Phillip Island & San Remo
Visitor Economy Strategy 2035

SITUATION ANALYSIS SNAPSHOT

August 2023

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Glossary

BCSC - Bass Coast Shire Council
DJSIR - Victorian State Government Department of Jobs, Skills, Industry and Regions
DMP - Destination Management Plan
DPI - Destination Phillip Island
GSTC - Global Sustainable Tourism Council
PINP - Phillip Island Nature Parks
PIVIC - Phillip Island Visitor Information Centre
RTB - Regional Tourism Board
VEP - Visitor Economy Partnerships
VES2035 - Phillip Island & San Remo Visitor Economy Strategy 2035
VFR - Visiting Friends and Relatives

We acknowledge the traditional custodians of this land, the Bunurong people and pay respects to their elders past, present and emerging and to all Aboriginal and Torres Strait Islander people living in our community today.

Phillip Island is known by its Traditional Owners, the Bunurong, as Millowl.

Executive Summary

Tourism is widely recognised as a vital lifeline for the Phillip Island and San Remo community; providing financial stability, enabling a dynamic and vibrant destination and enhancing the overall quality of life for residents.

Renowned for its pristine beaches, enriching landscapes, abundant wildlife encounters, and nostalgic summer getaways, Phillip Island and San Remo have created lasting memories for a diverse mix of visitors for over a century.

Achieving a net positive impact for the local economy, environment and communities is a consistent goal for tourism from all stakeholders, and this situation analysis snapshot uncovers many opportunities to ensure Phillip Island and San Remo remains a special place for all, for generations to come.

Tourism remains critical to the fabric of the destination and communities within, contributing enormously to the sustainability of the local economy; setting the foundation for business success, and the creation of jobs for generations of families.

Speaking to the importance of the sector from an economic perspective, as at 2021/22 tourism accounts for 26.8% of Regional Gross Regional Product (GRP) and 39.3% of direct-filled jobs, making Phillip Island and San Remo the most tourism-reliant region in Victoria, and the fourth most tourism-reliant destination in Australia, behind Lasseter (Central Aus), Kangaroo Island (SA) and East Coast (TAS)^.

Predominantly trading on its diverse and finite environmental assets to drive demand for visitation, the region has an ongoing challenge of maintaining the balance between supporting a sustainable economy for the many businesses and workers, along with protecting and preserving the natural environment and way of life for locals.

Many locals enjoy a special connection with the region's natural profile and have a strong commitment and track record of preserving and regenerating local flora and fauna over many decades. They understand and are incredibly aware of the vulnerabilities that exist between growing tourism for the economic gains, whilst caring for place, and are fierce advocates for a balanced, regenerative approach to tourism.

In 2016, Bass Coast Shire Council (BCSC), in partnership with destination stakeholders, developed a long-term, sustainable Visitor Economy Strategy for Phillip Island and San Remo 2035 (VES2035) to enable the community's aspiration.

In early 2023, upon the launch of the new Experience Victoria 2033 Strategy, and the rollout of the recommendations of the Regional Tourism Review undertaken in 2019, it was determined by the Victorian State Government that all Destination Management Plans require realignment to enable a cohesive and consistent approach to destination management across the state.

This requires a review of the VES2035 and the development of an updated Strategy that not only aligns with State Government guidelines but also recalibrates the opportunities as a whole for tourism, reflecting the complex operating environment, and uncovers ways to align all efforts across the region, and refocus priorities for the forthcoming years.

This document is a snapshot of an extensive listening process and draws a line in the sand to determine opportunities that stakeholders have uncovered together. These considerations will form the basis of the opportunities in the Destination Management Plan.

From here, the community and industry are invited to share their thoughts on this document via email and stakeholder workshops. Your feedback on this document will help inform the priorities and focus areas to be included in the updated Destination Management Plan for Phillip Island and San Remo.

^Regional comparison data available from https://www.tra.gov.au/regional/tourism-regional-profiles, sheet GVA&Employment, only looking at 2019/2020 data

Introduction

Project Background

The travel ecosystem has endured incredible volatility; initially with the impact of COVID19 and natural disasters, which is now manifesting across many supply and demand side systemic challenges.

Through all of that, destination stakeholders within the Phillip Island and San Remo communities have remained staunch in their commitment to driving positive change across the region.

To continue to map a course that reflects the new, complex operating environment, the timing is right to review and update the *Phillip Island and San Remo Visitor Economy Strategy 2035* to reconfirm the community's aspirations for tourism, and draw on relevant and valid data and insights to determine a path forward.

In 2016, Bass Coast Shire Council (BCSC), in partnership with destination stakeholders, developed a sustainable long-term Visitor Economy Strategy for Phillip Island and San Remo 2035 (VES2035).

The goal for the Strategy was to help ensure the long-term viability and sustainability of the tourism sector and recognises the importance of both the community and the natural environment in achieving this outcome.

Underpinned by comprehensive consultation and engagement a bold co-created ambition was uncovered, for P*hillip Island is recognised nationally and globally as a world-leading sustainable tourism destination, where tourism is embraced by the community*.

Sustainable and regenerative *Objectives* were determined across Community, Environment and Economy, and *Guiding Principles* were agreed upon by the stakeholders in good faith to progress the ambition of the Plan.

Within the Strategy, *five Strategic Directions* were determined to deliver the vision, with each direction outlining at least one 'Game Changer Project' and supporting strategies for delivery over the 20-year period.

A *Measurement Framework* outlined nine Key Performance Indicators which aligned with the Objectives and Five Strategic Directions.

Key Performance Indicators (KPIs) were established to align with the Global Sustainability Tourism Council (GSTC) Destination Criteria (which was identified as one of the Strategic Directions) and were intended to be accounted for annually as part of the reporting process with GSTC.

A *Technical Appendix* underpinned the VES2035, outlining robust statistical analysis and insights and a report of consultation and engagement which underpinned the Strategy.

Progress of the Actions within the Strategy was documented post-pandemic in October 2021, which outlined actions that have been achieved, those in progress, and those that require continued focus.

Measuring the overall progress of the Key Performance Indicators of the Strategy has been a challenge for Plan stakeholders. Therefore a set of transparent KPIs that are easy to measure and provide dynamic insights (where possible) needs to be developed to measure the Plan moving forward.

VES2035 SNAPSHOT

VISION Phillip Island is recognised nationally and globally as a world-leading sustainable tourism destination, where tourism is embraced by the community.

Objectives

Community

- Create fulfilling, full-time and flexible employment for locals
- Support events that boost community pride and shift visitation to off-peak times
- Build community infrastructure that improves quality of life (trails, beach infrastructure)

Environment

- Restore coastal and inland vegetation corridors in partnership with land owners, land managers and land care groups
- Increase the Island coverage of native vegetation from 7% to 30% by 2035
- Most businesses have a recognised commitment to the environment by 2035

Economy

- Increase Phillip Island's overall average length of stay by 0.5 day
- Increase spend per visitor from $157 to above the Regional Victorian average ($184.90)
- Lift brand awareness from 6.1% to 8%

Strategic Directions

1. **Be established as a highly desirable destination,** attracting visitors that are willing to spend more per day on high-quality accommodation and quality experiences and encourage repeat visitation.
2. **Generate year-round visitation** including mid-week visitation, from a range of both domestic and international markets.
3. **Build connectivity** between accommodation and attractions so visitors can leave their car parked and enjoy the region on foot or on bicycle (or even Segway).
4. **Manage growth** of day visitors and low-value experiences to ensure sustainable long-term growth.
5. **Be recognised globally for our efforts in conservation and sustainable tourism** through improvement in the quality of the landscape, ecosystems and quality of life measured through benchmarking to the Global Sustainable Tourism Council (GSTC) Destination Criteria.

Enablers for Success

Clear vision, leadership, cohesion and communication
A tourism-oriented planning framework
Identification of priorities and focussed investment in those areas
Design guidelines to balance infrastructure with destination appeal
Advocacy of the region as being 'investment ready'
Support for entrepreneurs and investors
Diversity of products to reduce risk

Guiding Principles

- Not only preserve but enhance Phillip Island and San Remo's natural environment through sustainable development and management practices.
- Seek to enhance the lifestyle of the local community of Phillip Island and San Remo through creating certainty of employment, supporting community facilities, enhancing conservation, and supporting local events.
- Foster continued job creation and workforce retention through an increased demand for skilled, quality people.
- Improve the economic value of the region by focusing investment and marketing activity on extending visitor length of stay – shifting day trips to overnight visits.
- Focus on helping to diversify the region's market mix to promote year-round visitation opportunities, alleviate off-peak visitation troughs and promote dispersal.

Reviewing & Updating the VES2035

In early 2023, upon the launch of the new Experience Victoria 2033 Strategy, and the roll out of the recommendations of the Regional Tourism Review undertaken in 2019, it was determined by Victorian State Government that all Destination Management Plans require realignment to enable a cohesive and consistent approach to destination management across the state.

As we continue to operate in uncertain times, alignment of priorities, expectations and efficient use of resources is critical to building a sustainable destination for the future.

For Phillip Island and San Remo, this includes a thorough review of the current VES2035.

The review will leverage the comprehensive work undertaken in 2016 but will reflect the complex environment in which we now operate, and uncover ways to align all efforts across the region, connect the dots and refocus and re-set priorities for the forthcoming years ahead.

This snapshot has been developed after extensive, and considered engagement with community and destination stakeholders.

This engagement process included a comprehensive review of over 70+ strategies and plans including the current VES2035 and technical appendices, along with:

- 27 in-depth interviews with industry and community stakeholders,
- 7 community workshops held with 60+ attendees;
- 281 respondents to a visioning survey

(See Acknowledgements on Page 47 for further detail)

The intention of this snapshot is to draw a line in the sand; to report on what has been achieved, what has been changed and what is new, and where the opportunities are, from everyone's perspective.

Community and stakeholder feedback sought throughout the key milestones of this project will ensure the integrity of the review, and will result in a set of aspirational opportunities for tourism which will be underpinned by a united and cohesive vision.

VES2035 REVIEW & UPDATE - PROJECT MILESTONES

JUNE

Research & Discovery (complete)

Review of all relevant national, state and regional plans, strategies and forecasts.
Review of 70+ regional strategies and plans across various industries.

JULY

Community & Stakeholder Engagement (complete)

7 Community Workshops (60+ community members)

Vision Survey completed by 281 stakeholders

27 Individual In-depth Interviews

AUGUST

VES2035 Situation Analysis Snapshot Paper (This Document)

Analysis of all listening, and development of succinct situation snapshot for the region.

AUGUST & SEPTEMBER

Community & Stakeholder Consultation - VES3025 Situation Analysis Snapshot

Snapshot is open for consultation via email until 8th September 2023.

4 x Workshops in Region late August

SEPTEMBER

Draft DMP Development

Analysing opportunities uncovered and determining the path forward, including measurement strategy.

Further meetings + Interviews with key stakeholders

EARLY OCTOBER

Draft DMP out for Consultation

Draft DMP out for consultation with community and stakeholders via survey and online workshop.

LATE OCTOBER

Finalise DMP

Analyse feedback from Draft DMP and finalise for endorsement with key stakeholders.

FROM NOVEMBER

DMP Launch & Activation

Workshops across Phillip Island and San Remo for Community, Industry and Government.

Setting the Scene

Global Tourism State of Play

Never has there been a more complex time for destination stewards.

The tourism landscape is constantly evolving, and staying abreast of global movements and megatrends, and what they mean when it comes to building sustainable destination futures is a challenge all destination custodians are facing today.

Understanding Tourism as a Living System

Enabling destinations to thrive as places for living and visiting comes down to understanding the systems that destinations are built upon.

Understanding Tourism as a standalone sector lacks an appreciation of all of the intricacies and interconnectedness of people, cultures and environments that form a destination.

Tourism is a living network of interconnected intelligence, priorities and aspirations from all custodians of place. To survive, the network is continually listening, sharing, responding, dying and regrowing, with the challenge of maintaining a balance of strength and fragility.

The global pandemic demonstrated the fragility of the network, with long-term issues still challenging the pursuit of equilibrium for destinations.

Disruption is the New Normal

Never has there been a more complex time for custodians of tourism destinations.

Globally, the threat of recession is still very real for many countries, and indeed, some already are experiencing this - including New Zealand, one of Australia's key source markets. The Victorian Government's recent cancellation of the 2026 Commonwealth Games is an example of the tight fiscal environment and shifting priorities, impacting local Victorian communities.

Social and political instability at a global level, has a ripple effect locally, which impacts all industries and all sectors in evolving ways.

Looking backwards will not provide the answers for the future. Working in real time, with dynamic insights is the only way to make decisions.

Success in growing sustainable destinations, therefore, relies on the ability to listen and respond to challenges with agility and seize opportunities quickly and efficiently.

Digital Acceleration & Innovation

The infusion of digital acceleration and AI into the tourism industry has revolutionised the way people travel and how custodians care for destinations. Technologies offer remarkable opportunities for both supply and demand side and also unlocks data-driven insights that enable dynamic decision-making.

Destinations will be equally supported and challenged by new technologies over time, and success will be achieved through constantly exploring new ways of working to optimise the visitor experience.

Redefining Tourism Success

Given the impact of visitors reverberates throughout the destination, each part of the destination must see and feel a positive impact for overall success to be achieved.

Volume and yield tell a short story of the success of destination management, and given that visitor experiences trade on finite environmental and human resources, it is essential that custodians of place work together in this complex environment to benefit all connected systems.

Climate Change & Tourism

Tourism is both a high carbon-emitting sector and also extremely vulnerable to climate change impacts.

The warming of the planet through the increase in global greenhouse gases is increasingly impacting precious ecosystems that are often the key motivator for travel to destinations.

Extreme weather events are increasingly interrupting the capacity for local businesses to operate, including insurance market failures, and having lasting impacts on local livelihood and the environment which is used to support the visitor economy.

Destinations and businesses are increasingly responding to these challenges by reflecting on their footprint and resilience and looking for ways to integrate and enable sustainable activations that lessen their direct impact, and those of their visitors, and to also prepare for impact too.

Values are Driving Choice

The lockdown events throughout the pandemic created a seismic shift in people's connection to self, others, and the environment. It catalysed a growing demand for transparency, diversity and equality across all facets of society, community and business.

As a result, decision-makers across the board are increasingly determining how to transition to a values-driven model.

As we emerge from one of the most complex eras of our time, the value and privilege of travel have never felt greater, and this shift is having a dramatic impact on the way people understand and seek travel experiences.

Demand is growing for experiences that support people to live their values, therefore a values aligned approach to delivering meaningful visitor experiences will be essential to build a sustainable destination.

> Sustainability is front and centre of the global psyche, shaping demand for low-carbon-footprint travel options and experiences that touch the earth and its communities lightly, leaving places and people better off than when they arrived. It's no longer just about preserving the Earth's precious resources; it is increasingly about regenerating what is lost and deeply honouring what is left.
>
> **FUTURE OF GLOBAL TOURISM DEMAND, TOURISM AUSTRALIA, 2022**

Strategic Context

The Visitor Economy remains a significant driver of growth, prosperity and wellbeing for Australia.

Visitor expenditure across Australia is expected to recover quickly from the pandemic, bushfires and floods, growing from $166 billion to $230 billion between 2024 and 2030.

Victorian Visitor Economy

Following several difficult years of crisis and natural disasters, the State is determined to lean into its long-standing reputation as a world-class tourism destination to thrive post-COVID.

Guiding the Victorian Government's commitment to tourism is *Experience Victoria 2033*, which outlines a holistic approach to growing a sustainable tourism sector - focussing on five product priorities including Wellness, Arts & Culture, First Peoples, Food and Drink and Nature to drive, enable and guide investment.

In parallel to the development of the whole of Government strategy, Victoria's regional visitor economies are currently embedding a new governance framework for Regional Tourism which is determined to better respond to challenges facing industry, capture emerging opportunities, and meet the needs of visitors, local communities and businesses and continue to grow Victorian Region's share of visitation and yield.

Current State

The State is reportedly on track to achieving its ambitious visitor expenditure goal of $58.0 billion by 2033, marking a buoyant $35.0 billion to March 2023, which is an increase of 113% YoY.

From a visitor perspective, the State has rebounded strongly from the pandemic, particularly from June 2022, which is driven mostly by growth in domestic intrastate overnight visits and yield metrics.

Overnight spend, visitors and nights in regional Victoria have all fully recovered and are back above pre-pandemic levels for both interstate and intrastate markets, reflecting the strong pace of its recovery and performance.

From an inbound perspective, there were 132,140 short-term international visitor arrivals to Victoria in the month of June 2023, which represents 77% of pre-pandemic numbers, behind the level of recovery for Australia generally (at 82% of pre-COVID arrivals). In terms of international student arrivals, the State has strongly recovered surpassing pre-pandemic levels by 108%.

Visitation Forecast Data

To the end of June 2023, Roy Morgan canvassed views of nearly 15 million Australians aged 14(+), with over two-thirds indicating their desire to spend at least one night on a domestic holiday in the next two years.

Within that, just shy of 3 million respondents noted their preference to visit Melbourne, which is an enormous lift from 800,000 just two years ago at the height of the global pandemic. Over 2.4 million of those mentioning a desire for an overnight trip to Melbourne are from interstate – a higher number than was achieved by any other state in the study.

Whilst travel forecasts exist through Tourism Research Australia for all states and territories, which notes that Victoria will not recover to pre-pandemic levels for overnight visitation until 2024, the current state of visitation is incompatible with that of this report.

Therefore it's incredibly difficult to record the future potential citing this discrepancy, and the very volatile nature of the system in which tourism operates.

REFERENCES
THRIVE 2030: The Re-Imagined Visitor Economy, Austrade, 2022
Business Victoria's Victoria's Tourism, Events and Visitor Economy research overview
Victoria's Tourism Performance, Year End March 2023
International Data supplied by TEVER on 18 August 2023, via eDM (quoting Australian Bureau of Statistics data as at 17/8/23)
Roy Morgan Research > https://www.roymorgan.com/findings/9313-australian-holiday-destinations-june-2023
Tourism Research Australia's Tourism Forecasts for Australia 2022-2027

Phillip Island & San Remo

Tourism has played a significant role in shaping the destination's DNA and supporting the economic profile of the region for over a century.

The VES2035 outlined nine Sustainable and Regenerative Objectives across *Community*, *Environment* and *Economy*. Whilst there has not been any formal review of the KPIs in terms of achieving the targets, below is a snapshot of the progress made toward the desired outcomes.

Economy

In 2021/2022, the region remains the most tourism-dependent across regional Victoria, accounting for $388m (26.8%) of Gross Regional Product, $340m (25.3%) of Gross Value Added and 5,400 (39.3%) of Filled Jobs in the region.

The next most tourism-dependent region in the state is *Victoria's High Country* where tourism accounts for 13.9% of Gross Regional Product and 22.7% of Filled Jobs, indicating just how important tourism is to Phillip Island and San Remo with respect to other destinations in Victoria.

Recent preliminary data indicates positive economic growth in tourism consumption since 2021/22, however, the industry shares sentiment of more tempered growth for the majority 2023.

As of June 2022, the region's traditional sector was made up of 608 businesses, with one-third being micro businesses. (22.1% increase from 2019, and 11.2% increase from 2021).

Whilst the population of Phillip Island has grown over 32% in the period 2016-2021, the growth in private dwellings has only grown 12% in this time period. This is good news, as the VES2035 predicted a stronger correlation between population growth and dwellings, presenting less of a challenge than forecast.

Visitor Profile

The region's strong recovery has been headlined by growth in domestic overnight stays, which is up 20% since 2019 (now account for 50% of total visitation). This growth has contributed to nearly double the yield to that of pre-pandemic levels (growing by 99%). This is an excellent outcome, given one of the key objectives within the VES2035 was to grow overnight stays.

Further to this, domestic day trips (approximately 50% of total visitors) are down 4% on pre-pandemic levels, but yield from this market is up 40%, and grew YoY from 2022/2023 by 49%. Low yielding day trip market was also a major challenge identified in the VES2035, therefore, this is another positive result for the region.

Whilst day trip visitors are yielding more than pre-pandemic (at $135 per visitor), domestic overnight visitors remain the highest-yielding market with the average spend per visitor at $583.

Post-COVID, the average spend per visitor ($193) is just shy of the VES2035 target of $195.

In 2019, the region hosted an average of 67,000 international overnight visitors contributing approximately $27m in expenditure (equating to $402 per visitor, staying 3.43 nights).

Further to this, PINP reported the sale of 265,096 international visitor tickets during 2022/2023, and arranged over 50,000 night stays with Tour Operators.

Tourism GRP, GVA and Jobs data from 'Economic Dashboard - Phillip Island 2021/22, report
Tourism Businesses data from 'Tourism Businesses in Victoria as at June 2022, March 2023' Report
Population and Dwelling Data, Census (accessed August 2023)
Visitor yield and profile data from 'Victorian Tourism Statistics YE March 2023' data supplied by the Tourism and Events Research Unit, DJSIR, June 2023.
Visitor Purpose for Travel data has been extracted from the most recent Tourism Research Australia Phillip Island Profile (2018/2019)

Whilst international visitation is still down 68% on pre-pandemic levels for all Victorian regions (borders reopened in February 2022) the region is reportedly receiving visitors from India, Malaysia, Singapore and the USA.

Pre-COVID, visitors were travelling to the region predominantly for holiday purposes (69%), along with visiting friends and relatives (22%).

For the State, holiday travel has led the recovery of domestic travel with overnight spend (+69%), visitors (+12%), and nights (+19%) in this purpose category all above the pre-pandemic performance in the year ending March 2023.

Domestic overnight spend in the visiting friends and relatives (VFR) segment has also fully recovered above the pre-pandemic level (+35%), as well as the business purpose category (+9%). However, overnight visitors from both of these segments are yet to fully recover with VFR just below the pre-pandemic result (–5%) and business still well below (-20%).

Community & Environment

Whilst there is no centralised, dynamic data source that speaks to the achievement of the community and environmental objectives in the VES2035, the region is currently buoyant with tourism projects that seek to drive positive impact for the community and environment (outlined in this document). Each contain objectives and measurement outcomes that support a net positive benefit from tourism for the environment and community.

TECHNICAL NOTE

A great deal of analysis was undertaken in the Technical Appendix to arrive at the KPIs, the data extrapolated was exclusively for Phillip Island, and not that of the whole region, which is challenging to measure now and in the future, given all data and insights available from the Tourism and Events Research Unit (in the Victorian State Government Department of Jobs, Skills, Industry and Regions) accounts for the whole BSCS region.

That being said, the tourism ecosystem has endured such change since the VES2035 was endorsed, that any baselines and forecasts determined pre-COVID are relatively unreliable, and as such, it would be challenging to draw any reasonable conclusions about the progress of any KPIs determined in 2016.

DESTINATION PERFORMANCE SNAPSHOT

VISITORS

DOMESTIC OVERNIGHT

As at March 2023

682m Expenditure
(+99% from 2019)

1,169,000 visitors
(+20% from 2019)

INTERNATIONAL

Still recovering
Whole of state still 68% down on pre-pandemic numbers.

DOMESTIC DAY TRIPS

As at March 2023

157m Expenditure
(+40% from 2019)

1,160,000 visitors
(-4% from 2019)

COMMUNITY & ENVIRONMENT

Many projects across the region already seek to drive a positive impact for the community and environment (outlined throughout this document).

Each project contains objectives and measurement outcomes that support a net positive benefit from tourism for the environment and community.

ECONOMY

GROSS REGIONAL PRODUCT

$388m
(26.8% total Regional GRP)
(-24.2% from 2019)

BUSINESSES

608 Tourism Businesses
1/3 micro-businesses
(+21.9% since 2019)

JOBS

5,400 Filled Jobs
(39.3% direct and indirect jobs)
(-15.5% from 2019)

Destination Strengths

Phillip Island and San Remo communities are passionate about their special place. Five major destination competitive strengths have been identified by the community, leaders, industry and stakeholders.

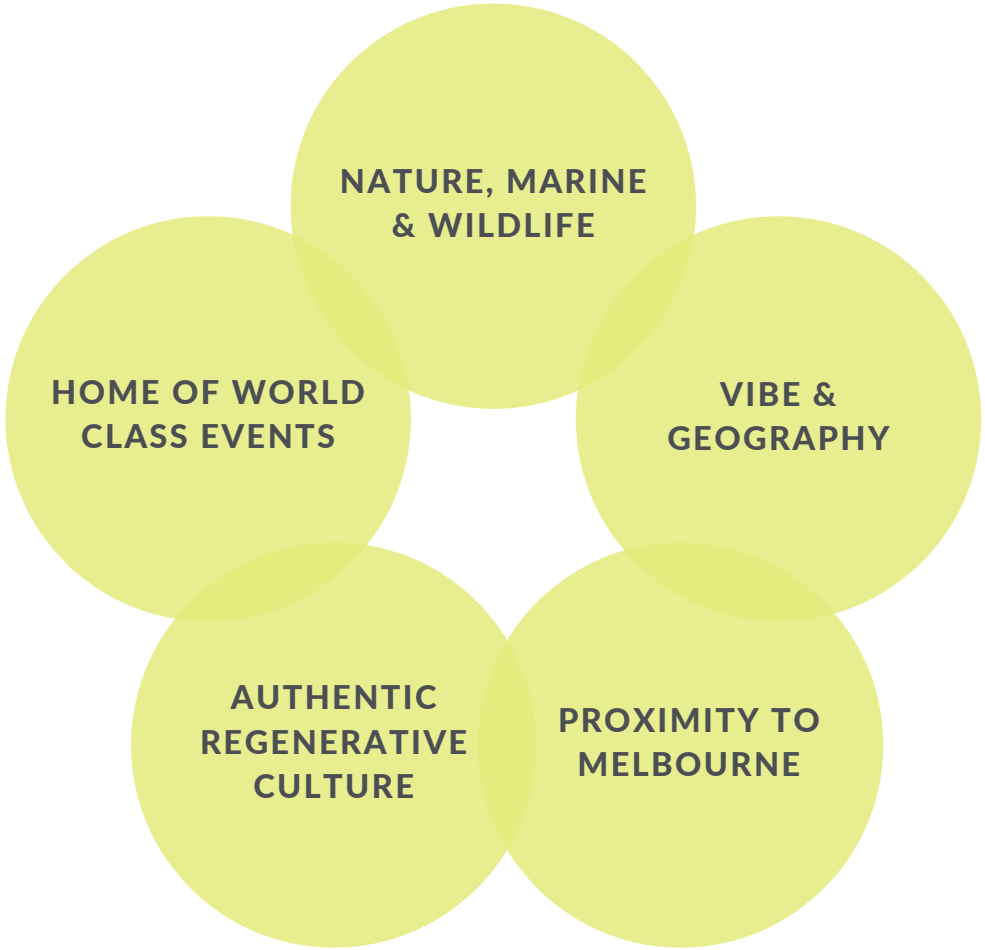
Nature, Marine & Wildlife
An abundance of wildlife across land, sea and air, the Iconic Penguin Parade, aquatic experiences and aquaculture industries, rugged coastlines, stunning landscapes and pristine beaches are what make this place special.

Authentic Regenerative Culture
The community have been committed to the conservation of the environment and the species that call it home for decades which underpins the focus on regenerative tourism today.

Vibe & geography
A slower pace of life, relaxed vibe, surfing lifestyle and history, fresh air and compact geographic area are cherished by locals and highly appealing to visitors.

Proximity to Melbourne
The close proximity of the destination to Melbourne makes it an easy commute for metropolitan, interstate and international travellers.

Home to World-Class Events
The Australian MotoGP and Superbike World Championships have attracted tens of thousands of visitors each year for many decades. A world-class race track and associated permanent spectator infrastructure ensure the delivery of motorsport events to a global standard. Across the wider destination, a robust calendar of events attracts other visitors at different times of the year.



A United Vision

"In the future, I'd like Phillip Island and San Remo to be an environmental eco-destination which can educate and inform visitors of their natural world."

- COMMUNITY MEMBER, COMMUNITY SURVEY JUNE 2023

Determining a United Vision

A united vision will underpin the updated Destination Management Plan.

With five strong and valid vision statements already in existence, the opportunity will be to create a succinct vision that speaks to the priorities of all stakeholders within the region.

Current VES2035 Vision

Consultation with community in 2016 determined the following vision for Tourism as outlined in the VES2035:

Phillip Island is recognised nationally and globally as a world-leading sustainable tourism destination, where tourism is embraced by the community

Bass Coast Community Vision 2041

The Bass Coast Community Vision 2041 was developed by the community to articulate long-term aspirations for the future of the Shire.

From its flowing hills to its wild unspoiled coastlines, the Bass Coast is a source of celebration for all who live in and visit the region.

Our townships are vibrant, rich with culture and full of life, each with its own distinct character. Drawing on our creativity, innovation and resilience we've created a thriving and diverse economy that supports sustainable agriculture and industry.

We live proudly on Bunurong Country, and build on learnings from our First Peoples and their knowledge. We coexist in harmony with our environment, and are prepared for future challenges and changes.

We are the people of the Bass Coast. Experience our cultures and history, and contribute to our story.

Phillip Island Nature Parks

Phillip Island Nature Parks (PINP) is a unique conservation organisation that operates complementary ecotourism experiences on Phillip Island. Given they are a major touchpoint for visitors to Phillip Island and San Remo, it's important to consider their vision in the work they do.

A place where conservation and ecotourism excellence inspire people to actively protect the environment.

Experience Victoria 2033

The Victorian Government has recently released a whole of state tourism vision within the new Experience Victoria 2033 Strategy.

We will work together to make Victoria a leader in the delivery of exceptional, diverse, and connected experiences for visitors.

We will invest in bold, innovative, and inspiring tourism products and experiences that attract more visitors to come to Victoria, stay longer, and spend more.

We will ensure Victoria maximises the social and economic benefits of domestic and international tourism.

We will – by creating a strong, resilient visitor economy – build a prosperous, sustainable future for Victoria.

Bass Coast Distinctive Area Landscape - Draft Bass Coast Statement of Planning Policy

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The Victorian Government has legislated to protect and enhance Victoria's distinctive areas and landscapes, including the Bass Coast. This 50-year vision identifies the values, priorities and preferences of the community in relation to the distinctive attributes of the Bass Coast, including preferences for future land use, protection and development.

By 2070, the vision for the Bass Coast declared the area is that the Bunurong people (represented by the Bunurong Land Council Aboriginal Corporation), governments, public land managers, businesses, residents and visitors work together to ensure the declared area's distinctive attributes — the things people love about the area and value it for — are protected and enhanced for current and future generations.

Strategic Themes

8 Strategic Themes

After conducting extensive stakeholder engagement, and desktop analysis including a comprehensive review of the Visitor Economy Strategy 2035, Eight Strategic Themes have emerged as consistent issues to consider.

Each theme is explored in context with a series of considerations which have been derived through listening and desktop analysis. These considerations will form the basis of the opportunities in the Destination Management Plan.

THEME ONE

Preserving, Caring For & Regenerating Our Special Place

The community of Phillip Island and San Remo share a special connection with nature and have a strong emphasis on preserving natural assets for future generations.

The privilege of caring for the land coupled with a strong sense of responsibility to maintain the destination's unique beauty is a high priority for all stakeholders.

There are major concerns about the impacts of urbanisation and population growth on coastal and natural landscapes, wildlife and waterways which threatens environmental conservation efforts and the visitor promise.

Balanced growth was a consistent message from across all resident demographics - those working within and outside of tourism, long-term and new residents, and long-term repeat visitors.

Theme in Context

Urbanisation & Population Growth

- Phillip Island is on the doorstep of Australia's largest and fastest-growing city.
- The region is seeing strong population growth and new housing developments.
- There is pressure for residential and tourism development to stretch into rural landscapes.
- There is concern regarding in-fill developments, the impact of infrastructure on natural landscapes, and the growth of high rise as town boundaries are locked down.

Long-Term Environmental Care

- Many custodians have a long-term history and future focus on caring for wildlife and natural places; including BCSC, PINP, Parks Victoria, Community Groups (eg Phillip Island and Bass Coast Land Care), Traditional Owners, Residents (Town and Rural), Farmers and tourism operators.

Industry Actions

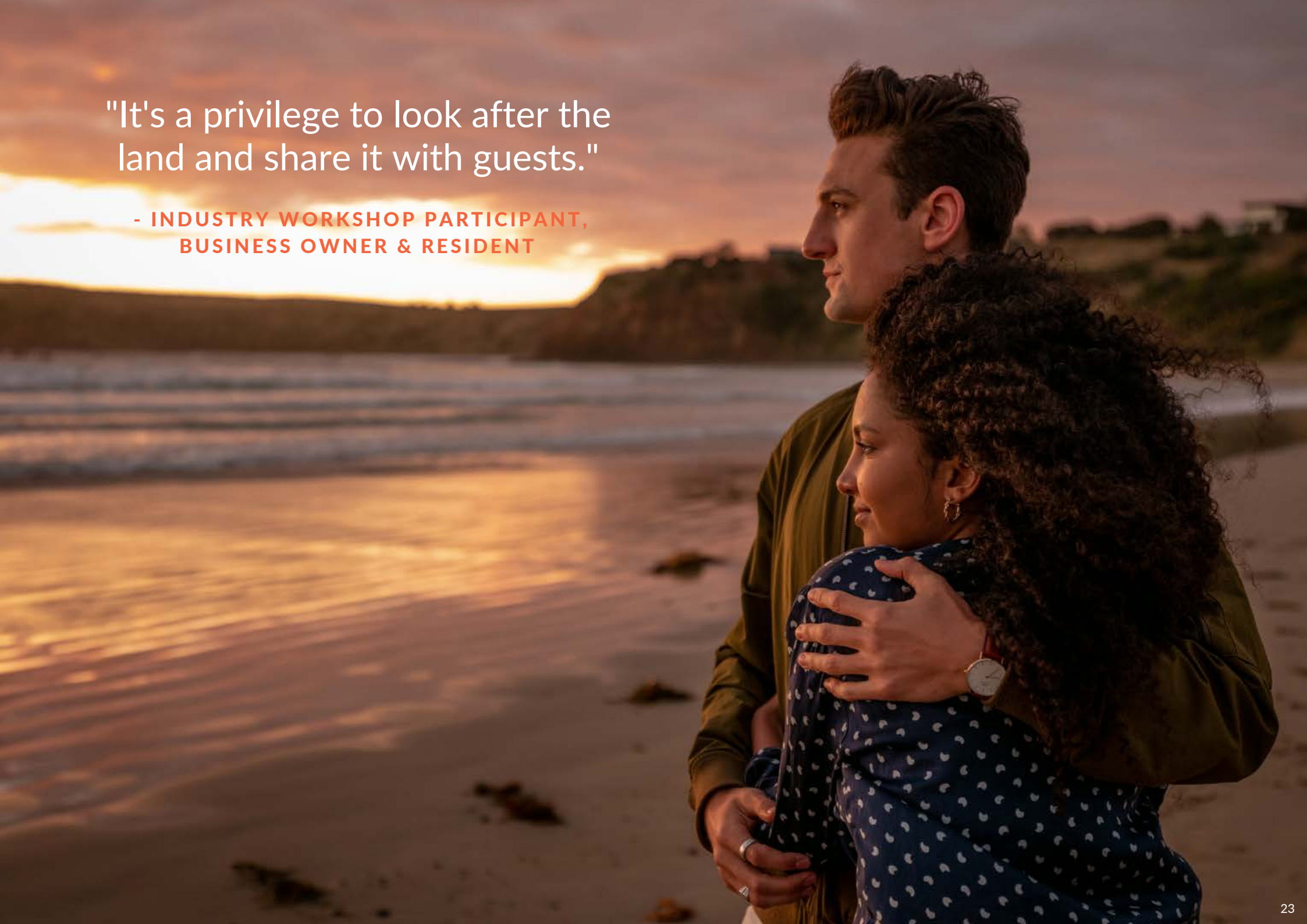
- Demand for sustainable experiences is growing globally, yet there are limited ways for visitors to give back when travelling to the destination.
- There is a relatively limited 'regenerative tourism' mindset within the tourism industry.
- New projects by DPI include: building regenerative tourism understanding, positive impact experiences and conservation group and tourism partnerships.

Sustainable Destination Accreditation

- EcoTourism Australia's *Eco Destination Accreditation* is currently being pursued by BCSC which has been deemed more relevant for the region than *Global Sustainable Tourism Council Certification*.

Considerations

1. **Unite stakeholders around a shared Vision,** and identify specific 'caring for place' goals.
2. **Advocate for the development of Positive Impact / Carbon Positive Tourism** experiences, accommodation, transport and business events.
3. **Embed a Regenerative Mindset -** Across the whole region (including people who live, work, visit or invest in the region).
4. **Consider Wildlife as Equal Stakeholders** and include them in decision-making.
5. **Activate 'Giving Back' Opportunities -** All visitors have opportunities to give back to the community and environment.
6. **Consider an Island Promise –** Visitors understand community values and expected behaviours before and whilst visiting the destination, including in a format for culturally diverse visitors.
7. **Consider a Visitor Contribution Fund -** To re-invest back into local conservation projects.
8. **Educate Community & Industry about Sustainability Stories -** Stories about what's already happening / new across the region.
9. **Eco-Certified Destination Accreditation** for the Bass Coast Shire Council.
10. Advocate for all tourism operators to undertake the most aligned and relevant **sustainability accreditation for their businesses**.



"It's a privilege to look after the land and share it with guests."

- INDUSTRY WORKSHOP PARTICIPANT, BUSINESS OWNER & RESIDENT

THEME TWO

Uniting Stakeholders & Creating an Accountability Framework for Action

A balanced, progressive, and synergistic view from all stakeholders is essential to enable a positive future for tourism in the region.

The significant number of actions contained within the VES2035, limited community and visitor sentiment data, and the change in Strategy custodianship have impacted the momentum and delivery of key priority projects.

Further, the shift to Visitor Economy Partnerships, the complication of varying governing frameworks, and lack of resources to oversee and steward the strategy are all important challenges that need to be addressed in order to set the region up for success.

Theme in Context

VES2035

- Recommends over 60 actions across 10 major game-changer projects. Further to this, there are an additional 110 actions in Technical Appendix.
- A shift in focus affected strategy implementation in the last couple of years.

Sustainable Tourism Accord & Reference Group

- A *Sustainable Tourism Accord* was adopted in 2016 by the BCSC, PINP and DPI. It's principles remain relevant and purposeful
- A *Community Tourism Reference Group* was formed in 2017 to help implement the VES2035, but has struggled to keep momentum or articulate its role in recent years.

Destination Governance

- In 2023/24 Regional Tourism Boards will transition to Visitor Economy Partnerships (VEPs), which will be recognised as peak official voices for the visitor economy in their region.
- The region will actively participate in the transition process to advocate for a model that prioritises Phillip Island and San Remo themes identified in the Destination Management Plan.

Measuring Success

- Whilst many projects are completed or in progress from the VES 2035 it has been a challenge for stakeholders to report on the original VES 2035 key performance indicators.
- DPI facilitates an industry barometer.
- BCSC conducts an annual community sentiment survey, however, this does not include visitor economy sentiment.

Collaboration

- BCSC use *Engage Bass Coast* as the primary mechanism to inform the community and undertake stakeholder engagement.
- DPI distributes regular industry news and has a strong Facebook following. Both have a good readership and could be leveraged to communicate strategy outcomes.
- All stakeholders maintain independent Risk and Crisis response plans.

Considerations

1. **Adopt a Stewardship Mindset** across the whole destination, whereby the implementation of projects within the plan are the responsibility of all stakeholders.
2. **Co-create an Accountability Framework and Communications Plan** for the updated DMP endorsed by all stakeholders.
3. **Community Engagement Plan -** opportunity for ongoing engagement around visitor economy and maintaining social license with community.
4. **Prioritise region-wide partnerships** with aligned organisations and their strategic plans. Involve them in the creation of the Accountability Framework in anticipation of the VEP transition in 2024.
5. **Set transparent KPIs that are easy to measure** and provide dynamic insights (where possible).
6. **Report project implementation status regularly** to community, industry and stakeholders.
7. **Ensure risk management frameworks and crisis response is collaborative and consistent** to enable coordinated approach to future crises.

THEME THREE

Understanding Place DNA & Communicating Our Unique Story

The destination's conservation story is incredible and has the potential to capture the interest of values-aligned visitors, tourism operators and investors, and inspire other destinations at a time of global uncertainty and change.

There is a perception from industry that the current destination brand and positioning is not brave or bold enough.

Furthermore, the destination's conservation, regeneration, climate activism and First Nation People's stories are not well understood by local residents (who are important word-of-mouth advocates), or communicated to visitors in a compelling way.

Theme in Context

Destination Brand & Marketing

- DPI are the custodians of the destination brand.
- DPI are responsible for driving demand from high-value visitors through storytelling and campaign activations across a regional website, social media platforms and consumer e-newsletter as well as earned and paid media. They maintain an international trade program, media partnerships, and domestic consumer direct campaigns. They also create an annual Official Visitor Guide. Tactical results on key marketing KPI's have been positive.
- Visit Victoria markets the destination domestically and internationally with the sub-regional state positioning 'Victoria's Island Sanctuary'.
- It will be very important to maintain visitor-focused brand and storytelling as part of the VEP transition in 2024.

Storytelling

- BCSC are important storytellers for visitors to the destination, with visitor touchpoints including the Phillip Island Visitor Information Centre, events, visitor collateral, and interpretive signage.
- Tourism operators are also key storytellers of place.
- *My Phillip Island Tourism Ambassador Program* educates and shares a consistent and scaled story of the destination with local businesses, schools and volunteers, and has been well engaged, but has great potential to support positive community and visitor behaviours.

Community Storytelling

- Community have an important role to play in sharing the destination story with visitors through word of mouth.
- Local community communications aren't part of DPI's remit, except in times of crisis (such as through the COVID19 pandemic) which was positively received by the community.
- BCSC are the custodian of community communication and engagement. *Bass Coast Engage* is the portal for communicating with residents, if they are proactive and know where/what to search and find information.
- There is a negative bias toward Tourism via local media.
- Current residents and long-term holiday visitors to the region have a wealth of engaging stories and anecdotes over the decades and are a great resource for future authentic, place-based storytelling.

Our Good News Stories

Regenerative stories the community are proud of:

- Penguin regeneration 40+ years in the making. Summerland buyback, penguin population rebounded, now more penguins than residents.
- Short-tail Shearwater migration. 'Lights off for take-off' campaign.
- Cape Barren Geese, rebounded population
- Eastern Barred Bandicoot, saving from extinction
- Eradication of foxes on Phillip Island
- Whale migration across winter, rebounding numbers
- Phillip Island Nature Parks; conservation, education and research programs, indigenous rangers support.
- Totally Renewable Phillip Island and electrifying Phillip Island
- Regen Alliance goals (eg plastic-free PI by 2030)
- Blue carbon farming in Western Port Biosphere
- Green carbon farming, such as Bimbadeen, a carbon-neutral farm on Phillip Island
- Western Port Biosphere RAMSAR - a wetland of international significance
- Waste – Bass Coast Shire Council has the highest waste diversion from landfill in Victoria
- Philip Island Community and Learning Centre (PICAL) - work and actions in community and environment, biodigester, whole island circulatory, composting, social impact work.
- Phillip Island and Bass Coast Land Care - regeneration and collaborative projects across the region
- Dogs off beaches, and Phillip Island’s off-leash area, to protect native animals
- Phillip Island Conservation Society - 55 years of advocacy and care, with many wins
- Rhyll Inlet, saved from being turned into a marina over 40 years ago.
- First People's very rich, spiritual stories of place
- Totally renewable Phillip Island. Story of the battery. 50% solar on the roof, feeding into the battery (if done tomorrow, the Island would be energy positive).
- Cowes Cultural Centre sustainable build story - Passivhaus Standards
- Biodiversity Biolinks Program and land buy back programs

First Peoples

- There was a strong sentiment from industry and community First Nations as a key pillar of the destination story, which is currently not told widely or clearly. There is concern about how they share this story respectfully and in the right way.
- First Nations storytelling has to come from a place of cultural approval, which takes longer-term relationship building. Currently, dual naming, signage, and interpretation are limited
- BCSC, DPI, PINP and other organisations in the region are building relationships with the Traditional Owners and First Nations Leaders to share stories through experiences, projects, events and Reconciliation Action Plans.
- The Victorian State Government's First Peoples Tourism Strategy and First Peoples Industry Organisation are soon to roll out, and alignment by this DMP is essential

Traditional Owners

- Bunurong Land Council Aboriginal Corporation are the Traditional Owner organisation that represents the Bunurong people of the South-Eastern Kulin Nation.
- They will be engaged in the next stage of this project, to hear and confirm their vision and aspiration for the destination.

Considerations

1. **Activate bold and brave storytelling,** focused on the motivations and needs of the destination's values-aligned visitors, across all visitor touch points, of which the industry and Visit Victoria also align to.
2. **Amplify the Conservation stories of place,** tapping into communities' many wonderful anecdotes and stories.
3. **Amplify the community and industry's transition to carbon-positive futures** to tell the sustainability story.
4. **Create the story of Millowl** with Traditional Owners.
5. **Showcase how a community can work together** to solve the many global challenges around climate change and biodiversity loss.
6. **Activate unified and consistent storytelling across all key visitor touch points -** destination marketing, visitor servicing, industry and community.
7. **Continue activation of My Phillip Island Ambassadors Training Program** to drive more storytelling across community visitor touchpoints.
8. **Partner and collaborate with organisations working in First Nations, Conservation and Regeneration** spaces to further develop collective knowledge and stories that underpin the destination's DNA.
9. **Partnerships and collaboration** with surrounding Regions, Visit Victoria, Tourism Australia and Peak local and industry organisations, to ensure their storytelling of the destination is aligned to the Place DNA.

THEME FOUR

Enhancing the Visitor Experience

Renowned for its pristine beaches, enriching landscapes, abundant wildlife encounters, and nostalgic summer getaways, Phillip Island and San Remo have created lasting memories for a diverse mix of visitors for over a century.

A key goal has been to convert day trippers into longer stays and attract high-value domestic and international markets through new and enhanced visitor infrastructure projects.

Existing challenges the destination faces, such as managing the excess supply of short-stay accommodation, limited quality hotels, dated visitor infrastructure, growing the quality of events and reviewing the mix of retail, hospitality and visitor attractions must be addressed to meet current visitor expectations and attract new markets.

Visitor experiences also need to align with the destination's vision which can be achieved through industry capability building mentoring programs.

Theme in Context

Development & Planning Policy

- The *Unlocking Rural Tourism Strategy* was developed to identify and reduce roadblocks to establishing new rural tourism developments in the BCSC area.
- There have been some challenges activating projects within the framework.
- Bass Coast was declared a Distinctive Area Landscape in 2019 and will see settlement boundaries for townships. There is community concern this will see high-rise developments in the area as town boundaries are locked down.
- Ease of doing business and encouraging an incubator/ entrepreneurs ecosystem attracting new ideas and private investment to the region should be considered a high priority of the new DMP.
- Climate change is impacting planning policy, i.e. rising sea levels and the impact to develop coastal areas.

Private Investment & Entrepreneurship

- In recent years there have been a number of private enterprise, visitor-focused business initiatives launched in the region.
- The enthusiasm, collaboration and fresh ideas of the private sector will be paramount to the destination's success in delivering on the visitor promise.

Capability Building

- BCSC and DPI undertake a series of development programs each year to strengthen industry capacity.
- Bass Coast Business Awards and Victorian Tourism Awards celebrate local business
- Whilst capacity building was not a focus of the VES2035, it is an important element in the growth and sustainability of visitor economies, and should be a priority in the updated DMP.

Considerations

1. **Advocate for private developments** that are sensitive to environmental and community values, align with the destination's experience strengths and help attract values-based travellers.
2. **Develop an incubator ecosystem** to support and encourage new ideas and private investment to the region to deliver sensitive and sustainable tourism initiatives (see consideration 9 under Theme 5).
3. **Continue to deliver a strong suite of capability-building programs** focused on values, vision, regenerative principles, and delivering exceptional experiences.
4. **Prioritise Cultural Capability Building** training to build awareness and understanding.

Experience Victoria 2033 Experience Pillars

Experience Victoria 2033 considers the following areas as the State's competitive advantages and are listed as product priority areas for regions to focus on:

- Nature
- Wellness
- First People's led experiences
- Arts and culture
- Food and Drink

Nature

- Wildlife (land, sea and air), beaches, coastal landscapes and walking trails are the hero visitor experiences of the destination.
- Much work has been done by PINP to improve the experience by reducing numbers and offering more exclusive options and choices at different price points. Completing PINP's Summerland Peninsula Masterplan is still in progress.
- The vision for Yallock Bullock Park is to create a high-profile walking trail by extending the George Bass Coastal Walk from San Remo, with a vision to be one of Victoria's iconic walking trails.
- There are limited tour operators connecting in-destination connecting nature & wildlife experiences across the destination for single day or extended stays on land and water.
- Marine tourism activation requires fit-for-purpose infrastructure to meet visitor needs (eg accessible), some of which are lacking.
- Walking and cycling trails are key ways for visitors to experience Nature in the destination.

First Peoples Led Experiences

- It is the desire of the Victorian Government, DPI and the community to support the development of First Peoples Led Experiences connecting visitors with country and culture in a meaningful and authentic way.
- The development of First Peoples led experiences must be done in conjunction with Land Council and or other First Nation's Interest groups who have cultural authority to activate experiences.
- Bunurung Land Council are interested in tourism and are currently building its capacity to pursue relevant opportunities and partnerships.

Arts and Culture

Galleries

- There is currently no regional gallery in the region. There is only one art space accessible to visitors: Art Fusion Studio and Gallery. Despite this, the region has many local artists with some local venues showcasing local works and artists in residence.

Museums

- The *National Vietnam Veterans Museum* and the Phillip Island Circuit showcase collections and are popular attractions.
- The *Antarctic Journey at the Nobbies* (PINP), Historic Walk in San Remo and Heritage Farm on Churchill Island are other historic and cultural experiences that tell valuable stories of place and culture.

Heritage & Art Trails

- Art, heritage and cultural trails are an excellent way for visitors to learn about the story of place and disperse throughout a region.

Considerations

Nature

1. **Game Changer:** Summerland Peninsula Masterplan completed.
2. **Game Changer:** Yallock Bullock Walking and Cycling Trail funding.
3. Marine Infrastructure is well planned/managed and fit for purpose (inclusive).
4. Advocate and support new or existing regenerative focused tourism operators across wildlife, coastal, aquatic, land-based tours, experiences, and hire (inc. citizen science opportunities).
5. Advocacy tracks and trails that support visitor experiences on the Island.

First Peoples Led Experiences

1. Advocate and support for development of First Peoples led experiences.
2. Look to Parks Vic, PINP and BCSC for case studies and best practice in First Nations led consultation and project initiation.

Arts and Culture:

1. Art and events activations at the Cultural Centre
2. The new National Vietnam Veterans Museum expansion.
3. Support and advocate for the enhancement, upgrade or development of values aligned historic and cultural institutions to ensure visitors are engaged in contemporary and high quality exhibitions.
4. Bass Coast Dinosaur Trail - support for values aligned visitor experience.
5. Explore and support the development of a Regional Art Gallery for visitors to connect with local artists and artisans.

Wellness

- The wellness sector has experienced considerable growth since the pandemic. Beyond traditional activities like spa, yoga, and beauty, there's now a greater focus on self-care and disconnecting from the fast pace of life.
- Physical and mental health will remain a priority and as such the wellness sector (including wellness tourism) is predicted to grow exponentially in the years to come.
- Wellness experiences are appealing to high-yield visitors, and coupled with the destination's competitive advantages of nature, wildlife and a relaxed island vibe offer a significant opportunity to nurture.
- Concept planning has been undertaken for a new Wellness Festival, for activation by destination businesses. Its commercial approach will help minimise resourcing, funding and governance challenges of other destination events.

Food & Drink

- The region is home to a number of producers many of which have visitor-facing retail and hospitality offerings, including the San Remo Fishermans Co-op (only one of three left in Vic).
- From freshly caught seafood to wineries and breweries, to farm gates, and providores, the region is gaining a reputation for high-quality food and drink experiences.
- The destination is well placed to be able to genuinely tell the story of place through its honest and approachable food (including seafood) and drink offerings.
- The majority of Food & Drink operators are SMEs and face the same challenges all small businesses face (ie staffing, increasing cost of business, permits).
- The quality, standard and opening hours of some venues require improvement.

Additional Experience Focus Areas

Accommodation

- The destination has an imbalanced accommodation offering with many short-stay holiday homes, caravan parks, motels and apartment-style hotels, lacking higher-end boutique and large-scale hotel accommodation.
- The quality of existing accommodation and variety of short-stay options are often targeted to budget travellers, which is not appealing to business or high-yield visitors.
- The VES2035 addressed this challenge by recommending a number of actions and game-changer projects; some of which are in the process of seeking approval/ construction.

Agritourism

- The term agritourism encompasses a wide variety of activities where agriculture and tourism intersect.
- The sub-sector is currently worth approximately $9.4 billion per annum.
- The region has a strong culture of farming and agriculture and has a number of well-established agritourism experiences.

Family Attractions

- The destination is a well-known and loved summer holiday destination.
- Some facilities and venues are in need of refurbishment to meet future demand.

Considerations

Wellness

1. Given the predicted growth in the wellness sector, nurture the development of new products and experiences in this area.
2. **Game Changer:** Support and advocate for the Phillip Island Hot Springs and associated experience offerings.
3. Activate the Wellness Event concept.

Food and Drink

1. Support the development and promotion of food and drink experiences that align with the destination strengths and values.
2. Further development of Tidal Seafood Festival in San Remo.

Accommodation

1. Advocate for Isle of Wight and Phillip Island Hot Spring's Accommodation.
2. Pursue investment attraction and create an enabling environment for values aligned accommodation providers to the region.
3. Advocate for and support the refurbishment of accommodation venues to meet expectations of high yield and business travellers.

Agritourism

1. Focus on further development of the agritourism sector which appeals to a values aligned high yield visitor and aligns with destination strengths.

Family Attractions

1. Undertake an experience and product audit of all attractions identifying those that could benefit from refurbishment and support them in funding applications.

Events

- The current calendar of events is solid. The quality of some events was noted as more local-focused than driving demand potential. The connectivity with the wider Island experience was also noted as a challenge of some events.
- The Australian MotoGP and World Superbike Championship are hero events that bring a global perspective and significant economic impact but also have challenges from the perspective of the community and environment.
- *TIDAL Seafood Festival*, *Island Whale Festival* and *Festival of Stories* are all activated however, scale, human resourcing and funding across all three events are a challenge.
- Local markets are popular with both visitors and the community.
- The capacity of local venues and availability of appropriate accommodation currently limits growth in the MICE sector (Meeting, Incentives, Conferencing, Events).

Public Infrastructure & Placemaking

- There is constant tension to maintain public infrastructure to an appropriate standard, particularly during peak periods and with the growth of the resident population.
- The community considers the maintenance and upgrade of public conveniences, particularly around popular coastal areas, such as car parking, toilets, playgrounds, shelters and signage to be a high priority.

Visitor Servicing

- Visitor Servicing plays an important role in helping communities realise the full potential of the visitor economy in their destinations, by helping visitors stay longer, spend more, disperse more widely, encourage respectful and responsible visitor behaviours, and help improve visitor satisfaction.
- The team plays an important outreach role in the community, such as on Cruise Ship arrival and during key events.
- The BCSC Visitor Servicing team have applied for funding for *Understanding the Cultural Landscape*, this would be a key project to support some of the First Nation's opportunities identified in the Plan.
- Visitor servicing staff and resources have an important role to support the activation of many areas of the opportunities identified in this plan, and so are key stakeholders who need to be part of the updated plan's Governance and Accountability Framework.
- Phillip Island Visitor Information Centre (PIVIC) is an important touch for visitors on arrival to the region and receives very positive visitor reviews from visitors. However, like many centres across Australia, it has seen falling numbers in recent decades as visitors find travel information at their fingertips, so a challenge will be to remain relevant to future visitors.

Considerations

Events

1. Ensure existing events are delivered to high standard.
2. Support TIDAL Seafood Festival, Island Whale Festival, Festival of Ideas and the Wellness events to become strategically focused, sustainably resourced and governed, quality events for the destination.

Public Infrastructure & Placemaking

1. **Game Changer:** Finalise and activate the game changer projects in the VES2035, including the San Remo Masterplan.
2. Maintain the standard of public amenities and infrastructure to meet the demands of visitors and community.

Visitor Servicing

1. Proactive planning to support the PIVIC to remain relevant for future visitor expectations and needs.
2. Position the PIVIC as a must do experience for visitors to the destination.
3. Governance frameworks that enables the PIVIC visitor servicing team to support both BCSC community priorities as well as updated DMP priorities areas.

"Attract investment in the right locations. Facilitate well-planned outcomes. Be bold. Be visionary. Be balanced."

- COMMUNITY MEMBER, COMMUNITY SURVEY, JULY 2023

THEME FIVE

Activating an Engaged Workforce to deliver upon the Promise

Regional communities across Australia have been faced with skills shortages for decades, an issue that has been exacerbated since the pandemic.

In partnership with the DPI created a *Visitor Economy Workforce Strategy* to address this challenge.

The problems faced by employers recruiting the right candidates, the lack of willing and available workforce to meet demand, the scarcity of affordable, short-term housing during peak season, and accessibility to and around the destination are addressed in the Strategy.

The flow on affect of the shortage of workers on the local volunteer pool, coupled with the changing expectations of visitors and new workers, employers are having to manage a once-in-a-generation workforce shift, is proving difficult and exhausting to many.

Theme in Context

Attracting & Retaining Values Aligned Staff & Volunteers

- The shortage of willing and able workers is affecting the visitor experience.
- The community's authentic commitment to conservation and regeneration needs to be leveraged and communicated openly with existing and potential workers.
- Front-line workers and volunteers are the most influential touch points to share the destination's stories and bring the vision to life.

Changing Expectations of Staff

- The pandemic affected migration and the availability of workers, and simultaneously a new generation entered the workforce requiring a different approach to employment.
- Gen Z are attracted to working in roles or businesses that are 'for purpose', have meaning, offer flexible work scheduling, have plenty of opportunities for feedback and offer career progression.

Changing Expectations of Visitors

- Expectations of what a 'good holiday' entails have shifted significantly.
- The delivery of exceptional visitor experiences needs to reflect changed travel motivations and needs.

Housing

- The lack of affordable and shared housing options affects the availability of workers.

Seasonality

- Commuting to the destination, and around the region during peak seasons is problematic for workers.
- Lack of public transport on active transport routes affects workers as well as residents.

Entrepreneurship & Innovation

- With the acceleration in local population and the global 'silent resignation' several new visitor facing ventures have launched in recent years.
- The appetite for more collaborative partnerships and support for entrepreneurs is strong.

Considerations

1. Support the activation of the **Visitor Economy Workforce Strategy.**
2. **Position employment opportunities on Phillip Island and San Remo as 'for purpose'** to inspire values aligned workers connecting them with destination's vision.
3. **Invest in values driven capacity building activities** to help workers understand the vision and deliver upon the destination's promise.
4. **Promote tourism career pathways** offering choice in role and employers.
5. **Work with schools and local higher education providers to promote tourism** as a values aligned career pathway.
6. **Explore housing options for seasonal workers,** including the option to billet or utilise current school housing.
7. **Confirm availability and promote short term, share accommodation** during peak periods.
8. **Advocate for transport options hat support worker movements in the destination, eg share rides,** to alleviate the issues around congestion and lack of affordable transport options.
9. **Partner with LauchVic** to kickstart visitor focused incubator projects.

THEME SIX

Addressing Seasonality Challenges

The boom and bust cycle has long threatened the sustainability of tourism businesses in the region, and is an enduring challenge for the environment.

Low season is reportedly getting busier due to the activation of off-peak events, and the increase of Visiting Friends and Relatives due to the growing population base.

Summer months and the Moto GP are still incredibly busy, with no perceived reduction of pressure felt by the community.

Demand for visitation over summer is likely to grow due to the population growth of Melbourne and the destination's close proximity to Melbourne.

Theme in Context

Low Season & Shoulder Seasons

- Many businesses close or scale back over quieter months, impacting the visitor experience.
- Events run in low season have been an ongoing focus for stakeholders.
- The *Growing Off Peak Events Strategy* was developed 2018 by BCSC. It's still a relevant plan.
- More recent funding by DPI has seen strategic planning undertaken for 4 events. Island Whale Festival, Tidal Seafood Festival and Festival of Stories are activated. The Wellness Event concept is yet to be activated. Challenges exist around these events resourcing, funding, scale and ongoing sustainability.
- Business Events are important as they bring people to the region midweek, and typically run outside of peak times.
- Sporting events that require minimum infrastructure (eg run/cycle/walk/ocean based) or using existing sporting infrastructure, that align to the destination's strengths and are run outside of peak season are a key opportunity.

Peak Season

- Ongoing demand for the destination's beaches over the summer is likely to continue. It's a long-standing issue, with impacts including traffic and parking congestion, rubbish and sensitive coastal damage.
- Cruise ships visit during peak months too, which has the potential to exacerbate established challenges if their strong growth continues.
- The optimum capacity for infrastructure endorsed in the VES2035 has been at odds with visitor modelling by stakeholders, has been taken out of context, misunderstood, and hindered the destination management around peak season.

Considerations

1. **Maintain focus on events as a low-season demand-driving and brand-building strategy.** Focus on the right events at the right time of year for the right visitors, that are resourced and governed sustainably, and are aligned to the destination's experience strengths.
2. **Year-round business events** focus.
3. **Year-round destination marketing** focus**,** with an Autumn, Winter, and Spring focus on storytelling and aligned visitors.
4. **Year-round opening mindset** for Tourism Businesses.
5. **Proactive visitor management & communication focus over Summer,** rather than driving demand at peak times.

Summer is the busiest period from November through to Easter, with main peaks over December and January School Holidays and Easter. May, June and August are the quietest months, with a slight increase over the Island Whale Festival weekend (July).

- PHILLIP ISLAND VIC, AUGUST 2023

"People naturally come to the area in the warmer months what we must find is the reason to make them come during the cooler months"

- COMMUNITY MEMBER, COMMUNITY SURVEY, JULY 2023

THEME SEVEN

Managing Visitor Movements

There is a strong aspiration for climate-friendly transport options for visitors.

There is a strong desire across all stakeholder groups to reduce reliance on cars to get to and around Phillip Island. However it is incredibly difficult to get to and around the Island if you don't have a car.

There are various needs and users of transport across the destination at different times of the year. It requires a mix of solutions to address both supply and demand side of the challenges, with several opportunities already in progress.

Theme in Context

Green Transport

- The transition towards electric vehicles, the electrifying of Phillip Island and the Island's small scale was a consistent opportunity identified by stakeholders.
- It presents new opportunities for the destination to lead in piloting electric transport solutions which would also support the visitor experience.

Public Transport Access

- It's a slow journey to get to the destination from Melbourne via public transport, with misaligned connections between rail, bus, train and Western Port Ferry from Cowes to Stoney Point.
- The lack of public transport around the region was a consistent concern.

Marine Access - Passenger Ferries, Cruise and Tours

- Major events are an opportunity to trial new transport pilots. The Western Port Ferry & Bus Shuttle combination of Moto GP race days received positive feedback.
- Cowes Jetty accessibility and visitor amenities are still a challenge, even with recent upgrades.

Car Ferry

- The Cowes to Stoney Point Car Ferry has been a long term, controversial project.
- The business case doesn't stack up and stakeholders have asked for its removal from the new DMP.

Cars, Parking, Roads & Traffic Congestion

- The Phillip Island 'Car Park' was a regularly shared anecdote. The bridge is a major pinch point at peak times.
- Paid parking is a long-standing and divisive issue. There was a positive sentiment towards paid parking subject to certain conditions.
- Cowes was noted by many as a traffic congestion hotspot. Smart Parking has recently been implemented in Cowes.
- There is community concern about the shortfall of car parking in Cowes with the Isle of Wight development, however the developers have a Green Travel Plan to help promote non-car travel.

On Island Touring

- Post pandemic has seen a growth of travellers in cars combined with a reduction in group tour coach travel.
- There are limited Tourism Operators providing land touring experiences within the destination
- There is no way to get to or from the Penguin Parade at night for local workers or visitors staying overnight.
- Cruise visit shuttles were noted as working in parts but had (at times) stranded visitors near the Race Track.
- Transport is a challenge for workers at peak times.

Tracks & Trails

- Connecting walking and cycling trail opportunities is a priority.
- The tracks and trails networks are communicated to visitors at key visitor servicing touchpoints, including the Phillip Island Visitor Map.
- Concerns were raised around the loss of natural landscapes and the impact on fragile natural landscapes around for building of trails (such as Cowes to Ventnor)

Wayfinding & Visitor Navigation

- Many different stakeholders and jurisdictions are responsible for signage. It's a complex issue to tackle that requires strong collaboration and alignment across relevant stakeholders and projects.
- Some businesses noted the challenge they faced in getting business/open signage on main highway between San Remo and the Penguin Parade.
- There was a sentiment that the welcome and feeling of arrival onto Phillip Island is missing, with many small cluttered signs of mixed messages.

Visitor Safety

- Safety of visitors not familiar with driving in the destination was raised.
- Night driving and risk of destroying wildlife is a significant issue.
- Google Maps are also sending visitors on roads not made for high-speed travel, which is a safety risk.
- Poor condition of roads was shared a consistent challenge.
- The blue line used during major events was not well understood by some people, which could potentially be a hazard.

Projects in Progress

Green Public Transport

- Many of the ideas and challenges heard by the community and industry would be supported through the activation of the *On Demand Transport Pilot Program*, which would support visitors to leave cars at their accommodation and use a fleet of bookable climate-friendly buses for door-to-door transport within the destination.
- The pilot is awaiting Victorian State Government funding and is well positioned for success as the Government is using it as a case study for other regions in Victoria.

Transport Planning & Alignment

- Bass Coast Shire is soon to commence the development of an *Integrated Transport Strategy*, which will unify connectivity issues for the destination.
- Placemaking projects, such as *Surf Beach and Sunderland Bay Road* and Drainage and **C***owes Mainstreet Master Plan* are addressing parking challenges.
- The *Cowes Streetscape Master Plan* is addressing some of the challenges around transport by favouring pedestrian and sustainable mobility.
- *San Remo Master Plan* is in its early stages and will be key to considering the visitor economy connectivity and transport challenges.
- The Bass Coast *Tracks and Trails Strategy* outlines tracks and trails for Phillip Island and San Remo that will support safe walking and cycling visitor movements. Priority trails underway are Cowes <> Rhyll and Cowes <> Ventnor.

Considerations

Existing Projects to Support

1. **Game Changer:** Advocate for funding for the On Demand Transport Pilot.
2. Unify Visitor Transport Issues via Integrated Transport Plan, the Sustainable Transport and Movement Team and Council Masterplans across Phillip Island and San Remo.

Green Transport Opportunities

1. Carbon-free travel to/from Melbourne
2. EV charging network tapping into the Island's battery
3. Electric Vehicles Hire - Cars, Scooters, eBikes
4. Shared/Pool Car Hire (eg Go Get)
5. Positive Impact and Green Public Transport (eg Latrobe Valley Bus Lines).
6. Incentives for visitors to leave their car parked, subject to alternative transport, tracks and trail options.
7. Share rides prioritised on congested roads during peak times.

Additional Opportunities

1. Signage audit activation/advocacy plan for key visitor arrival and wayfinding touch points.
2. Visitor communication plan, including promoting the use of relevant transport communication apps, such as Bass Coast Parking App.
3. Reducing speed limits at night
4. Safe visitor travel communications
5. Paid parking for visitors (resident exemption)
6. Encouraging vehicle sharing
7. Tap into School buses over summer when idle for shuttles.
8. Water-based transport/water taxis - San Remo - Rhyll - Cowes.
9. Active transport options that are visitor experiences - eg cycle tours.

THEME EIGHT

Attracting Values-Aligned Visitors

The community is strongly in favour of quality over quantity of visitors; those who stay overnight, slow down, appreciate the nature-based experiences, respect community social norms, care and contribute to the destination and travel outside of peak events and summer.

Tourism operator's values are aligned with the community, however, they also want visitors to spend money in local businesses, as that enables them to keep their doors open, provide local employment, and contribute to the vibrancy of the community for both residents and visitors.

Theme in Context

The Community seek 'Conscious' Visitors

The Phillip Island and San Remo communities and tourism industry want to attract visitors who:

- Slow down, and connect with local experiences, people and place
- Stay more than a day
- Motivated by the stories of the Island communities' actions to protect and care for their place
- Spend money with tourism businesses and the wider network of local businesses
- Care and contribute to the Island, helping leave it a better place (when enabled)
- Leave the car parked for their stay (when enabled)
- Respect community social norms (when clearly communicated)

Day Trips

- Consistent with the VES2035, there is still a strong desire across the community to convert more Day Trip visitors into overnight visitors
- The Island has a high percentage of day trip visitors (nearly 50% of domestic day trip visitors).
- The Penguin Parade is the hero experience to the Island with over 889,417 paid visitors in 2022/2023 (Annual Report 22/23) yet the lack of large-scale group accommodation in the region means this large day-trip market returns to Melbourne for their overnight accommodation.

Cruise

- Visits have grown strongly to the island with 11 arrivals between December 2022 and March 2023 *(Bass Coast Shire Economic Impact of Cruise Ships Report May 2023, 2035 VES goal was 5 vessels)*
- There is yet to be a conversation within the community about attracting Cruise Ships and whether it aligns with the community aspirations, as the Cruise sector has challenging eco and social credentials.

Business Events

- DPI partners with Business Events Victoria to attract this market.
- Phillip Island Hot Springs and Isle of Wight will help attract new, values-aligned visitors, and also help encourage longer stays on Island by both independent and group tour operators.
- However, attracting this market still remains a challenge due to the restricted supply in accommodation and large venues combined with impacts on business travel from Covid.

Self Drive Travellers

- Touring Routes support the attraction of longer-stay, self-drive visitors, including International visitors.
- Phillip Island is a partner in the Sydney to Melbourne Touring Alliance and the Go Beyond Melbourne Partnership which drive international drive visitors to the region.

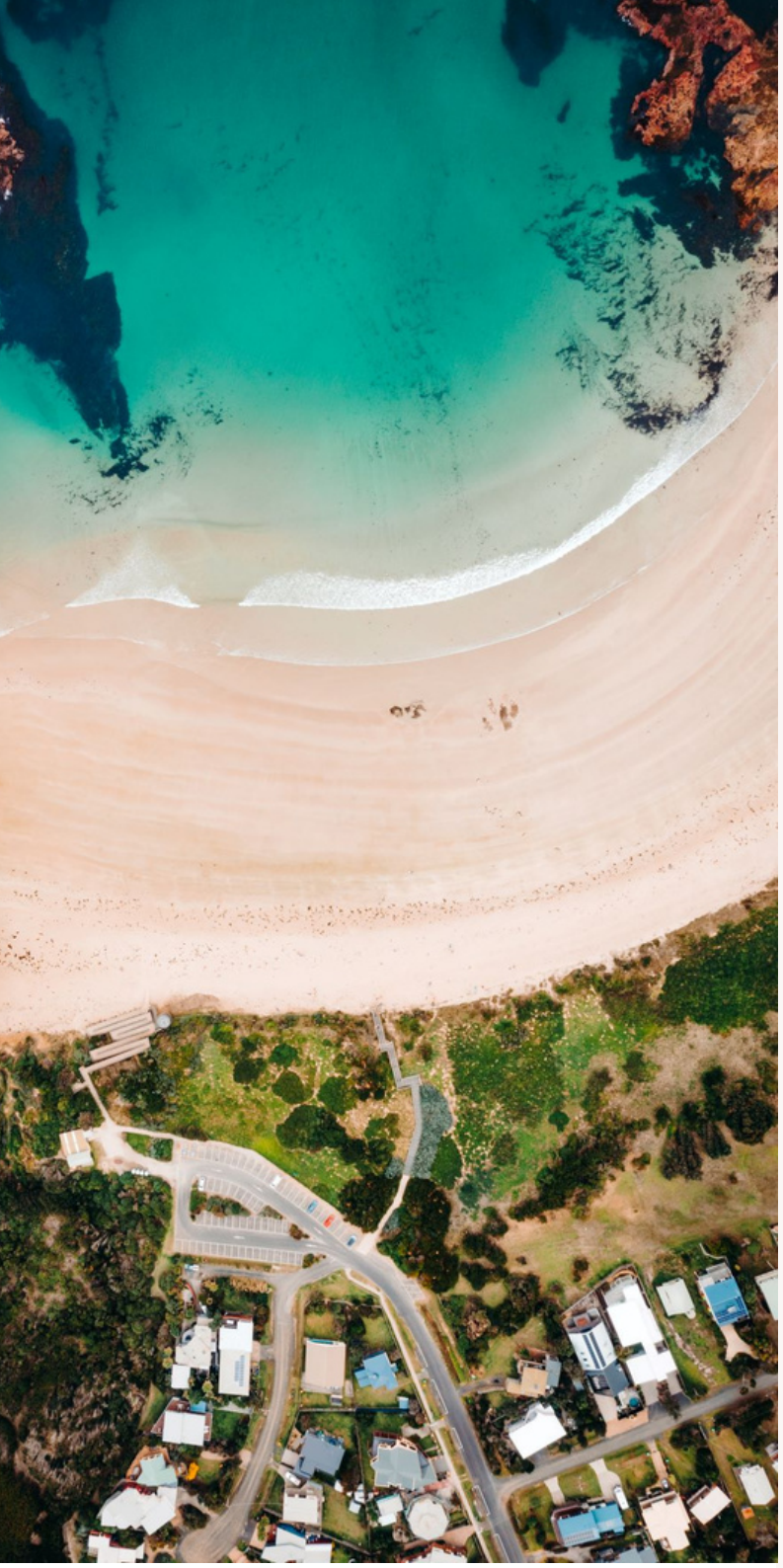
IMPORTANT NOTE

In the VES2035 a great deal of analysis was undertaken to unpack the opportunities across various market segments. It is challenging to reference the work undertaken in 2016 with regard to the alignment of markets due to the changed operating environment (as referenced in the Setting the Scene).

"It would be incredible if people were self-regulating when coming to the region. So rather than us having to try and implement things to restrict things when people are here, people know what the destination is about.

They know the story, they don't want to come here if they don't have the same values; environmental and sustainability. So we're attracting a more premium market that is prepared to travel a little differently."

- COMMUNITY MEMBER, JULY 2023



Market Considerations

- **Day trip visitors, including Tour Operators** - How to be a conscious visitor in a short time.
- **Summer beach holiday visitors** - How to enjoy the beaches, but also respect the local environment and community.
- **Moto GP** - How to travel differently to and around the event - green travel opportunities.
- **Local Residents** - Communication of the community values and shared vision, and encourage them to walk talk, and align to the same behaviours the community expects from visitors.
- **Business Events** - Positive impact/giving back/carbon positive. Low/Shoulder Season activation.
- **Culturally inclusive language and communications** with non-English speaking background visitors.
- Values aligned **Cruise** lines
- **Education** - connect, leverage and learn from incredible research and conservation projects happening on the Island. Activation of VES2035 actions paused due to COVID.
- **Road Trip Travellers** - slow down, stay longer and learn more of the positive impact story of the Island.
- **Accessibility** - With over 25% of travellers travelling with accessibility needs (*Tourism Australia, Future Demand of Travel 2022*), there is an important opportunity for Phillip Island and San Remo to be inviting and welcoming these visitors to the destination.

Considerations

1. **Review and realign Destination Visitor Personas** to reflect community and industry aspirations and values.
2. **Update and focus markets** to align with *Experience Victoria 2033* and *Tourism Australia (domestic + international)*, as well as other relevant visitor demand research.
3. **Confirm consistent and reliable data for visitor insights** to track the success of new DMP objectives.
4. **Align with neighbouring RTBs/VEPs** on values aligned tourism projects in their respective DMPs.
5. **Partner and collaborate with organisations** who drive demand from values-aligned visitors, including Business Events, Education, Cruise and Niche Interest Travel segments.

Synopsis of Strategic Themes

In 2016, the VES2035's determined the ambitious goal of being recognised nationally and globally as a world-leading sustainable tourism destination, where tourism is embraced by the community.

This synopsis outlines the overarching challenges and key opportunities as to the progress of achieving the vision, which is further unpacked throughout the 8 Strategic Themes detail pages.

Key Barriers to Achieving the Vision

Achieving World-Class Sustainability
While the island has made progress in sustainability initiatives, there is a recognition that more work is needed to reach a world-class standard in environmental practices and conservation.

Balancing Development & Conservation
Managing development on the island while preserving its natural assets and unique character is a challenge. Striking the right balance between growth and conservation is crucial.

Brand & Positioning
The destination's core brand positioning of wildlife, nature and regenerative practices may be perceived to be a challenge with the delivery of major motors with the de

Implementing Plans
The island has many good plans in place, but implementation is a significant barrier. The challenge lies in putting sustainable practices into action effectively, resourcing the actions and reporting the progress of projects contained within the plans.

Community Embracing Tourism
While the community's support of tourism is improving, there is still room for growth and further integration of sustainable tourism practices.

Many community members feel that all growth is negative, and as such are not in support of the visitor economy or any advancements/ developments in this space; regardless of the positive impact they may have on the environment, community and economy.

Communicating positive tourism stories, engaging with and involving the local community remains a challenge.

Ownership of Sustainable Goals
Identifying and prioritising clear and ambitious sustainability goals, such as biodiversity and environmental education, will enhance the island's reputation as a leading sustainable destination.

Advocacy
Maintaining positive relationships between key stakeholders at a local, state and federal levels will enable more effective advocacy for key destination outcomes.

Collaboration & Partnerships
Collaborating and activating strong partnerships between key stakeholders is vital for successfully achieving the actions recommended in the various strategic plans.

Rental/Housing Crisis
The rental and housing crisis across the destination poses a barrier to achieving growth targets, as it affects the community and available resources.

Traffic Management & Accessibility
Addressing traffic management and improving accessibility to the island, particularly onto the beach areas, is essential for sustainable tourism.

Introducing on-demand public transport, safe walking/cycling trails and ev hire options (cars, bikes, scooters) will help reduce the reliance on motor vehicles and enhance sustainability efforts.

Accommodation Quality & Availability
Ensuring better quality and sufficient accommodation options is important to support sustainable tourism growth and attract the desired high yield, values aligned markets.

SYNOPSIS OF COMMUNITY LISTENING

Tourism is widely recognised as a vital lifeline for the Phillip Island and Bass Coast communities, providing financial stability, enabling a dynamic and vibrant destination and enhancing the overall quality of life through improvements in public amenities, jobs creation and delivery of visitor services that benefit local communities.

Tensions arise, however, when some developments appear to threaten the sustainability of natural assets and species, and that for a brief period during the year, the Island is bursting at the seams exhausting community services, burdening public infrastructure and disrupting the laid back pace of life that many locals have come to cherish.

Next Steps

Share your Feedback

Your feedback on the Situation Analysis Snapshot is essential to shaping the updated Destination Management Plan for Phillip Island and San Remo.

Please email your feedback on this Snapshot to hello@tourismcollective.com.au by 5pm Friday 8th September 2023.

From there, all feedback will be reviewed and considered in the development of the draft Destination Management Plan which will be available for feedback from early October 2023.

Acknowledgments

Community & Industry Engagement

This Situation Analysis Snapshot has been prepared through extensive consultation with key tourism stakeholders across the community, industry, business and government.

The first stage of stakeholder input to the Report was gathered through the following sources during June – August 2023:

- Over 60 tourism operators and key stakeholders were involved in 7 face-to-face community and Council consultation workshops in and across the region (July & August 2023).
- Via 281 responses through online survey of residents, community groups, local government, industry and government staff (June-July 2023).
- 27 Individual Interviews were also conducted with key government and industry stakeholder organisations (June-August 2023).
- Read and referenced over 70 State, Regional and Local Plans and Reports.

REGIONAL & STATE	BASS COAST SHIRE COUNCIL	COMMUNITY	INDUSTRY
State • Department of Transport and Planning • DJSIR (Tourism Events and Priority Projects) • Parks Victoria • Victorian Tourism Industry Council • Visit Victoria **Regional** • Destination Gippsland • Destination Phillip Island • Phillip Island Conservation Society • Phillip Island Nature Parks • Regional Development Australia - Gippsland (Regional Development Victoria) • Regional Transport Gippsland **Consulting Partners** • Tilma Group • Regen Projects	• Councillors • Executive • Sustainable Environment • Infrastructure Maintenance • Place Making • Economic Development & Investment • Communications and Customer & Visitor Services, • Arts Culture and Heritage.	• Bass Coast Reconciliation Network • Phillip Island Land Care • Community and Environment Advisory Committee • Community Tourism Reference Group & Phillip Island History Society • Mas National • Phillip Island Business Network • Phillip Island Community and Learning Centre Inc (PICAL) • Phillip Island Conservation Society • Smiths Beachcomber Association • Phillip Island Nature Parks Board and Community & Environment Advisory Committee	• Alex Scott Real Estate • Bassine Specialty Cheeses • Bimbadeen Accomodation • Getaway Phillip Island • GMSB Enterprises • Host Easy BnB • MODA - Isle of Wight • National Vietnam Veterans Museum • North Pier Hotel • Ocean Reach Brewing • Phillip Island Chocolate Factory • Phillip Island Eco Tours • Phillip Island Hot Springs • Phillip Island Grand Prix Circuit • Phillip Island Nature Parks • Phillip Island Ocean Escape Retreats • Phillip Island Tenpin Bowling & Entertainment Centre • Ripples n Tonic Farmstay • Silverwater Resort • Tour Local • Wildlife Coast Cruises

Strategic References

Strategies, Plans & Reports

- Bass Coast Council Economic Development Discussion Paper
- Engage Bass Coast
- Bass Coast Growing Off-Peak Events Report
- Bass Coast Shire Accommodation Needs Assessment
- Bass Coast Shire Annual Action Plan 22 - 23
- Bass Coast Shire Arts + Culture Strategy 2019-2029
- Bass Coast Shire Community Vision 2041
- Bass Coast Shire Council Plan 21 - 2025
- Bass Coast Shire Council Reconciliation Actions
- Bass Coast Shire Economic Impact Report on Cruise May 2023
- Bass Coast Statement of Planning Policy (DRAFT) - Bass Coast Distinctive Area and Landscape, March 2022
- Bass Coast State of the Shire Report
- Bass Coast Strategic Review of Camping Needs
- Bass Coast Tracks and Trails Strategy
- Destination Phillip Island - various internal and public documents - Annual Reports, Advocacy Updates, Trade Manual, Recovery Plan, Marketing Toolkit, Customer Personas, Branding, Member Prospectus, Interstate Research Debrief, 101 Campaign Branding, Research, Insights, Regen Alliance Project, Visitor Guide, Tourism Trails, Event Guide
- Events Placement Program - Capacity & Capability Assessment
- Experience Victoria 2033
- Gippsland Destination Management Plan 2022
- Gippsland Regional Plan 20-25 (Summary and Full Document)
- Our Bass Coast, Our Future (Engagement for Community Vision)
- Phillip Island & San Remo Visitor Economy Strategy 2035
- Phillip Island & San Remo Visitor Economy Strategy 2035 - Technical Appendices
- Phillip Island and San Remo Visitor Economy Strategy 2035 - Growing Tourism Five-Year Summary Snapshot 2016 - 2021
- Phillip Island and San Remo Workforce Plan
- Phillip Island Nature Parks - Master Plan, Reconciliation Action Plan, Wildlife Management Plan
- Unlocking Rural Tourism Strategy
- Visit Victoria - Brand Playbook, Annual Report
- Visitor Economy Recovery Reform Plan - Victorian State Government
- Young Voices in Tourism

Data & Insights

- THRIVE 2030: The Re-Imagined Visitor Economy, Austrade, 2022
- Tourism Research Australia Forecasts for Australia 2022-2027
- Tourism GRP, GVA and Jobs data from 'The Economic Contribution of Tourism to Victoria's Regions 2021-2022', published July 2023 & the 'Economic Dashboard - Phillip Island 2021/22, report
- Tourism Businesses data from 'Tourism Businesses in Victoria as at June 2022, March 2023' Report
- Tourism Australia Future Demand of Global Travel
- Population and Dwelling Data, Census (accessed August 2023)
- Visitor yield and profile data from 'Victorian Tourism Statistics YE March 2023' data supplied by the Tourism and Events Research Unit, DJSIR, June 2023.
- Visitor Purpose for Travel data has been extracted from the most recent Tourism Research Australia Phillip Island Profile (2018/2019)
- Victoria's Tourism Performance, Year End March 2023
- International Data supplied by TEVER on 18 August 2023, via eDM (quoting Australian Bureau of Statistics data as at 17/8/23)

THE TOURISM COLLECTIVE

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Disclaimer

The content within this report is based on comprehensive research and engagement with the destination's community and industry stakeholders (see *Acknowledgements*).
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