable product and marketing that can track data leading to valuable insights. Community input also notes Shellharbour's need to lift its profile against better known neighbours, making consistent content, offers and partnerships critical.

TRAVELLERS FOR HEALTH. With the new Shellharbour Hospital, health-related stays and visiting friends and relatives (VFR) linked to treatment will contribute to midweek and shoulder season demand, especially if paired with accommodation close to The Links Shell Cove and Shellharbour Marina.

What this means. Focus on immersive coastal and cultural products, an events calendar that fills the offseason, protection and activation of natural places, easier car-free movement, access for all, and smarter, data-led marketing. Together, these moves align Shellharbour with state and regional priorities while reflecting what our community told us matters most.

MOTIVATIONAL DRIVERS

New Visitors These are the strongest reasons first-time visitors choose Shellharbour.

FAMILY FRIENDLY COASTAL AND WATER ACTIVITIES: Accessible ocean pool, Lake Illawarra Entrance, calm foreshores, patrolled beaches, playgrounds, shared paths, markets, relaxed dining and family entertainment precincts.

SHORT BREAKS AND TOURING STOPOVERS: A key destination for the 200 km drive market and major touring routes (Grand Pacific Drive and East Coast trips), with many visitors staying one to two nights as a short break or stopover.

ADVENTURE TOURISM (MARINE AND AVIATION): Boating, diving and snorkelling, joy-flights, skydiving over the Marina, aviation heritage at HARS, airshows and Shellharbour Airport.

CULTURE AND HERITAGE: Aboriginal cultural experiences, art trails, and museums including aviation history at HARS.

NATURE AND BUSHWALKING: Escarpment bushwalks, waterfall hikes and nature watching (birds and seasonal fireflies). Wildlife around Lake Illawarra of birds, seals and occasional penguins. Bushrangers Bay offers snorkelling and diving. Whale watching during Whale Season from every coastal vantage point, or up close on a cruise from Shellharbour Marina.



Repeat Visitors These are the factors that bring people back and keep them longer.

RETURN TO NATURE ROUTINE: Coastal walks, ocean swims, Lake Illawarra, regional and national parks to enjoy across seasons.

VISITING FRIENDS & RELATIVES (VFR) AND LOCAL LIFESTYLE: Staying with VFR hosts, enjoying local rhythms, familiar spots, regular markets, community events, and everyday community life.

SPORT & RECREATION WEEKENDS: Golf at The Links Shell Cove, stand-up paddle boarding and kayaking on the lake, lawn bowls, basketball, pickleball, cricket, football, cycling, diving and fishing.

NIGHT-TIME & SEASONAL EXPERIENCES: Shellharbour Marina and Shellharbour City Centre, Shellharbour Village, Eats and Beats Street Festivals, live music, markets and signature activations such as the Enchanted Forest that extend stays beyond summer.

FLYERS & SAILORS: Repeat visitation for people who regularly fly (private) into Shellharbour Airport and use Shellharbour Marina for mooring their marine vessel.

EASY, GOOD VALUE REPEATS: Driveable access, growing accommodation near the Marina and The Links Shell Cove, and flexible itineraries that mix beach time with food and culture.



IMPLICATIONS FOR THE DESTINATION

The trends and motivational patterns point to Shellharbour needing to strengthen online bookable experiences, build an events calendar that draws visitors year-round and protect the natural places at the heart of our appeal.

Improved access and movement, including car-free options, better wayfinding and easier links between transport nodes, will shape satisfaction and dispersal. Growth in accessible tourism, sustainability expectations, and health-related travel means Shellharbour must prioritise inclusive design, environmental care and accommodation options near major precincts such as Shellharbour Marina, coastal zones, and near the new Shellharbour Hospital.

Digital visibility, consistent storytelling and partnerships will be key to lifting the city's profile in a competitive region.

PRODUCT MIX: STRENGTH & GAPS

Shellharbour's tourism product mix reflects a **strong foundation in nature-based and self-guided experiences,** including beaches, coastal walks, national parks and lake-based activities. These assets **align well with current visitor demand** and underpin the destination's appeal.

However, the mix remains weighted toward passive experiences (free), with guided, curated and higher-yield (bookable) products such as **tours, cultural, heritage and wellness offerings representing only around 15–20% of the market.** This presents an opportunity to broaden the experience offering, increase yield and convert visitation into longer stays.

HERO PRODUCT

Coastal & nature-based experiences *(beaches, Killalea, Bass Point, Lake Illawarra)*

Family-friendly, safe and accessible coastal environments

Strong short-break and 200km drive market appeal

Adventure tourism *(marine, aviation, skydiving, surfing, water sports)*

Aviation & heritage assets *(HARS Aviation Museum, Illawarra Light Railway Museum)*

Wildlife & seasonal experiences *(whale watching, birdlife, seals, fireflies)*

Established events, lifestyle and marina precinct activation

Strong Visiting Friends & Relatives (VFR) market and repeat visitation

EMERGING STRENGTHS

Shellharbour Marina, Shellharbour Airport and The Links Shell Cove as premium precincts

Aboriginal cultural tourism & storytelling

Events & night-time economy

Health & VFR-related stays linked to the new Shellharbour Hospital

Wellness experiences & coastal wellbeing

Growing accommodation, including higher-end product

Active transport (coastal walks, cycleways, shared paths)

Sport & recreation assets



GAPS » OPPORTUNITIES

Limited bookable & packaged experiences » Develop curated, multi-day experiences

Short length of stay » Convert day trips to overnight, through itineraries & events

Seasonality & limited night-time economy » Build a strong year-round events calendar & signature off-season event

Transport & connectivity gaps » Improve wayfinding, links between precincts & explore shuttle solutions

Lake Illawarra underutilised » Activate with recreation, events, water hire & foreshore improvements

Accessibility gaps » Embed inclusive design across paths, facilities, events & experiences

Digital visibility & bookability » Strengthen online presence, operator capability and storytelling

Accommodation mix and location gaps » Grow supply aligned to Marina, coast and hospital precincts

Limited agri-tourism and rural experiences » Expand farm-based product

Reliance on volunteer-led attractions » Support capacity, consistency and sustainability of key assets

Environmental pressure on key sites (Bass Point, Killalea, Lake foreshore) » Balance access with protection



TARGET MARKET

Based on research and data, the following primary and secondary target markets have been identified:

PRIORITY GEOGRAPHIES

Shellharbour's core markets are within the 200 km drive catchment, particularly Greater Sydney, Western Sydney and Canberra. These markets deliver strong short-break, daytrip and repeat visitation, supported by road access and alignment with state strategies.

Interstate visitors from Victoria and Queensland are important for longer stays and higher spend.

International visitation is rebuilding, with growth expected from VFR, Western markets (UK, USA, NZ) and key Asian markets. Shellharbour is well placed to benefit due to its proximity to Sydney and strong nature and coastal appeal.

Regional daytrip markets (Wollongong, Kiama, Shoalhaven, Wingecarribee and Sutherland) continue to support consistent visitation and spend.

PRIORITY SEGMENTS

EXPERIENCE SEEKERS: Drawn to nature, marine, adventure and outdoor experiences across the coast, lake and escarpment.

EVENT VISITORS: Travel for sport, lifestyle and cultural events, driving peaks in visitation and spend.

VISITING FRIENDS AND RELATIVES (VFR): A consistent, year-round market supporting accommodation, retail and dining.

FAMILIES: A dominant segment, particularly from Western Sydney and the ACT, attracted to safe, coastal and outdoor experiences.

BUSINESS EVENTS: A growing, high-value segment supporting midweek and shoulder season demand.

SEASONALITY & DEMAND

PEAK (SUMMER AND SCHOOL HOLIDAYS): Highest visitation driven by beaches, lake activity and coastal precincts, with pressure on parking and infrastructure.

SHOULDER (AUTUMN AND SPRING): Ideal conditions for walking, cycling, golf and events, presenting strong opportunities to extend stays.

LOW (WINTER): Lower overall demand, supported by VFR, aviation tourism and nature-based visitors.

WHALE SEASON (MAY–NOVEMBER): A key off-peak drawcard, supporting coastal visitation and seasonal dispersal.



DEMAND DISTRIBUTION

- Coastal areas peak in summer
- Retail and dining perform year-round
- Marina and event precincts fluctuate with seasons and programming
- Regional visitors provide consistent cross-LGA flow

Opportunities exist to further disperse visitors to Lake Illawarra, Shellharbour Village, the Airport precinct and hinterland areas.

ACCESS & EXPERIENCE CONSIDERATIONS

- Congestion and parking wayfinding in peak periods
- Limited public transport connections to key visitor areas
- Gaps in walking and cycling links
- Seasonal pressure on infrastructure and natural areas



FUTURE GROWTH MARKETS

PREMIUM LEISURE TRAVELLERS: Linked to new Shellharbour Marina, Shell Cove and hotel development

HEALTH-RELATED TRAVEL: Driven by the new Shellharbour Hospital

INTERNATIONAL VFR: Growth via Western Sydney International Airport

BLEISURE TRAVELLERS: Combining business and leisure stays

WELLNESS VISITORS: Coastal and nature-based retreat experiences

SPORTS TOURISM: Leveraging existing facilities and natural assets

EDUCATION & TRAINING: Aviation, marine, health and environmental sectors

VISITOR ECONOMY FORECAST

Shellharbour's visitor economy is set for steady and sustainable growth over the next decade, building on its strong day visitor market while increasing overnight stays and visitor spend.

From a current baseline (2025) of approximately **498,000 visitors and $213 million** in annual expenditure, visitation is projected to grow:



This growth will be driven by a clear focus on:

CONVERTING DAY VISITORS INTO OVERNIGHT STAYS

ENCOURAGING LONGER STAYS

ATTRACTING HIGHER-YIELD VISITORS SPENDING ON BOOKABLE EXPERIENCES

This represents a shift from volume-led growth to a more value-driven visitor economy, delivering stronger economic outcomes for local businesses and the community.

DETAILED STRATEGIC FOCUS AREAS

Four Strategic Focus Areas have been identified for the Shellharbour DMP. These are the focus areas that will enable the region to achieve the Shellharbour DMP's vision and objectives, which will ultimately guide the future of Shellharbour's visitor economy.

The Strategic Focus Areas will enable the Shellharbour DMP's vision and objectives, guiding the future of Shellharbour's visitor economy. They focus areas respond to identified product gaps, visitor demand trends and community priorities, and will guide coordinated action across Council, industry and partners.

DESTINATION POSITIONING & AWARENESS

PRODUCT, EXPERIENCE & INDUSTRY DEVELOPMENT

EVENTS ACTIVATION & NIGHT-TIME ECONOMY

VISITOR SERVICES & TOURISM INFRASTRUCTURE

FOCUS AREA 1:
DESTINATION POSITIONING & AWARENESS

This focus area is dedicated to strengthening Shellharbour's identity, improving market awareness and driving conversion in key markets. In a highly competitive Sydney surrounds market, a clear and differentiated position is critical to attracting visitors and increasing share.

CLEAR DESTINATION BRAND
A strong and consistent destination brand is essential to define what makes Shellharbour unique. This includes articulating the city's coastal lifestyle, natural assets, experiences and personality in a way that resonates with priority markets. A clear brand position underpins all marketing, communications and visitor touchpoints.

DIGITAL MARKETING AND STORYTELLING
Digital channels are central to reaching and converting target audiences. Targeted campaigns, social media and search marketing will be supported by strong storytelling that brings Shellharbour's experiences to life. Authentic content, local voices and high-quality visuals will strengthen engagement and inspire travel.

REGIONAL COLLABORATION
Partnerships with Destination NSW, Destination Sydney Surrounds South and neighbouring councils will maximise reach and impact. Positioning Shellharbour within regional itineraries and touring routes strengthens visibility and makes it easier for visitors to include the destination in their plans.

INDUSTRY ALIGNMENT
A unified message across all operators and stakeholders is essential. Industry will be supported through toolkits, workshops and ongoing communication to ensure consistent branding, messaging and targeting across all channels.



FOCUS AREA 2:
PRODUCT, EXPERIENCE & INDUSTRY DEVELOPMENT

This focus area focuses on strengthening the depth, quality and commercial readiness of Shellharbour's tourism offer. While the destination has strong foundational assets, further development is needed to increase yield and support overnight visitation.

NATURE-BASED AND COASTAL EXPERIENCES
Shellharbour's beaches, coastline, Lake Illawarra and escarpment provide a strong base for nature tourism. Support nature tours and coastal activations.

FOOD AND LOCAL PRODUCE TOURISM
There is an opportunity to better showcase local produce and connect visitors with regional food experiences.

CULTURAL AND ABORIGINAL EXPERIENCES
Working in partnership with the Dharawal community, cultural tourism opportunities can be expanded through storytelling, interpretation and Indigenous-led experiences. This will strengthen identity and add depth to the visitor experience.

ACCOMMODATION DIVERSITY
Expanding accommodation supply across a range of price points is critical to increasing overnight stays.

COMMERCIALLY BOOKABLE PRODUCTS
Increase the number of bookable experiences. Supporting operators to develop, package and distribute their products through online channels will improve online awareness (SEO & AI), convenience and visitor spend.

COUNCIL'S FACILITATION ROLE
Council's role is to enable and support industry rather than directly deliver products. This includes providing infrastructure, planning support, marketing platforms and business development programs to encourage private sector investment and growth.



FOCUS AREA 3:

EVENTS ACTIVATION & NIGHT-TIME ECONOMY DEVELOPMENT

This focus area positions events and activation as key drivers of visitation, vibrancy and seasonal balance. A stronger events offering will support longer stays, increased spend and a more dynamic destination.

EVENTS AS A DEMAND DRIVER

Events will be used strategically to attract visitors, particularly during shoulder and off-peak periods. A coordinated annual calendar will support consistent visitation across the year.

ENABLING AND FACILITATING EVENTS

Council will adopt an enabling role, making it easier for industry, promoters and community groups to deliver events. This includes streamlined approvals, access to infrastructure and clear processes.

SIGNATURE AND SEASONAL EVENTS

Developing distinctive, Shellharbour-specific events will help differentiate the destination and build recognition. A focus on off-season events will support visitation during quieter periods.

NIGHT-TIME ECONOMY

Expanding after-dark activity is a priority, including live music, markets, dining experiences and cultural programming. Activating key precincts at night will improve visitor experience and increase length of stay.

PRECINCT ACTIVATION

Events and activation will focus on key precincts including Shellharbour Marina, Shellharbour Village and Lake Illawarra, creating vibrant, connected visitor hubs.



FOCUS AREA 4:

VISITOR SERVICES & TOURISM INFRASTRUCTURE DEVELOPMENT

This focus area ensures Shellharbour is easy to access, navigate and experience. High-quality infrastructure and services are essential to visitor satisfaction and support industry growth.

VISITOR SERVICES

Visitor services, including the Visitor Information Centre (VIC), play an important role in supporting trip planning and enhancing the visitor experience, both in-person and digitally through recommended itineraries and regional dispersal.

WAYFINDING AND SIGNAGE

Clear, consistent wayfinding and signage will help visitors navigate the destination, discover attractions and move easily between precincts.

TRANSPORT, ACCESS AND CONNECTIVITY

Improving connections between transport nodes and key visitor areas.

VISITOR AMENITIES AND PUBLIC SPACES

Upgrading amenities such as toilets, parking, beach access and public spaces will improve comfort and usability.

ACCESSIBLE AND SUSTAINABLE INFRASTRUCTURE

All infrastructure development will prioritise accessibility, inclusion and environmental sustainability, ensuring the destination remains welcoming and resilient.

KEY VISITOR PRECINCTS

Shellharbour's visitor experience is anchored by key locations, including:

- Marina and Waterfront: boating, dining, accommodation, boardwalks, wellness and coastal activities
- Bass Point and Killalea: marine reserves, snorkelling, diving, surfing, bushwalking, camping (Killalea) and cultural heritage
- Shellharbour Village: coastal village charm, boutique retail, dining, foreshore parks and events
- Albion Park and Airport: aviation attractions, adventure tourism, sporting facilities and regional connections
- Rural Hinterland and Macquarie Pass: rainforest, waterfalls, lookouts, wildlife, farms and scenic drives

These precincts provide the foundation for future activation, investment and visitor experience development. Each precinct plays a distinct role in supporting Shellharbour's transition to an overnight destination, providing opportunities for extended visitor stays, regional dispersal, increased spend, and future experience development.

GROWTH ENABLERS & INVESTMENTS

Delivery of the Strategic Focus Areas are supported by key enablers:

Accommodation development to support overnight visitation

Product and experience development

Events and activation across all seasons

Industry capability and collaboration

Priority investment areas include:

Coastal and Lake Illawarra access and activation

Visitor amenities and infrastructure

Event infrastructure and adaptable spaces

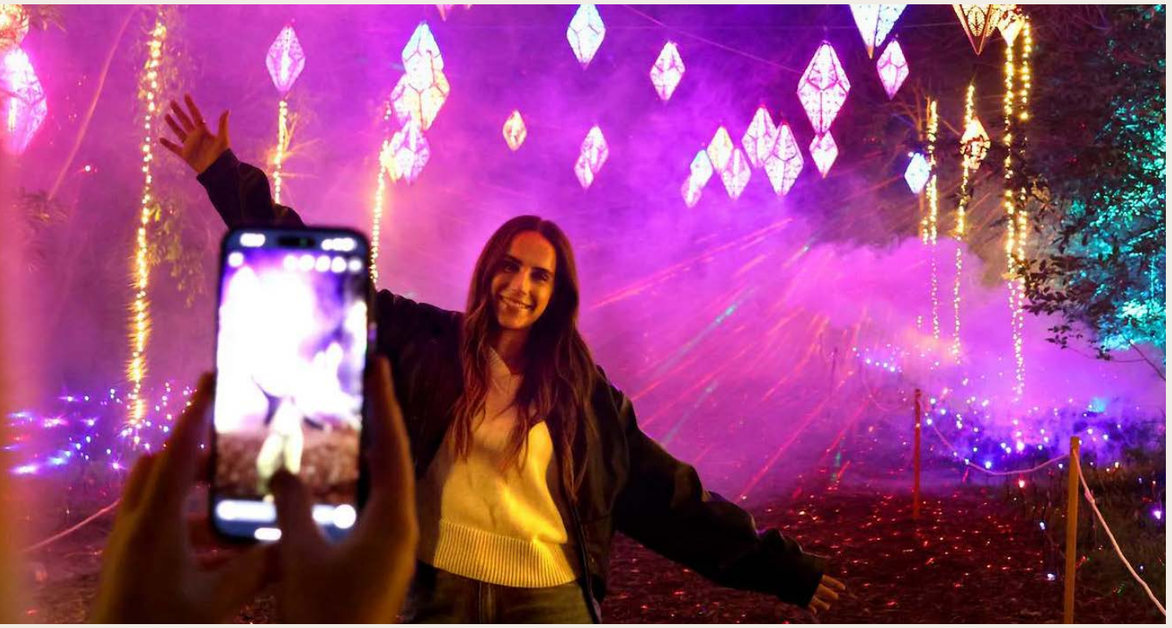
Public realm and precinct improvements

Wayfinding, signage and connectivity

A co-ordinated approach to investment, **supported by Council, government funding and private sector partnerships**, will ensure that infrastructure supports both visitor experience and community benefit.

PERFORMANCE FRAMEWORK

The Shellharbour DMP employs a performance measurement approach that prioritises quality of visitation over volume. Success is measured not simply by visitor numbers, but by the value generated through tourism activity and its positive contribution to the local economy and community.



VISITOR ECONOMY - Indicators & Targets

INDICATOR	CURRENT BASELINE (2025)	2030 TARGET	2035 TARGET	DATA SOURCE
TOTAL VISITORS	498,000	570,000	640,000	TRA
OVERNIGHT VISITORS	102,000	120,000	147,500	TRA
DAY VISITORS	391,000	450,000	495,000	TRA
VISITOR EXPENDITURE (TOTAL)	$213M	$260M	$320M	Spend Data & TRA
SPEND PER OVERNIGHT TRIP	$1,472	$1,650	$1,850	Spend Data & TRA
AVERAGE LENGTH OF STAY	3.3 Nights	3.65 Nights	4 Nights	TRA
TOURISM OPERATOR PARTICIPATION	60 - 65%	70 - 75%	75 - 80%	Industry Surveys
COMMUNITY SENTIMENT SCORE	72 - 75% positive	78 - 80% positive	80 - 85% positive	Community Surveys

Baseline figures are derived from broader Tourism Research Australia datasets and reflect total visitor expenditure across the LGA. Forecast projections are based on a moderate growth scenario, assuming average annual visitation growth of approximately 2.5% and visitor expenditure growth of approximately 4-4.5%, reflecting current trends in yield improvement and regional tourism performance. Actual outcomes may vary based on external factors including economic conditions, infrastructure investment, aviation access and market demand.

IMPLEMENTATION & GOVERNANCE

IMPLEMENTATION

Delivery of the Shellharbour DMP will require coordinated action across Council, industry and key stakeholders, supported by clear governance, defined priorities and ongoing monitoring. A structured review process will ensure the Shellharbour DMP remains responsive to changing market conditions, community expectations and environmental considerations over the ten-year period.

Implementation will be guided by a performance framework that includes regular reporting through Council processes, ongoing industry engagement and consultation, and annual stakeholder forums to review progress and priorities. Targets are indicative and will be refined over time as new data becomes available and conditions evolve.

The framework emphasises continuous improvement, learning and adaptation rather than strict adherence to fixed targets.

This recognises the dynamic nature of the visitor economy and the need to respond to emerging opportunities and challenges. Ongoing monitoring of community sentiment will ensure tourism growth remains aligned with local values and expectations.

GOVERNANCE

A clear governance framework guides delivery of the Shellharbour DMP, ensuring accountability and responsiveness while maintaining flexibility to adapt to changing conditions.

REGULAR REPORTING THROUGH COUNCIL PROCESSES

The Shellharbour DMP integrates into Council's reporting frameworks for consistent monitoring. Quarterly updates to the Executive Leadership Team track implementation progress and key indicators. Annual Council reporting provides comprehensive achievement overviews. IP&R integration ensures alignment with Council objectives and community priorities.

INDUSTRY ENGAGEMENT & UPDATES

Industry engagement is essential to success. An industry reference group provides strategic guidance through regular meetings. Operator briefings communicate progress and market intelligence while gathering frontline feedback. Collaborative planning sessions bring together Council, partners, and stakeholders to co-design initiatives and ensure shared ownership.

ONGOING MONITORING & REVIEW

Continuous monitoring ensures relevance. Performance tracking monitors visitation, economic impact, visitor satisfaction, and jobs supported by tourism. Market intelligence monitoring tracks emerging trends and preferences. Annual reviews assess progress and ensure market alignment while maintaining responsiveness to community feedback and changing conditions.

This governance structure balances accountability with flexibility, ensuring Shellharbour's destination management remains agile, evidence-based, and aligned with industry best practice and community values.

ACTION PLAN

This Shellharbour DMP is supported by a separate Action Plan that outlines the specific initiatives required to deliver the Shellharbour DMP's strategic priorities. The Action Plan identifies immediate (1 year), short-term (3–5 years) and long-term (5–10 years) actions, along with indicative responsibilities, timeframes and measures of success. It is designed as a flexible, working document that can be reviewed and updated regularly in response to changing market conditions, emerging opportunities and Council priorities.

This approach ensures the Shellharbour DMP remains strategic and enduring, while enabling responsive, transparent and accountable implementation over time.

REFERENCES

These sources collectively inform the strategic direction, evidence base, and implementation approach of the Shellharbour DMP 2025–2035.

Tourism Research Australia (TRA) - Regional Tourism Data, Year Ending 2024

NSW Visitor Economy Strategy 2030/2035 - Destination NSW

Destination Sydney Surrounds South Regional Tourism Strategy - Destination Sydney Surrounds South

Shellharbour Community Strategic Plan 2022-2032 - Shellharbour City Council

Shellharbour Destination Management Plan Community Engagement Report 2025 - Shellharbour City Council. This comprehensive engagement program included 590 participants, with 371 survey responses and 140 workshop attendees providing valuable insights into community perspectives on tourism development.

NSW Government Visitor Economy Taskforce Reports - Analysis of visitor economy trends, challenges, and opportunities for regional destinations in New South Wales.

Australian Tourism Data Warehouse (ATDW) Product Listings - Comprehensive database of tourism products and attractions across Australia, providing insights into regional tourism offerings.

Local Government NSW Tourism Policy Frameworks - Guidelines and best practices for local government tourism planning and destination management.

Destination Management Planning Guidelines - Australian Standing Committee on Tourism. National framework for developing effective destination management plans.

Guide to Best Practice in Destination Management - developed by the Australian Regional Tourism (ART). This ensures Council can support visitor economy growth and sustainability by considering all destination management needs.

APPENDICES

The following appendices provide supporting documentation and detailed implementation guidance for this Shellharbour DMP.

Appendix A - Visitor Economy Data
Ten-year visitation trends, day vs overnight breakdown, visitor spend by segment, yield metrics, and international patterns. Source: Tourism Research Australia.

Appendix B - Stakeholder Engagement
Summary of 590 participants engaged: 371 survey responses, 140 workshop participants, 48 industry respondents. Includes engagement methods and key consultation themes.

Appendix C - Strategic Alignment
Alignment mapping with NSW Visitor Economy Strategy 2035, Destination Sydney Surrounds South, Council strategic plans, and IP&R Framework integration.

Appendix D - Product and Experience Insights
Comprehensive audit of strengths (nature, marine, aviation assets), gaps (tours, wellness, cultural experiences), and emerging opportunities in eco-tourism and culinary experiences.

Appendix E - Detailed Action Plan
Full initiative list across four key strategic focus areas, implementation timeframes with quarterly milestones, roles and responsibilities for lead organisations, and funding considerations including budget estimates and partnership opportunities.

These appendices are living documents updated annually to reflect new data, market conditions, and implementation progress.





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