

Phillip Island & San Remo Destination Management Plan

TOWARDS 2033



DESTINATION
**PHILLIP
ISLAND**



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We acknowledge the Traditional Custodians of this land, the Bunurong people and pay respects to their Elders past, present 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.

We understand there is a growing interest from global and domestic markets to learn about and connect with First Nations culture and stories through travel experiences.

We also acknowledge and support First Nation's right to self-determination. As such, there are no specific measures or key performance indicators (KPIs) that are attributed to First Nations outcomes within this plan, rather these actions will be co-created as relationships and a common purpose is established.

Foreword



Traditional Owners, residents, visitors, local industry and other stakeholders all have a deep connection to Phillip Island (Millowl) and San Remo.

Since 2016 the directions set in the Phillip Island and San Remo Visitor Economy Strategy, have focused on sustaining and celebrating our environment whilst supporting sensitive development to create a thriving tourism industry that is supported by our community. We are pleased that many of the initiatives set out in this plan have been delivered or are in development.

In more recent years our world has experienced unprecedented interruption rendering the need for an updated plan to support our tourism industry continue to rebound and support the region's economy. The opportunity to refocus and rebuild our aspirations for the region has been an important milestone in our journey.

As stewards of this destination, we recognise that a vibrant tourism industry supports our region's economic prosperity and contributes to the liveability of the region. We embrace and understand the intrinsic link between the environment, our community and the tourism industry which all form part of the extensive Tourism Ecosystem that we are part of.

This plan is based on an agile management framework which will foster inspiring regenerative tourism practices, support environmentally sympathetic development and grow the value of our visitor economy in collaboration with our stakeholders and community.

Destination Phillip Island values the support of our industry and our key partners, the Bass Coast Shire, Phillip Island Nature Parks and the State Government, whom have all played a key role in developing this Destination Management Plan.

We look forward to continuing to work together towards achieving the vibrant visitor economy in this beautiful sustainable and highly liveable destination.

Kim Storey
General Manager
Destination Phillip Island



Bass Coast is progressive, pristine and passionate.

Our townships are vibrant, rich with culture and full of life, each area with its own distinct character. Drawing on community, creativity, innovation and resilience, we are creating a thriving and diverse economy in one of Australia's most beautiful destinations.

We proudly acknowledge we are on Bunurong Country and build on learnings from our First Peoples and their knowledge. Those who have cared for country over the millennia have ensured that we continue to enjoy the unique flora and fauna, and ecosystems that aren't found anywhere else on the planet. We are committed to reconciliation.

Bass Coast is blessed with a symbiotic relationship between its coastline, hinterland and its diverse, creative community. We are proud of our region's story of conservation, and we know there is much more to be done to ensure future generations can enjoy our special place.

This Phillip Island and San Remo Destination Management Plan Towards 2033 sets out to go beyond the sustainable management of place to having a regenerative mindset. We want to ensure that our environment continues to thrive, our businesses are leaders in doing what's right, and that our stories, history and rich culture are celebrated and shared with our visitors from all over the world.

Tourism will always play an important role in the economic, social, and cultural fabric of Bass Coast. We are proud to work with our key partners in realising the best version of our special place.

Clare Le Serve
Mayor
Bass Coast Shire Council



Phillip Island Nature Parks is privileged to play a role in caring for country on Millowli.

We are inspired by our Purpose to 'protect nature for wildlife and inspire people to act' and driven by a business model that funds conservation from funds generated, delivering engaging eco-tourism experiences.

Our model and ethos align seamlessly with the principles and focus of the Phillip Island and San Remo Destination Management Plan, and we look forward to working with our partners at Destination Phillip Island, Bass Coast Shire Council, tourism industry operators and the broader community to help to bring this plan to life.

Importantly, we heard through the development of the plan that our community and industry both recognise that our environment is our economy and something that we must nurture to ensure a thriving community in the future.

This plan treads a careful balance between supporting economic growth through environmentally sensitive development and high-value visitor attraction, whilst promoting a regenerative mindset within the tourism industry.

If we achieve this plan, our beautiful region will certainly be a world-recognised model for sustainable and regenerative tourism.

Catherine Basterfield
Chief Executive Officer
Phillip Island Nature Parks

SECTION ONE

Introduction



Purpose of this Destination Management Plan

The purpose of this Destination Management Plan (DMP) is to recognise and realise the full value of tourism by ensuring it is a positive force for people, nature, and our economy over the next 10 years.

The ultimate aim is to create lasting, net-positive impacts and support a thriving tourism sector.

It is designed as a framework that will evolve over time to provide strategies and measure success to guide tourism management and its impacts on our community.

Phillip Island & San Remo require a dedicated plan for place-based stewardship.

For over a century, Australian and International visitors have created memories on Phillip Island & San Remo, and will continue to identify the region as a genuine tourism destination for generations to come.

Being one of Australia's most tourism-reliant destinations, and operating a visitor economy within a compact geography presents a myriad of ongoing and distinctive challenges for the local community and industry.

This coupled with a strong reliance on environmental assets to deliver upon the visitor promise, requires a bespoke and collaborative approach to destination management.

Collectively, community and industry stakeholders are very well-versed in tourism and have long campaigned and planned for a balanced, sustainable approach to tourism; taking strong action to plan for, mitigate and respond to climate and biodiversity impacts on the environment, whilst safeguarding their businesses, jobs, livelihoods and overall quality of life.

Maintaining an equilibrium for the impact of tourism is paramount, and is the single biggest priority for the destination.

The Victorian Government established a new framework for destination management boards, which will be established in the coming years and repositioned to Visitor Economy Partnerships (VEP).

At the time of publishing this DMP, it is uncertain what Visitor Economy Partnership structure will look after the Phillip Island and San Remo region.

It is paramount this plan sits above the outcome of this determination, and any other ongoing changes to the political landscape.

This is a genuine place-based plan, where the aspirations have been determined by those who matter most - the local community and local tourism industry.

This includes the ongoing nurturing, investment and activation of the nationally and globally recognised Phillip Island brand, which must remain a priority regardless of changes so as to support the State's ambitions and the tourism-dependent Phillip Island region economy.



This DMP has also been informed by, builds upon and supersedes the Phillip Island & San Remo Visitor Economy Strategy 2035 (VES2035), and draws on the most up-to-date collective intelligence across all key stakeholders to ensure the plan remains balanced and strategic.

This plan also draws inspiration and insights from global destinations facing similar challenges, particularly those of island geography and reliance on tourism to underpin the local economy.

With a multitude of projects and initiatives already in train, this plan doesn't seek to create more work for stakeholders, rather, it seeks to embed a regional mindset for tourism, uncover synergies to align resources, connect the dots between stakeholder priorities to improve outcomes, and unite stakeholders in the pursuit of tourism for the region.

This DMP is governed by an agreed purpose, values and mindset which will be achieved through collective action. Agreed priorities and accountabilities are outlined for stakeholders, which are underpinned by a set of values-aligned principles.

There is an additional body of work that sits behind this Plan in a *DMP Implementation Appendix* (a separate document for stakeholders implementing the plan), which provides background insights for the considerations outlined within each of the Principles, in addition to recommendations to activate a Stewardship Approach to governance.

This DMP has purposefully been designed to be agile and should be self-fulfilling, to remain a relevant framework throughout the entirety of its lifespan and beyond.

The DMP is a roadmap designed to guide our pursuit of tourism over the next decade. It should be approached as a comprehensive strategic analysis of the opportunity we have before us and as a future-facing framework to achieve the balance and prosperity our community seeks.

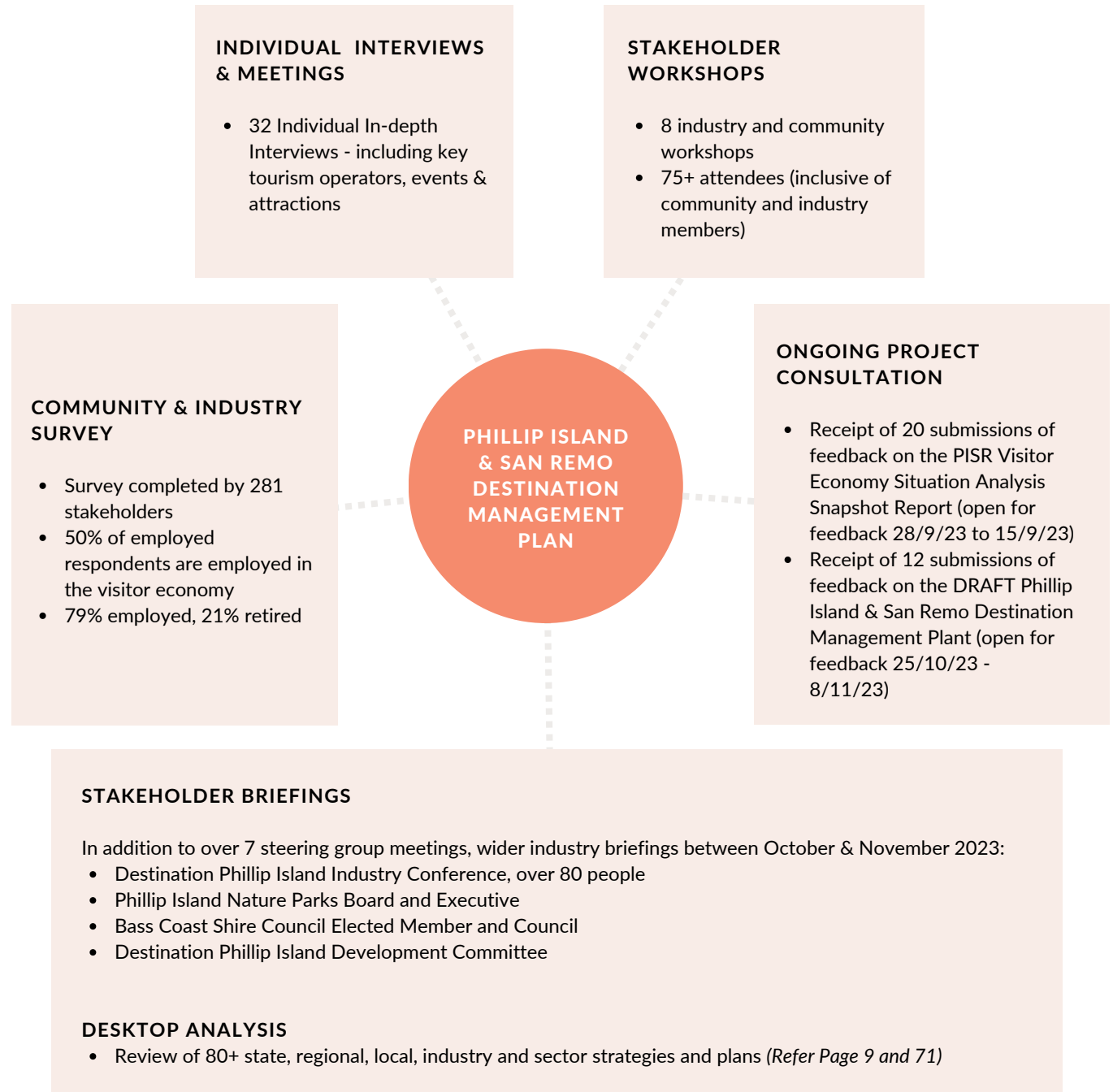
PLAN DEVELOPMENT PROCESS

The development of this plan has been sponsored by Destination Phillip Island (DPI) and supported by a Steering Committee including representatives from the Bass Coast Shire Council (BCSC), Phillip Island Nature Parks (Nature Parks) and the Department of Jobs, Skills, Industry & Regions (DJSIR).

From June 2023, the Steering Committee invited the community to embark on a 6-month project that consulted over 400 people across multiple forms of listening and feedback. This has ensured this DMP is a true reflection of the aspirations of the Phillip Island & San Remo community and its tourism stakeholders.

Underpinning the plan is a considered, ongoing engagement and consultation process, activating divergent and convergent thinking to arrive at agreed-upon considerations.

When reading this DMP, it is important to know that a comprehensive *DMP Implementation Appendix* (a separate document) also sits alongside this DMP, and will be used by Plan stakeholders responsible for implementing the Plan.



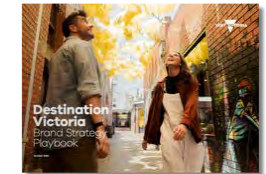
STRATEGIC ALIGNMENT

There are many interconnected parts of the tourism ecosystem in Phillip Island & San Remo.

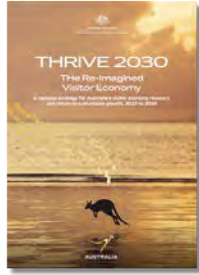
The intention for this DMP is to uncover synergies to align resources and connect the dots between stakeholder priorities at a local, regional, state and national level in order to improve outcomes, reduce and mitigate risk and unite stakeholders in all efforts as it relates to tourism in the region.

The DMP honours and builds on the work of the VES2035, and is enabled and informed by the following stakeholder policies, plans and frameworks, enabling the activation of the priorities and accountabilities required to achieve the overarching shared purpose.

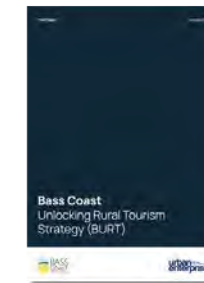
Following are the strategic documents that this DMP has the most significant alignment with. An additional 80+ strategic plans have been read and referenced, with some highlighted in the Action Plan where specific alignments exist. Refer to Strategic References in the Support Information at the end of this document for a full list.



	Phillip Island and San Remo Visitor Economy Strategy 2035 (VES2035, including Technical Appendix)	Bass Coast Shire Council's Economic Development Framework 2030	Experience Victoria 2033	Destination Victoria Brand Strategy Playbook
Document Relevance	This strategy provided a vision and actions for Phillip Island and San Remo to develop tourism in a socially, economically and environmentally sustainable way between 2017 - 2023.	Released November 2023, this Framework outlines Council's plan to increase opportunities for business, employment and education whilst supporting the ongoing economic wellbeing of the community.	Released in June 2023, the State Government's strategic plan for tourism, and aims to shape the future of all of Victoria's visitor economy over the next 10 years by strengthening the State's tourism offerings.	Visit Victoria's new state-wide brand framework, highlighting what makes Victoria and the sub regions different and compelling. It is the foundation for all domestic and international communication activities.
Alignment to this DMP	Relevant actions, yet to be activated or completed, have been mapped into this new DMP.	This DMP directly aligns to the Framework, and provides further details on the visitor economy actions within the Framework.	This DMP directly aligns with Brand, Marketing and Experience Development. Refer pages 29-30, 45 and 49.	This DMP directly aligns with Brand and Marketing. Refer pages 29-30 and 45-46.



THRIVE 2030	Bass Coast Community Vision 2041	Bass Coast Shire Council Plan 2021-2025	Bass Coast Climate Change Action Plan 2020-2030
<p>Australia's national strategy for the long-term, sustainable growth of the visitor economy, most recently updated in March 2023.</p>	<p>Adopted in September 2021, the Community Vision was developed by a community panel and forms part of council's strategic reports and frameworks.</p>	<p>Released November 2023, this Framework outlines Council's plan to increase opportunities for business, employment and education whilst supporting the ongoing economic wellbeing of the community. This DMP directly aligns to the Framework, and provides further details on the visitor economy actions within the Framework.</p>	<p>In response to a community petition, council declared a climate emergency in 2019. This Plan was then developed and identifies a number of actions that community, businesses/industries and Council can undertake to achieve the objective of zero net emissions over the next 10 years.</p>



Towards 2030 Gippsland Destination Management Plan - A Blueprint for Growth	Bass Coast Shire Growing Off Peak Events	Destination Phillip Island - Phillip Island and San Remo Visitor Economy Workforce Plan	Bass Coast Unlocking Rural Tourism Strategy
<p>Updated in February 2022, this strategic tourism plan identifies opportunities for the Gippsland region that can be leveraged to support tourism and facilitate economic growth in a sustainable manner for the region.</p>	<p>Released in 2018, a plan that remains relevant and outlines strategies to drive visitation to the destination through events outside of peak season.</p>	<p>Released in December 2022, this plan outlines strategies to attract and retain an adaptive workforce for Phillip Island and San Remo.</p>	<p>Released in January 2023, the strategy seeks to facilitate sustainable tourism development in appropriately located rural areas. It was developed in response to feedback from various sectors of the community that the current controls in the planning scheme are insufficient to effectively manage tourism proposals outside our townships.</p>

Phrases & Concepts to Know

In recent years, there's been a significant shift in how destinations approach and engage with tourism.

This change has led to the emergence of fresh concepts and terminology that outline the steps needed to ensure tourism benefits the greater good.

TERM	DESCRIPTION	PLAN RELEVANCE
Regenerative Tourism	<i>Regenerative Tourism</i> is an emerging concept within the field of sustainable tourism that goes beyond traditional sustainability principles. It focuses on restoring and revitalizing ecosystems, cultures, and communities through responsible travel and tourism practices. <i>Learn more “A Regenerative Approach to Tourism” by Destination Canada.</i>	This plan seeks to embed a regenerative mindset, which will underpin how decisions are made, and how this plan is governed and implemented.
Stewardship	<i>Stewardship</i> is an approach to governance that seeks to balance and meet the economic, environmental, and social/cultural needs of a destination; whilst operating within a legitimate governance model with active participation from the public and private sectors, as well as the local community*.	In this plan, a Stewardship Model for Governance is outlined, which ultimately activates the plan’s mindset of being regenerative and agile.
Positive Impact Tourism	<i>Positive Impact Tourism</i> is a term that generally refers to a form of tourism that prioritises and actively seeks to create positive social, environmental, and economic outcomes for the destinations visited, and the communities and ecosystems.	There is a strong focus for activating projects that seek to create positive impact outcomes for Phillip Island & San Remo throughout this plan.
Value of Tourism	<i>The Value of Tourism</i> is multifaceted, and its assessment involves a combination of economic indicators, social metrics, environmental assessments and cultural evaluations.	Our community and stakeholders are dedicated to realising the full value of tourism, emphasising that it extends beyond the traditional focus on volume and yield metrics. For Phillip Island & San Remo, the genuine value of tourism is attained when all performance indicators are moving in a positive direction.
Climate Action	<i>Climate Action</i> refers to a range of measures, strategies, policies, and initiatives taken at the local, national, and global levels to address climate change and reduce its negative impacts on the environment and society.	Our community and stakeholders are well down this path, and are continuing to activate opportunities to drive positive change through the implementation of climate active initiatives. This remains a major priority throughout the plan’s activations.
Tourism Ecosystem	A <i>Tourism Ecosystem</i> is represents the interconnected and interdependent stakeholders and their relationships that contribute to and are influenced by the tourism industry within a specific geographic area or destination.	For such a small destination, we have a very complex and interconnected system, with many strong relationships already in place, and when they are continued to develop, will enable the success of the plan.
Visitor Economy	The <i>Visitor Economy</i> is a term used to describe the economic activities and impact generated by visitors, including tourists and travelers, in a particular region or country. The visitor economy covers all related spending, which contributes to the overall economic well-being of the destination.	This term is used in this document to highlight the economic importance of tourism and the related industries in Phillip Island & San Remo, emphasising the role of visitors in stimulating economic growth and job creation.

SECTION TWO

Current State



Forces Shaping the Tourism Ecosystem

The tourism landscape is constantly evolving.

Understanding the opportunity that global and national movements and megatrends present, helps inform a proactive response locally to build a sustainable future for Phillip Island & San Remo.

Values-Aligned & Experiential Travel Dominates Demand

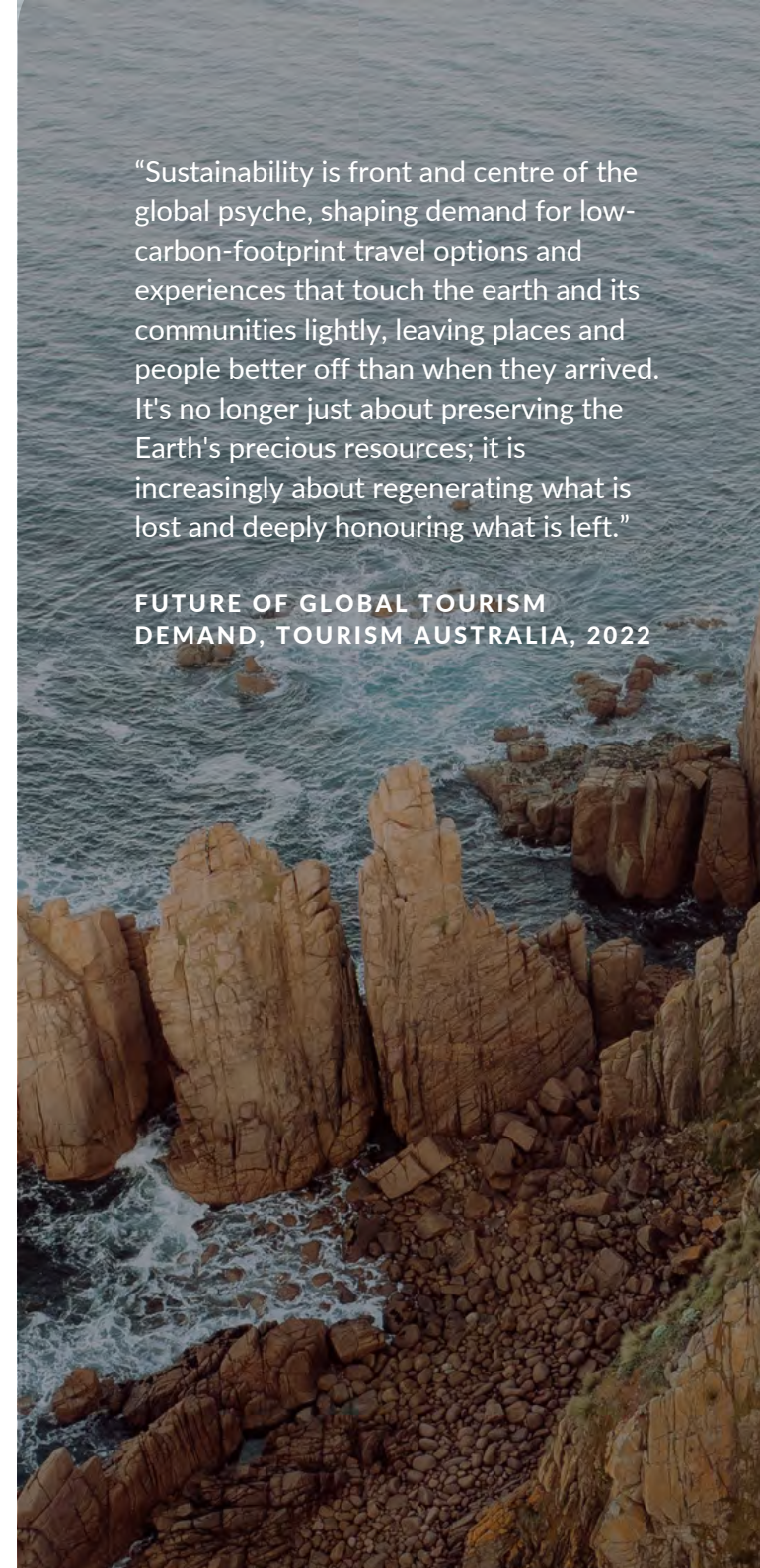
The lockdown events throughout the pandemic created a seismic shift in people's connection to self, others, and the environment. It catalysed a growing demand for transparency, diversity and equality across all facets of society, community and business.

As 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.

Experiential tourism, the opportunity to connect with local cultures and communities, is quickly becoming one of the fastest-growing sectors in the travel industry, driven by a growing demand from travellers for unique, authentic, and transformative experiences. This type of travel aligns with personal values and allows visitors to experience the local way of life, enjoy local produce, and actively connect with communities, resulting in more meaningful memories.

“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**





Climate Change

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 and having lasting impacts on local communities livelihoods and the environment which is used to support the visitor economy.

Purposeful Travel

Aligning with this demand for experiential travel is the desire for consumers to seek out purpose-led brands, and sustainable travel options as society's collective conscience grows around social inclusion, and environmental conservation.

Sustainability is now an embedded mindset for travellers as the pandemic has sharpened society's awareness of tourism's impact on communities and the environment. Destinations and tourism operators will have to adjust their experience design and marketing messaging to support the increasing cohort of people actively seeking sustainable tourism experiences.

In time, travellers will become more aware, and align destination and experience choices with their changing perspectives and will journey to destinations where they can have a positive impact on communities.

Economic Uncertainty

This DMP is being released during incredibly tense economic conditions across Australia.

Australia is currently experiencing record levels of inflation as a result of knock-on effects from the COVID-19 pandemic, global economic conditions, commodity price volatility, geo-political unrest, and strong consumer demand for travel.

As a result of high inflation, households and businesses alike are feeling the pinch. This is ultimately putting more pressure on businesses to do more with less, operating with competitive uncertainty, whilst also delivering value for their guests.

This, coupled with the national workforce skills and labour challenge, means that the 350,000 micro-small tourism businesses across Australia* are operating with limited capacity, which is leading to fatigue and burnout, and in some cases, the closure of tourism enterprises.

At the same time, visitors are still investing in travel experiences (with over a third of Australians already planning a domestic leisure flight in the next 3 months[^]), but they will be looking for increased value and have greater expectations, which poses an additional challenge to businesses, especially given the workforce challenges.

*Tourism Research Australia, [Tourism Businesses 2017-2022](#)

[^][Deloitte State of the Consumer Tracker, Consumer Behaviour Trends](#)

The Disrupted & Digitised Travel Journey

At the start of the pandemic, society vaulted several years forward in consumer and business digital adoption in a matter of around eight weeks.*

Furthermore, the infusion of AI into the tourism industry has revolutionised the way people travel and how custodians care for destinations.

These innovations have had a significant impact on how people travel. Touchpoints are supercharged, instant engagement and conversions are expected, and demand for new and fresh inspirational content is amplified.

Business travel landscape has also been impacted by technology, with an increasing number of businesses transitioning seamlessly into online meetings.

Technologies offer remarkable opportunities for both supply and demand side and also unlocks data-driven insights that enable dynamic decision-making.

For destinations, it's essential to acknowledge and leverage digital tech advancements, to increase opportunities to communicate with visitors, and also to optimise resources particularly around content creation and visitor servicing.

*McKinsey & Co Research > <https://www.mckinsey.com/capabilities/strategy-and-corporate-finance/our-insights/how-covid-19-has-pushed-companies-over-the-technology-tipping-point-and-transformed-business-forever>

Housing Supply

The pandemic has had a distinct impact on the overall dynamic of the Australian housing market.

After an extremely buoyant housing market throughout the pandemic, and the rise of the sharing economy (AirBnB), regional communities are increasingly experiencing challenges finding suitable short and long-term housing for employees.

This is hampering business growth, and adding to owner fatigue, which is resulting in a compromised visitor experience, and the threat of businesses closing their doors.

Workforce Availability & Skills

The nation is still working toward the recovery of a depleted and displaced workforce across all industries.

With tourism economy one of the hardest hit industries, many workers left the sector in pursuit of financial security, and haven't found their way back.

This coupled with a slow-to-return international worker base, means finding skilled staff is still an ever-present challenge.

Competition for Visitors

The domestic travel market is now mobilising without friction, with many Australians now activating their plans for international travel. Therefore, competition for the domestic visitor, especially for regional destinations, is becoming fierce.



Our Special Place

Nestled in the Bass Strait in the southeast of Victoria, Phillip Island (Millowl) & San Remo is a place that reminds us of the delicate balance between humanity and the natural world.

Home to the Bunurong People who have continued connection and care of its lands and waters for the last 60,000 years, European settlement arrived in early 1800s with Churchill Island the site of Victoria's first European settlement.

For our current residents, daily life unfolds against a backdrop of unparalleled natural beauty. From the rugged cliffs of Cape Woolamai to the tranquil beaches of Cowes, this coastal paradise provides a unique and treasured setting for everyday existence.

Our close-knit community shares an unwavering sense of unity and purpose centred around a common respect and love for our environment and an unyielding commitment to its preservation. Our community's collective pride in our natural treasures serves as the bedrock upon which a sustainable way of life is built.

It's not just the residents who are drawn to our special place; the destination has been enchanting a diverse mix of visitors from around the globe for over a century.

People love visiting Phillip Island & San Remo for all the same reasons that make it special to our community; immersing in the picturesque landscapes, wildlife encounters, outdoor adventures, and local culture, and world renown events, all within a tranquil and accessible coastal setting.

But it's the warmth of the interactions visitors have with our community and environment which creates long-lasting memories that draw them back time and again.

Our community works collaboratively to enable visitors to have a positive impact on our community and environment, with long-serving aspirations for visitors to seek deeper connections to our story.



PHILLIP ISLAND (MILLOWL) & SAN REMO

Understanding the Value of Tourism

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

Our community also believes that tourism improves civic pride, provides financial support for conservation and environmental protection, and contributes to the improvement of public amenities.

Community, Industry & Environment

Our community and industry believes that tourism contributes positively to their livelihoods and to the environment.

Their united priorities for tourism (as heard through listening) include:

- Protect natural resources and promote sustainable growth.
- Improve infrastructure and transportation.
- Diversify tourism offerings and attract a wider range of visitors.
- Preserve the region's unique natural beauty and wildlife.
- Support local businesses and encourage strategic investment.
- Foster collaboration for a balanced and visionary approach.

Stakeholders are already activating many projects that seek to drive positive outcomes for our community and environment.

Each contains objectives and measurement outcomes that seek to enable a positive benefit from tourism for the environment and community.



Community & Industry Perspectives*

BARRIERS TO SUCCESS

- **Overdevelopment:** Pressure from developers, unchecked development, and loss of rural appeal.
- **Housing Availability:** Lack of affordable housing.
- **Infrastructure and Amenities:** Insufficient roads, parking, public transport, recreational facilities.
- **Traffic Congestion:** Congestion on roads, especially during peak times.
- **Lack of Knowledge:** Limited understanding of sustainable tourism and environmental preservation.
- **Governance Concerns:** Council decisions prioritising development over community consultation and environmental protection.

FUTURE OUTLOOK

- Preserve natural ecology, beauty, and wildlife while avoiding overdevelopment.
- Embrace sustainability, eco-tourism, and renewable energy practices.
- Balance growth and tourism with the region's unique environment.
- Enhance community well-being through affordable housing, amenities, and job opportunities.
- Foster a close-knit community that values Indigenous heritage and First Nations experiences.
- Improve infrastructure, transportation, and recreational facilities to support a thriving, inclusive destination.^[2]

*Insights derived from Phillip Island and San Remo Community & Industry Visioning Survey, June 2023, n=281 (50% Tourism Industry responses & 50% Local residents not working in tourism).



Economy

In 2021/22 tourism accounted for \$388m (26.8%) of Gross Regional Product (GRP), \$340m (25.3%) of Gross Value Added (GVA) and 5,400 (39.3%) of Filled Jobs, making Phillip Island & San Remo the most tourism-reliant region in Victoria, and the fourth most tourism-reliant destination in Australia, behind Lasseter (Central Aus.), Kangaroo Island (South Aus.) and East Coast (Tasmania)^.

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

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

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



GROSS REGIONAL PRODUCT

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



FILLED JOBS

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



BUSINESSES

608 Traditional Tourism Businesses
One-third are micro-businesses
+21.9% since 2019

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

Current Visitor Profile

Domestic overnight visitors are driving our recovery, contributing close to double the yield to that of pre-pandemic levels (growing by 70%) as of June 2023.

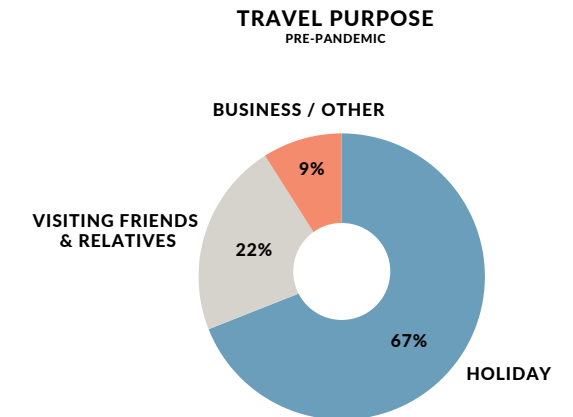
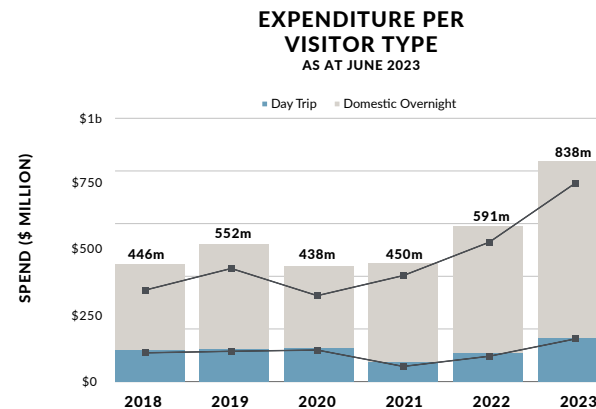
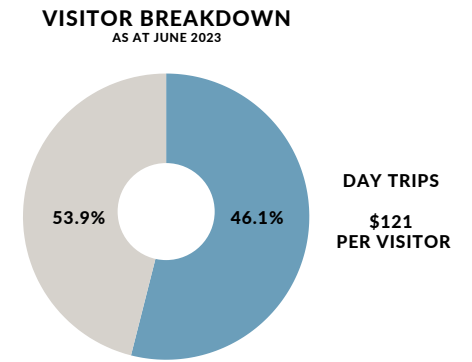
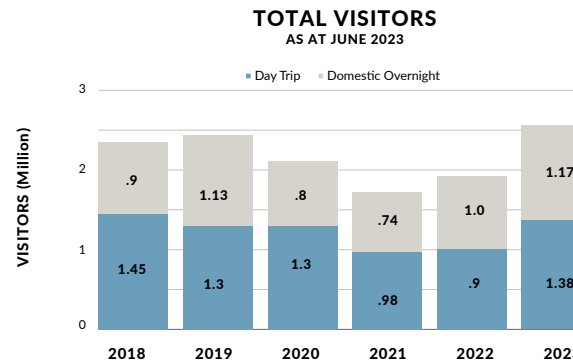
Domestic Visitors

We have experienced a strong recovery from COVID-19 which has been headlined by growth in domestic overnight stays, with year-on-year growth from 2022-2023 of 33% accounting for 46% of total visitation.

Further to this, domestic day trips (approximately 54% of total visitors) have also picked up to surpass pre-pandemic levels, up 6% from 2019-2023, with yield from this market up 32% in the same timeframe.

Whilst day trip visitors are yielding more than pre-pandemic (at \$121 per visitor), domestic overnight visitors remain the highest-yielding market with the average spend per visitor at \$570, with Interstate Visitors the highest value domestic segment.

Post-COVID, the average spend per overnight visitor (\$189) is just shy of the VES2035 target of \$195.



Visitor yield and profile data from 'Victorian Tourism Statistics Year End (YE) June 2023' data supplied by the Tourism and Events Research Unit, DJSIR, September 2023. Note. Phillip Island Region includes all of Bass Coast region.

International Visitors

Historically, we hosted an average of 67,000 international overnight visitors contributing approximately \$27m in expenditure (equating to \$402 per visitor, staying 3.43 nights).*

As at June 2023 quarter, we hosted 55,000 international visitors, which remains a 45% reduction on numbers from June 2019 quarter.**

Nature Parks reported the sale of 160,833 international visitor tickets to the Penguin Parade during 2022/2023.^

Results for the six months to June 2023 indicate that both Melbourne and regional Victoria are more than halfway back to recovery for the key metrics of spend, visitors, and nights.

International visitation is headlined by strong return of visitors from New Zealand (nearly fully recovered), India (yield and visits above pre-pandemic levels), UK (back to 75% of pre-pandemic levels of spend, headlined by VFR and holiday) US (back to 84% of pre-pandemic levels and staying longer) and China (largest international source market for spend, but only back to 12% of pre-pandemic levels).

The return of international visitors is picking up pace and is expected to accelerate further this year. However, both Melbourne and regional Victoria were lagging behind other national cities and regional Australia's recovery performance.^

Travel Purpose

Pre-COVID, visitors were travelling to the region predominantly for holiday purposes (69%), along with visiting friends and relatives (VFR) (22%). The remainder is a mix of business and other travel (9%).

For Victoria, holiday travel has led the recovery of domestic travel with overnight spend (+54%), visitors (+5%), and nights (+10%) in this purpose category all above the pre-pandemic performance in the year ending June 2023.

Domestic overnight spend in the visiting friends and relatives (VFR) segment has also fully recovered above the pre-pandemic level (+37%), as well as the business purpose category (+19%). However, overnight visitors numbers from both of these segments are yet to fully recover with VFR just below the pre-pandemic result (-5%) and business still well below (-19%).^^

*Historical International Visitor Data extracted from Phillip Island Satellite Account, 2018-2019

** International Visitor yield data from 'Places and Attractions Data - IVS and NVS June 2023' supplied by the Tourism and Events Research Unit, DJSIR, September 2023

^Nature Parks, Visitor Profile Data, 2022/2023

^^Visitor Purpose for Travel data has been extracted from the most recent Tourism Research Australia Phillip Island Profile (2018/2019) and 'Victoria's Tourism Performance YE June 2023, data supplied by the Tourism and Events Research Unit, DJSIR, September 2023



Our Tourism Ecosystem

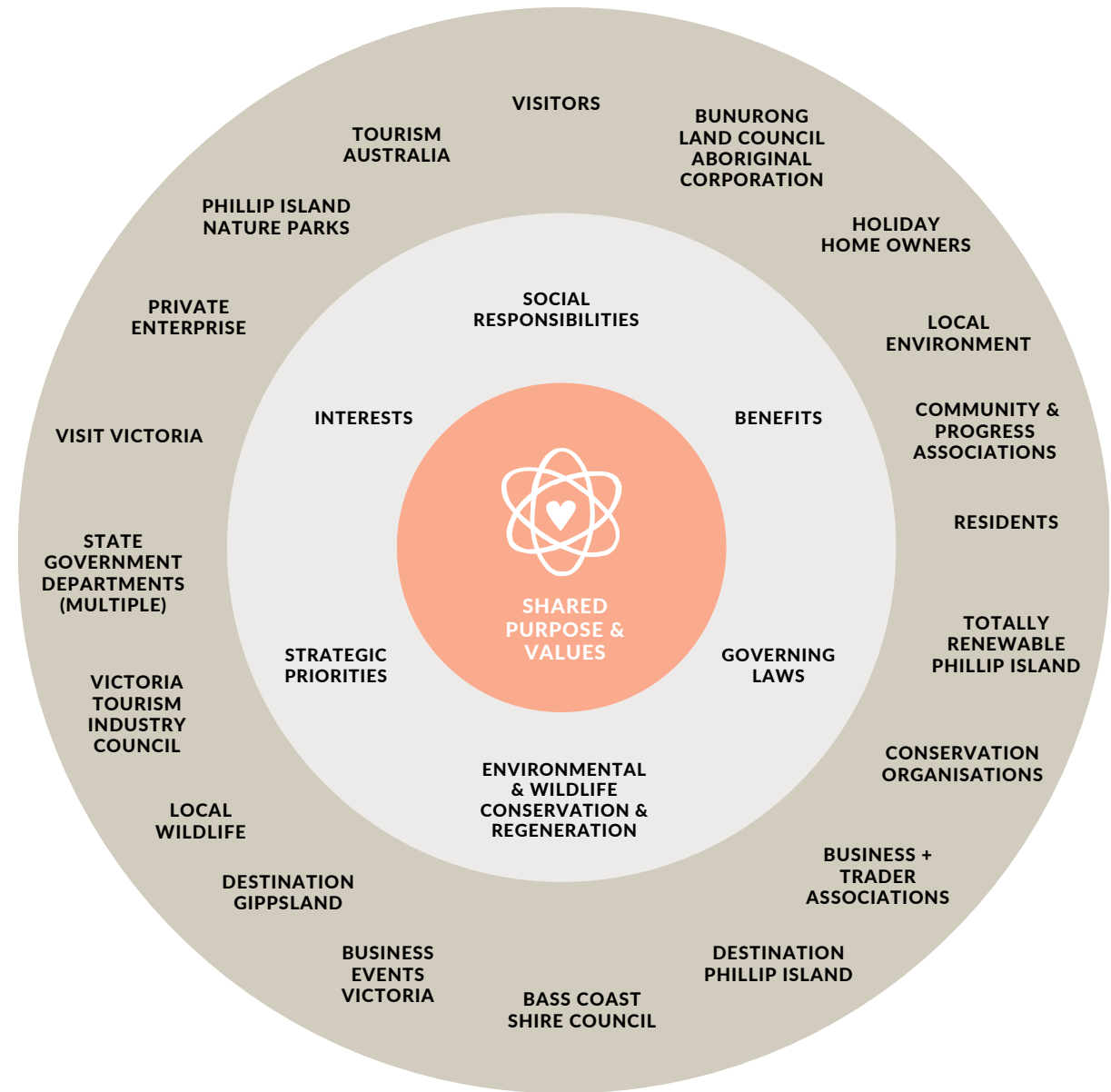
This stakeholder map illustrates the interdependent and interconnected relationships that exist within the tourism sector for Phillip Island & San Remo, and the many entities that are impacted, or benefit directly or indirectly from tourism.

Importantly, this ecosystem is nonhierarchical, whereby every stakeholder is considered an imperative part of the system.

Building a resilient ecosystem for tourism relies on the agreement and understanding of a Place-Based shared purpose and values, from which all stakeholders find common ground.

Effective management and collaboration among all stakeholders are essential to create a sustainable and resilient tourism ecosystem that benefits both visitors and the destination itself.

This approach considers the long-term health and prosperity of all elements within the ecosystem.



Current State Synopsis

This synopsis outlines the key challenges and opportunities relating to the vision set out in the VES2035, and details ways to align efforts across the region and refocus priorities for the years ahead.

Sensitive Growth & Development

Managing development on Phillip Island while preserving its natural assets and unique character is a constant challenge. Striking the right balance between sensitive and values aligned growth and conservation is crucial.

Despite the destination's reliance on tourism for jobs and revenue, some community members feel that growth is negative, and consistently oppose tourism developments regardless of the positive impact they may have on the environment, community and/ or economy.

The Phillip Island population experienced a 32% growth from 10,387 in 2016 to 13,799 in 2021; exceeding the 2026 targets forecast in the VES2035. In contrast, the total number of dwellings did not grow at the same rate with only a 12% growth from 2016 to 12,569 in 2021, trailing behind growth predictions contained within the VES2035. Interestingly occupied dwellings grew 8.5 percentage points from 37.8% in 2016 to 46.3% in 2021.[^]

This accelerated population growth, as well as the large proportion of unoccupied dwellings (53.7% compared to 11.1% state average) may be contributing to the sense of angst facing the community.[^]

The Bass Coast Unlocking Rural Tourism Strategy, and being recognised in 2019 as a Distinctive Area and Landscape under Park 3AAB of the Planning and Environment Act 1987, should assist the community to feel that appropriate safeguards are in place to protect areas that require it and allow for sensitive developments in others.

Sustainability Goals

In 2016, the VES2035 committed to the ambitious vision of being recognised nationally and globally as a world-leading sustainable tourism destination, where tourism is embraced by the community.

This strategy had clear aspirations and goals around Global Recognition for Conservation, with key sustainable tourism and benchmarking to the Global Sustainable Tourism Council (GSTC) - Game Changer Priority 1.

GSTC accreditation was initially pursued with the destination reaching Bronze Benchmark in 2019. However, in early 2023 BCSC made the decision to pursue Eco Tourism Australia Destination Accreditation, to align with the wider regional focus.

BCSC has demonstrated leadership in biodiversity, circular economy, sustainability and climate change and should be looked to for inspiration and guidance in future regenerative tourism programs.

Additionally, Nature Parks are working towards improved ecosystems, re-vegetation programs and remain strongly committed to reconciliation and improved methods to 'Care for Country' in partnership with Bunurong people.

[^]Population and Dwelling Data, Census (accessed August 2023)

Brand Positioning & Positive Storytelling

The destination's core brand positioning is of wildlife, nature and regenerative practices. However, we recognise the destinations proud history in delivering major motorsport events.

While the motorsport opportunity poses a brand positioning challenge, it also provides a global audience to share the stories of the destination. This plan embraces this challenge and opportunity.

Activation, Advocacy & Partnerships

The destination has many current plans and strategies but resourcing, activating and implementation prove a significant barrier. The challenge lies in putting sustainable practices into action effectively, resourcing the actions and widely reporting the progress of projects contained within the plans.

Utilising the new brand positioning from Visit Victoria and the campaign messaging of Phillip Island 101 km² can support a range of targeted storytelling for the destination.

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

Peak Season & Major Event Capacity

Addressing traffic management and improving accessibility to and within the island and coastal areas, particularly during peak season, is essential for positive destination management.

Alleviating the boom and bust cycle of visitation will support the sustainability of tourism enterprises and year-round employment for locals. It will also help to address the pressure felt by tourism businesses who are already at capacity during this time, as well as the impacts from over-tourism at key environmental and community infrastructure across the region.

Diversifying the visitor mix (domestic and international visitation) and supporting the development of year-round visitor experiences will help flatten the demand for visitation over the summer months, and throughout school holidays.

The availability of suitably qualified workforce is also a significant challenge faced by the region which is exasperated during peak season and major events. The limited supply of workers means the volunteer pool is often stretched beyond capacity, which is another issue the region grapples with throughout the year.

Accommodation Quality & Availability

Ensuring better quality and sufficient accommodation options is important to support sustainable tourism growth and attract the desired high-value and values-aligned markets.

Whilst the prevalence of holiday rental properties in the region provides options for overnight stays and a potential increase in yield, it can be a barrier to new commercial investment, which is also impacting worker accommodation.

A number of projects are currently being developed that will assist with meeting demand in peak season as well as attract values-aligned visitors in the future.

The rental and housing crisis across the destination poses a significant barrier to achieving growth targets. A great deal of work is underway across all tiers of Government to address this challenge.

An aerial photograph of a coastal landscape. The top half shows turquoise ocean water with white foam from waves breaking onto a wide, sandy beach. The bottom half shows a steep, rocky hillside covered in dark, scrubby vegetation. A paved road winds along the edge of the hillside, curving towards the right. In the distance, a small parking lot with several cars is visible on the hillside.

SECTION THREE

Strategy & Action Plan

STRATEGY ON A PAGE

Purpose	Tourism for the Greater Good				
Values	We support sustainable growth. We are empowered to drive positive impact through tourism. We are collaborative and inclusive. We value quality over quantity. We encourage slowing down.				
Overarching Aspirations	COMMUNITY We love where we live, and enjoy sharing our place with visitors. We understand who we are, and our visitors do too.	ENVIRONMENT We are leaders of positive impact initiatives that are contributing towards the regeneration of our land, water and wildlife.	VISITOR We attract high value, values aligned visitors, who contribute towards positive impact programs and have a deep sense of connection with place.	ECONOMY We want to grow the net value of the visitor economy to support a innovative, vibrant and resilient business community.	INDUSTRY Local businesses are thriving, feel supported by an engaged and skilled workforce, and continually evolve to support visitor expectations.
Our Strengths	Nature, Marine & Wildlife. Authentic Regenerative Culture. Vibe & Geography. Proximity to Melbourne. World-Class Events.				
Audiences	We welcome all visitors, with a focus on attracting High Value, Values Aligned Visitors.				
Key Principles (5)	1. Building a Resilient Tourism Ecosystem	2. Caring for our Environment & Community	3. Sharing our Story with Impact	4. Enhance our Visitor Experiences	5. Improve Visitor Movements
Focus Areas (32)	1.1 Plan Governance 1.2 Research & Insights 1.3 DMP Project Funding 1.4 Destination Advocacy 1.5 Industry Partner Program 1.6 Community Engagement 1.7 Emergency Preparedness	2.1 Visitor & Community Contribution 2.2 Positive-Impact Destination Leaders 2.3 First Peoples Partnerships 2.4 Positive-Impact Visitor Experiences & Events 2.5 Positive Visitor & Community Behaviours	3.1 Phillip Island/San Remo Story 3.2 Brand Marketing 3.3 Markets & Sector Partnerships 3.4 Visitor Collateral 3.5 Visitor Welcome Programme	4.1 Experience Development 4.2 Quality Accommodation 4.3 Major Events 4.4 Local & Community Events 4.5 Industry Capability Building 4.6 Workforce Development 4.7 Destination Planning 4.8 Planning Frameworks 4.9 Short Stay Accommodation 4.10 Major Projects	5.1 Short Visit Vehicle Contribution 5.2 Electric Vehicle Network 5.3 Active & Public Transport 5.4 Integrated Transport Planning 5.5 Marine Infrastructure
Enablers of Success	We will apply a Stewardship Approach to Plan Governance A regenerative and agile mindset will underpin our decision making Focus will be on whole of plan Accountability, instead of individual task responsibility Continuous Improvement will enable us to maintain a dynamic, evolving Plan Establishing community voice opportunities will support engagement to maintain social license Governance will be galvanized by strong stakeholder partnerships working collectively to achieve our purpose				

Our Purpose & Aspirations for Tourism

INDUSTRY

Local businesses are thriving, feel supported by an engaged and skilled workforce, and continually evolve to support visitor expectations.

ENVIRONMENT

We are leaders of positive impact initiatives that are contributing towards the regeneration of our land, water and wildlife.

ECONOMY

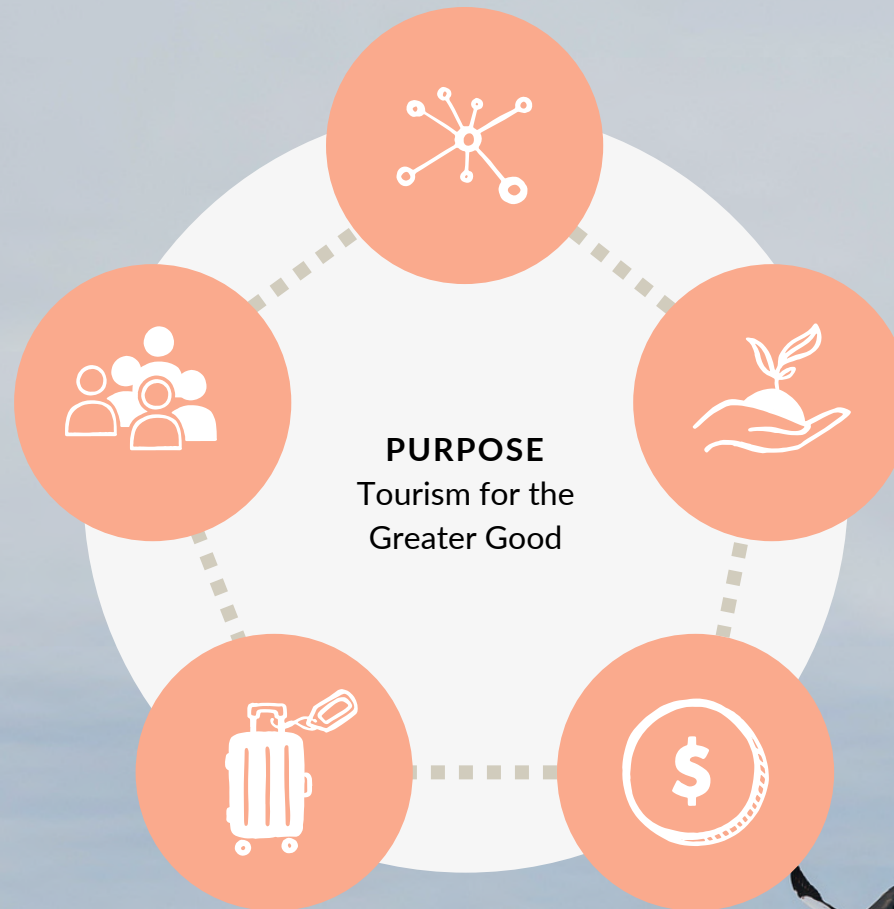
We want to grow the net value of the visitor economy to support an innovative, vibrant and resilient business community.

COMMUNITY

We love where we live, and enjoy sharing our place with visitors. We understand who we are, and our visitors do too.

VISITOR

We attract high value, values aligned visitors, who contribute towards positive impact programs and have a deep sense of connection with place.



Our Values

Our values guide who we are, what we believe and how we behave.

Having a united commitment to addressing challenges across the region that threaten the balance between the visitor, community, environment and economy is essential to achieve our purpose.

These co-created values will help inform all decision making acting as a lens to consider future actions and projects that align with focus areas of this plan.



WE SUPPORT SUSTAINABLE GROWTH

We are committed to securing a liveable and healthy future for our community through sustainable tourism growth and sensitive development.



WE ARE EMPOWERED TO DRIVE POSITIVE IMPACT THROUGH TOURISM

Tourism can help the destination to achieve its sustainability and regenerative goals. We respect the actions of past custodians and honour them in our regenerative practices for a thriving destination for all.



WE ARE COLLABORATIVE & INCLUSIVE

We work together to achieve a common purpose and put our different agendas aside. It is our strength in numbers that will drive positive change, requiring maturity, trust and regular open dialogue. We are inclusive, welcome new ideas and remain open minded to possibilities that emerge.



WE VALUE QUALITY OVER QUANTITY

We welcome all people, celebrating and supporting diversity, inclusion and uniqueness. To deliver upon our strengths and visitor promise, attracting values-aligned visitors is essential and should be the priority over attracting volume markets.



WE ENCOURAGE SLOWING DOWN

We encourage visitors to pause, notice our incredible landscapes, the abundant wildlife, the change of seasons, and embrace our way of life and the unique rhythm that makes our place truly special.

Our Strengths

Renowned for our rugged beaches, enriching landscapes, abundant wildlife encounters, world-class events and nostalgic summer getaways, we have created lasting memories for a diverse mix of visitors from Australia and abroad since the 1880s.

It is these strengths, along with our community's unwavering commitment to environmental regeneration that form our visitor promise, and set us apart from other similar Victorian coastal, nature-based destinations.

We communicate our unique Phillip Island strengths in our own regional campaigns and marketing programs with the support of our Phillip Island 101 assets (refer page 30).

We also work in collaboration with Visit Victoria to activate "Victoria's Island Sanctuary" Regional sub-brand which is part of the state-wide master brand framework (refer pages 31 & 32) to reach domestic and international markets.



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 hands-on and passionate local community has been committed to the conservation of the environment and wildlife 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. The buzz and vibrancy that comes over summer and major events is exciting and adds an additional drawcard for the destination for a small proportion of the year.



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.

Our Visitor Brand

Phillip Island, as a travel destination brand, has built strong international and domestic credibility, attracting visitors for many decades.

Nurturing and activating the Phillip Island brand, and the stories that reflect the destination's place, and people must remain a priority, regardless of changes to Victoria's visitor economy governance landscape, to support the State's ambitions and the tourism-dependent Phillip Island region economy.

The current visual representation of the destination brand is our tourism award-winning "*Phillip Island 101 square kilometres of amazing*", a brand awareness campaign that is a platform for our industry to share our unique and diverse stories of place, and attract our high values, values-aligned visitors through Destination Phillip Island's annual regional marketing activities.



ONE AMAZING PLACE

Our Story

Welcome to Victoria's Phillip Island.
You might have heard it's home to thousands of Little Penguins and one hell of a Grand Prix.
But that's just the tip of the island.
Across 101km² there's so much to see and do,
so we've created the Phillip Island 101,
your guide to every square kilometre of amazing.
From a surf in the morning to a splash of red at the winery,
From the chocolatey-est rocky road to our sun-drenched Seal Rocks,
this is the place to rest and re-invigorate.
So the big question now isn't where do you start, but, why does it have to end?
101km² of amazing is waiting on Phillip Island.

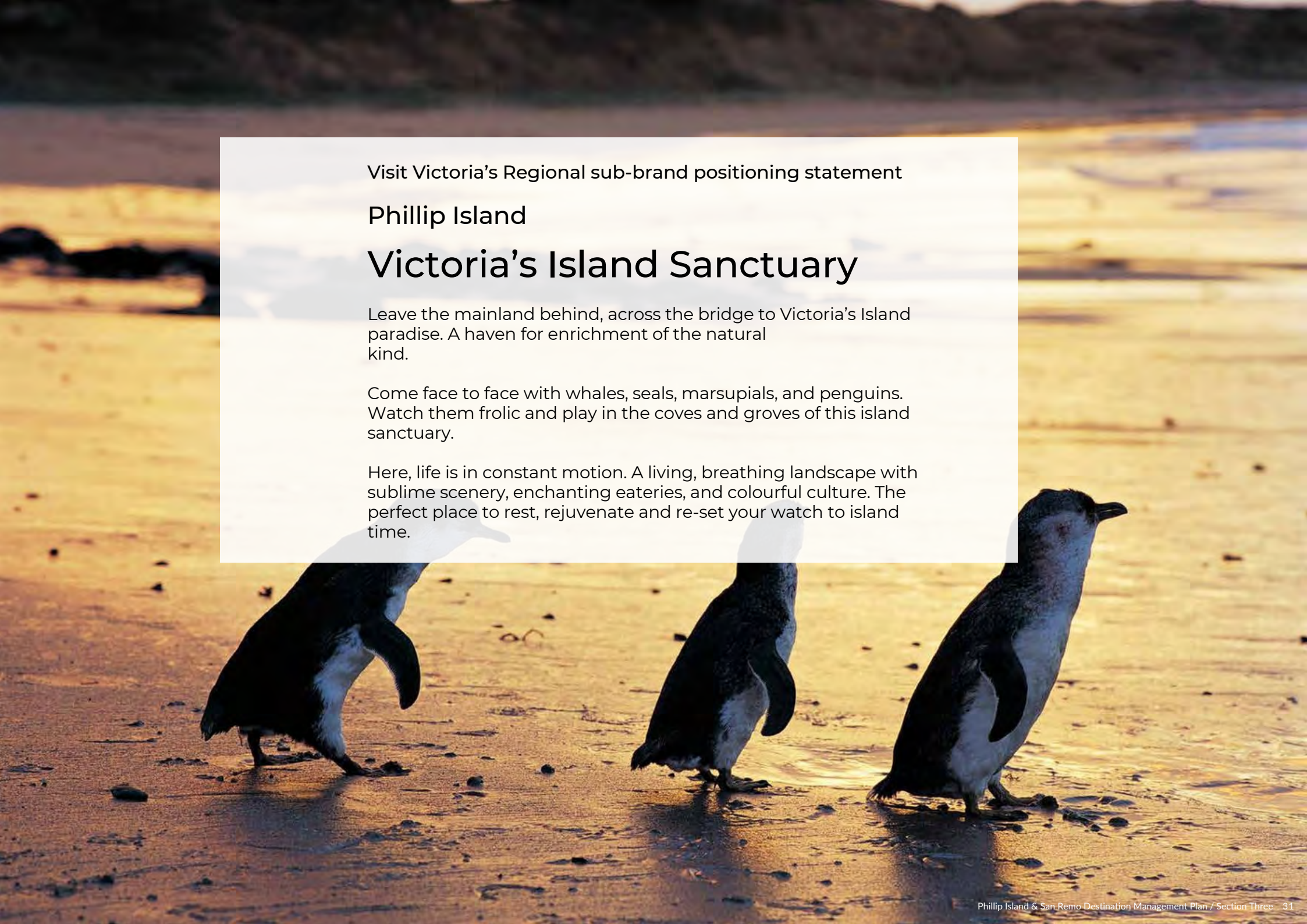
Our Imagery

Scenic and Spacious
Wonder and Discovery
Authentic Experiences

Voice of the Island

Just like the island itself, our tone of voice is inviting and inspiring.
We always have a positive energy that's a little playful.
When we talk, it's like we can't wait to tell a good friend about our favourite places.
With so much to see and do, we're here to bring a sense of wonder and discovery, opening people's eyes to the beauty and attractions on our island.



A photograph of three penguins walking on a sandy beach at sunset. The penguins are in the foreground, walking from left to right. The background shows the ocean and a bright sunset sky. The text is overlaid on a white semi-transparent box in the upper left quadrant.

Visit Victoria's Regional sub-brand positioning statement

Phillip Island

Victoria's Island Sanctuary

Leave the mainland behind, across the bridge to Victoria's Island paradise. A haven for enrichment of the natural kind.

Come face to face with whales, seals, marsupials, and penguins. Watch them frolic and play in the coves and groves of this island sanctuary.

Here, life is in constant motion. A living, breathing landscape with sublime scenery, enchanting eateries, and colourful culture. The perfect place to rest, rejuvenate and re-set your watch to island time.

Visit Victoria's Regional sub-brand framework

Phillip Island

Visitation drivers	Escape my everyday Surprise and delight me Spark my imagination		
Victorian Masterbrand promise Phillip Island sub-brand promise	Enrich every moment in Victoria's island sanctuary		
Pillars	Nature at your fingertips <ul style="list-style-type: none"> • Coastal walks and beaches • Ocean adventures: surfing, kayaking, fishing • Australia's wildlife, bird watching, wetlands • Nature parks, stargazing 	Passion for quality <ul style="list-style-type: none"> • Events and festivals • Attractions and family adventure • Food and drink experiences • Artisans • Attractions 	Storied culture <ul style="list-style-type: none"> • First Peoples cultural experiences • Eco tourism, sustainability, conservation and research leadership • Surf culture and history • Museums
Proof points	<ul style="list-style-type: none"> • Cape Woolamai, Pyramid Rock, Summerland's Point, Cat Bay, Smiths Beach, Shelly Beach • Sea Kayak Australia • Penguin Parade & Koala Conservation Reserve, Wildlife Coast Cruises • Phillip Island Nature Park 	<ul style="list-style-type: none"> • MotoGP, World Superbikes, Island Whale Festival, Ocean Sounds Music Festival • A Maze'N Things, Phillip Island Go Karting • Phillip Island Winery, Ocean Reach Brewery, Bass Strait Direct, Purple Hen Winery, San Remo Fisherman's Co-Operative • Bassine Specialty Cheeses, Phillip Island Strawberries, Phillip Island Chocolate Factory • Phillip Island Helicopters 	<ul style="list-style-type: none"> • Millowl (Phillip Island) • Churchill Island • Whale Discovery Trail • Island Surfboards • National Vietnam Veterans Museum
Personality traits	Open-minded Creative Intriguing		

Attracting High Value & Values Aligned Visitors

We welcome everyone who wants to visit our Island home in a respectful way.

However given our capacity challenges, attracting more visitors to the region only makes sense if a visitor's values match our values – essentially, those who want to have a positive impact on our people and place.

To achieve our aspirations, we will work collaboratively with all stakeholders to ensure visitors learn about our values, our people, and our place, and can experience our destination's DNA first hand.

Values-Aligned Focus

To achieve our shared purpose and aspirations, a collective effort is required to drive visitation from those who understand and align with our values.

These visitors are typically those who:

- Slow down, and connect with local experiences, people and place.
- Are seeking a sense of belonging or connectedness to the region.
- Are responsible travellers who want to care for the land, 'give back' to the community, and environment.
- Understand and look to participate in local social norms.
- Stay more than one day, and invest in experiences

Importantly, these visitors are not aligned by age, gender, or location, but rather by values, and motivations for travel experiences.

To actively target these visitors, we will make incremental changes to the stories we share about our people and place, and the experiences we develop to build awareness and engage visitors in our destination's DNA.

Strategic Activation

To attract more high-value and values-aligned visitors we will work in partnership with Visit Victoria to align strategic priorities around personas, markets, and positioning to generate maximum impact.

At a grassroots level, we will support our industry to create stronger linkages between our values and the stories we share with visitors and further align and enhance our visitor experiences to support our visitors to make great travel choices.

We will assess market alignment dynamically, and seek to attract a diversified mix of visitors across Holiday, Business, and VFR travel and look to fill seasonal troughs through strategic programs and tactical levers, including annual Visit Victoria and Tourism Australia domestic and international initiatives.

Local intelligence along with qualified data and insights will enable us to make informed decisions and proactively plan strategic responses to opportunities.

New segment and market opportunities will also be pursued over time as new and improved visitor experiences come online.

"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



Guiding Principles to Achieve our Purpose

Five strategic Guiding Principles form the basis of this Plan and inform key focus areas from which a series of agreed priorities, and accountabilities are derived. It is these principles that guide our actions to achieve our purpose.

Regardless of the economic climate, world disorder or Government platform, the Guiding Principles and correlated Focus Areas shall remain.

The actions, considerations, and Annual Action Plan have the agility to flex and adapt to external forces, whilst still being laser-focused on the common purpose for tourism for the greater good.



ACTION PLAN GLOSSARY

TERM	DESCRIPTION
Focus Area	Areas that have been identified as priorities for the destination to realise it's purpose.
Key Outcome	The intended qualitative objective for each Focus Area.
Considerations	Thought starters, ideas and insights to guide the activation of the Focus Area.
Possible Activations & Projects	The word 'possible' is used as these projects should be viewed as considerations, and activated if the external conditions are in alignment. Their prioritising, resourcing, timeframes and key performance indicators are developed in the Annual DMP Action Plan .
Key Stakeholders	Stakeholder(s) responsible for activating the Focus Area
Role(s)	Stakeholder(s) role in activating the Focus Area (Leadership, Deliver, Partner, Advocacy, Education)
Timeframe	Recommended activation timeframe



PRINCIPLE ONE

Building a Resilient Tourism Ecosystem

We are strengthened by respectful collaboration and open communication as we strive towards a common goal.

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

The complication of varying governing frameworks, decision-making mechanisms, diverse visions, and limited resources are impediments that need to be addressed in order to set the region up for success.

Given the local community and business sector are so heavily invested in tourism, a comprehensive community engagement program must be activated to keep people informed of the achievements of tourism-related activities, and informed of the value tourism brings in their local community.

With a revitalised focus on regenerative tourism, there is an opportunity for DPI's Industry Partner Program to reflect the purpose and aspirations of this Plan. Building a resilient tourism industry that aligns to a common purpose will strengthen the destination's brand positioning and experience delivery.

Advocating on behalf of the destination will help align Government Policy with destination needs, as well as allow for diverse funding opportunities to activate the projects scoped from the plan.

A consistent and agile approach to emergency, crisis and climate action response is required to support the destination's resilience and ability to meet the demands moving forward.

SDG ALIGNMENT



PRINCIPLE ONE / ACTION PLAN

#	Focus Area	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
1.1	Plan Governance	The DMP is activated, reviewed and managed through a Stewardship Governance Model	<ul style="list-style-type: none"> An <i>Accountability Framework</i> is endorsed, to guide how this DMP will be activated, projects prioritised and managed, reviewed and updated. This includes enabling a Community Voice into relevant activations and projects. A <i>Stakeholder Engagement Framework</i> confirmed for the DMP, to proactively engage and communicate with the destination's stakeholders. <i>Agile Project Management</i> activated to deliver confirmed Activations/Projects quickly and efficiently while remaining responsive to stakeholder needs, market trends and new challenges/opportunities. 	<p>Accountability Framework</p> <p>Stakeholder Engagement Framework</p> <p>Agile Project Management</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	Deliver	Immediate then Ongoing.
1.2	Research and Insights	The DMP's Success Framework has relevant qualitative and quantitative data to benchmark, measure and report on the achievement of the Plan's aspirations and purpose.	<ul style="list-style-type: none"> Activate existing (Industry, Economic) and new measures (Visitor, Community, Environment) for measurement of the <i>DMP Success Framework</i> Set up measurement mechanisms to gather data as per the DMP Success Framework Subject to funding, a Visitor Exit survey is an opportunity to collect visitor insights and sentiment, and how the destination is going in attracting the high values, values aligned visitors. Existing data collection of industry could be potentially leveraged. This could be activated through the destination's accommodation properties (commercial and short stay) and key tour operators and attractions. Look at options to create a Measurement Dashboard to track and record data in a centralised format, accessible for all stakeholders to easily monitor and report progress. 	<p>Annual Community Sentiment Pulse</p> <p>Visitor Exit Survey</p> <p>Industry Sentiment Survey</p> <p>Annual DMP Reporting</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	Deliver	2023/2024
1.3	DMP Project Funding	External funding is secured for Priority Projects identified in the DMP Annual Action Plan.	<ul style="list-style-type: none"> Whilst there are many Possible Activations and Projects that can be achieved with current resources, it is anticipated that grant funding will be required to activate some of the Projects identified within the Annual Action Plan. Federal and State Grant landscape has changed significantly since the change in Governments, and have a strong focus on grant probity Grants Strategy development required to build knowledge and identify opportunities to activate the projects prioritised within the Annual Action Plan. Grant application process to be undertaken by specific Project Leads. Look for grant opportunities outside of traditional tourism funding programs. 	<p>Relevant grants identified and applied for.</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	Partner	Ongoing

PRINCIPLE ONE / ACTION PLAN, CONT.

#	Focus Area	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
1.4	Destination Advocacy	A proactive and united approach to advocate by DMP Custodians to regional, state and federal entities on issues & opportunities impacting the delivery of this Plan.	<ul style="list-style-type: none"> DMP Custodians take a proactive approach to provide a united voice to advocate on issues (supply and demand side) affecting the achievement of the DMP's purpose and aspirations. A core activity is DMP Custodians maintaining relationships with key stakeholders who are located outside of the destination (regional, industry sector-specific, state and federal) Key stakeholders include Victorian Tourism Industry Council, State Government Departments (eg Visit Victoria, Department of Transport, ParksVic etc), regional (eg Regional Development Victoria). Opportunities invest \$ in a strategic partnership with VTIC to align and act on regional advocacy priorities This also includes unified, place-based feedback and voice to state and national tourism issues as requested or as identified by local community and industry. Opportunity for collective advocacy with other Victorian Regions who share similar challenges as required. The lead on advocacy issues to be determined by the DMP Custodians on a case by case basis, depending on which Focus Area advocacy is most aligned to and what the issue is. Advocacy for Priority Projects and Infrastructure Projects (Focus Area 4.10) an outcome of this Focus Area. 	<p>DMP Custodians Relationship Management Plan</p> <p>Annual Advocacy on key issues.</p> <p>VTIC Strategic Partnership</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	<p>Leadership Education Advocacy</p>	Ongoing
1.5	Industry Partner Program	Businesses operating in the destination see clear value in the Program and are engaged with relevant activations and projects.	<ul style="list-style-type: none"> Important Program to maintain connection and context with the industry, and to keep them engaged and inspired in the delivery of the Plan purpose. Evolve the prospectus to positive impact (ref. Principle 2) Support <i>Phillip Island/Millow Regenerative Tourism Alliance</i> continuation to develop/pilot new initiatives Annual calendar of networking events to foster opportunities for connection, partnership, learning, inspiration and innovation (Align to Focus Area 4.5).. Distribution channel for the Industry Sentiment Survey 	<p>Annual Industry Partner Program</p>	<p>DPI</p>	<p>Leadership Education Deliver</p>	Ongoing

PRINCIPLE ONE / ACTION PLAN, CONT.

#	Focus Area	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
1.6	Community Engagement	The community have a positive sentiment toward tourism, and understand it's value to the destination.	<ul style="list-style-type: none"> • Build understanding of the full value of tourism for the destination (Separate to the Community Voice, Focus Area 1.1) • Tailor messages for different community personas and optimise relevant touchpoints • Wth community leaders, including Resident/Ratepayer Action Groups and Environmental Conservation groups. • Authenticity, transparency, inspiration and storytelling will help cut through, and connect hearts and minds of community, and bring them along with achieving the plan's purpose. • Distribution channel for the Annual Community Pulse Survey 	Annual Community Communication Plan	DPI	Leadership Deliver	Ongoing
1.7	Emergency, Disaster & Climate Action Preparedness	Plans are developed and activated to appropriately respond to emergency, disaster and climate related events.	<ul style="list-style-type: none"> • Education/preparedness for industry • Role clarity for Stakeholders on their responsibilities • Learn from the increasing number of climate crisis events across the globe • Cohesion and collaboration across destination to ensure a consistent approach to emergency, crisis and climate response. • Topic area for Industry Capability Building (Focus Area 4.5) 	Review stakeholder emergency plans, and ensure alignment for future deployment.	BCSC	Partner	Ongoing

PRINCIPLE TWO

Caring for our Environment & Community

We enable visitors to have a positive impact on our people and place.

Our community shares a special connection with our environment and has a strong emphasis on preserving natural assets for future generations.

This responsibility to safeguard our unique destination is a top priority. However, we face significant challenges due to urbanisation and population growth which threaten our natural landscapes, wildlife and waterways, our environmental conservation efforts, our community cohesion, and our ability to fulfil our promises to visitors.

Simultaneously, there is a growing global demand for sustainable experiences, yet limited opportunities exist for visitors to actively engage in local impact programs or support businesses contributing positively to our destination.

By activating strategic tourism levers, we can enhance the incredible commitment and outcomes of the ongoing regenerative efforts of our community.

A critical activation will be to establish a stewardship governance model for this DMP, that advocates for an ingrained region-wide focus on positive impact outcomes.

Inspired by global initiatives, including [Hawaii's Malama Program](#) and Wanaka's [Love Wanaka Program](#), we will co-design a whole destination giving back initiative to support the activation of regeneration efforts on the ground.

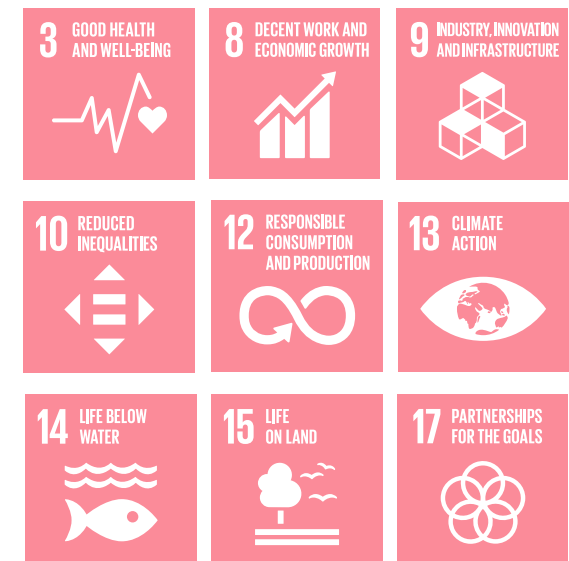
A visitor pledge will act as a central, and integral education mouthpiece for all stakeholders, to encourage positive visitor behaviours, in line with the aspirations of our community.

We will support our industry to develop positive-impact visitor experiences, which will better connect visitors with our story, inspire positive visitor behaviours through learning and education, and attract more high-value, values-aligned visitors.

It's also the aspiration of our community to enhance the understanding and acknowledgment of First People's culture and stories through our visitor experiences.

Equally though, the community respect the rights of self-determination, and any actions to consider will be co-created as relationships and a common purpose are established.

SDG ALIGNMENT



PRINCIPLE TWO / ACTION PLAN

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
2.1	Visitor and Community Contribution	Visitors have the opportunity to easily contribute to local conservation and biodiversity projects.	<ul style="list-style-type: none"> • A destination-wide program where visitors can contribute \$ or time to support local conservation and community projects. • Simplicity will be key. Must be easy for industry to be involved in, and visitors to contribute to financially or by participating in a hands on event (eg Island Bush Care events). • Robust governance is essential to build and maintain trust by both industry and visitors to ensure it's not seen as a green washing project, with all funds collected going to local community and environmental organisations. • <i>Love Phillip Island Summer 2023</i> pilot is in progress • Opportunity to align to <i>BCSC Biolinks Project, BCSC Environmental Development Fund and Penguin Foundation</i> • Look to collate and promote events where visitors can get involved with regular conservation events across the destination. • Inspiration: <ul style="list-style-type: none"> ◦ <u>Phillip Island Nature Parks</u> are already Australian leaders of visitor contribution \$. They are a philanthropic partner in the <u>Penguin Foundation</u> who's sole purpose is to support environmental initiatives on Phillip Island. Leverage and build on their learnings. ◦ <u>Love Wanaka</u> (Visitor Contribution Fund and Love Wanaka Events), <u>Love Queenstown</u>, <u>Bhutan Sustainable Development Fee</u>. 	<p>Visitor Contribution Fund</p> <p>Visitor Contribution Events Activation</p>	<p>BCSC</p> <p>DPI</p>	<p>Leadership Education Advocacy Deliver</p>	<p>2023/2024 then Ongoing</p>

PRINCIPLE TWO / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
2.2	Positive-Impact Destination Leaders	Destination stakeholders lead the industry with positive impact policies, initiatives and actions.	<ul style="list-style-type: none"> DPI, BCSC and Nature Parks have a continuous focus on their own positive impact plans and actions, which are aligned to the Plan's vision Current actions in progress include: <ul style="list-style-type: none"> Phillip Island/Millow Regenerative Tourism Alliance - Place-based, community and industry pilot programs, goals and initiatives (DPI). It's long term future is a priority. Eco Tourism Australia Destination Sustainability Accreditation (BCSC) Bass Coast Reconciliation Network (Nature Parks, BCSC, Western Port Water, Bass Coast Health) Climate Change Action Plan 2020 - 2030 (BCSC) Phillip Island Nature Parks 30-year Conservation Vision - Beyond the Horizon 2018 (Nature Parks) Regular sharing of relevant actions to Community and Industry to educate, inspire and align (via Focus Areas 1.4, 1.5), and infiltrate into their own businesses (Focus area 2.4). Activate collaborative projects at a local scale, eg. Waste free events or plastic free PI. Focus: Emissions reductions, waste, reconciliation actions, conservation & research partnership, visitor contribution projects (Focus Area 2.1) New projects and ideas that emerge from this focus area's actions are piloted and scaled for wider industry 	<p>Phillip Island/Millow Regenerative Tourism Alliance Initiatives & Ongoing Governance</p> <p>Eco Tourism Australia Destination Sustainability Accreditation</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	<p>Leadership</p> <p>Education</p> <p>Advocacy</p> <p>Deliver</p>	Ongoing
2.3	First Peoples Partnerships	Relationships built with First Peoples Communities, Businesses and Peak Bodies.	<ul style="list-style-type: none"> Bunurong Land Council Aboriginal Corporation (BLCAC) is the peak body of the destination. Understanding more First People's story of place is a strong aspiration by the community and industry, however needs to led and told by First Peoples. Traditional Place names in marketing, signage and interpretation is a strong aspiration by the community and industry. BCSC are in the process of developing their Reconciliation Action Plan Look for relationship building opportunities through the Bass Coast Reconciliation Network (Nature Parks). Support for First Peoples Led Businesses through procurement is a community aspiration Align to Experience Victoria 2033, Yuma Yirramboi Strategy and future First Peoples Tourism Plan. 	<p>Actions are to be co-created as relationships and a common purpose is established across all areas of the Plan.</p> <p>Social Procurement Policy</p>	<p>DPI</p> <p>BCSC</p>	<p>Partner</p>	Ongoing

PRINCIPLE TWO / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
2.4	Positive-Impact Visitor Experiences & Events	<p>Regenerative mindset embedded across all businesses and event organisers.</p> <p>Immersive visitor experiences, with positive impact on local environment & community.</p>	<ul style="list-style-type: none"> • Activation of new pilots/projects emerging from Positive Impact Destination Leaders initiatives (Focus Area 2.2). • Align to the activation of the Visitor Contribution (Focus Area 2.1) • New positive impact experiences are being developed, eg. Citizen science, waste collection, tree planting, learning tours of destination conservation, social, and cultural regeneration projects. • Build relationships with key major event organisers to explore opportunities for positive impact initiatives, collaborations and partnerships that align with the DMP purpose. • The protection of the fragile ecology of the Western Port from negative impacts of cruise ships is a priority. • Evolve the Industry Partner Program (Focus Area 1.6) to reward/incentivise operators to take positive action (and record # of businesses who are seeking or have achieved accreditation to support <i>Plan Success Framework</i>). • Create networking, sharing, learning opportunities between local people and business as they take actions for others to learn from via Industry Partner Program (Focus Area 1.6) and Industry Capability Building (Focus Area 4.5). • Inspiration: TICT Emissions Reduction Program, Tilos, Worlds First Waste Free Island, Malma, The Hawaiian Islands, The Eden Project 	<p>Sustainable and Regenerative Mentoring Program</p> <p>Businesses Sustainable Tourism Accreditation Advocacy</p> <p>Positive Impact Experience Development</p> <p>Major Event Positive Impact Advocacy</p> <p>Cruise Ship Advocacy Plan</p>	DPI	Education Leadership Mentoring Advocacy Partner	Ongoing
2.5	Positive Visitor and Community Behaviors	<p>Communication framework to articulate destination values to mitigate negative behaviours/support positive impact behaviours of both visitors and locals.</p>	<ul style="list-style-type: none"> • A collective communication framework that all plan custodians unite behind • Start small, and don't get caught up in 'building' new infrastructure, such as signage or stand alone digital channels. Get creative. • Simple, clear and easy to understand. All stakeholder support and communicate at relevant visitor touch points. • Consider how to bring residents on the journey, as hosts for VFR • Focus on behaviour change for residents, existing visitors and event attendees as identified as challenges by community. • Inspiration: Tiaki Promise, Kyoto Code of Behavior for Visitors 	The Phillip Island Promise	DPI BCSC	Education Leadership Deliver	2024/2025

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

- INDUSTRY WORKSHOP PARTICIPANT,
BUSINESS OWNER & RESIDENT



PRINCIPLE THREE

Sharing our Story with Impact

Telling our unique story of place, people and culture.

Our destination's DNA is built on a relentless commitment to conservation, regeneration, and climate activism, which coupled with our First Peoples's history, island geography and abundance of nature and wildlife experiences, underpins a unique and compelling story to share with the world.

We need to confidently know and share this story, and enable visitors to be part of building this story with us, to develop a competitive position for the destination to drive appeal from visitors across the globe.

Furthermore, using our storytelling activations as a vehicle to educate our audiences on respectful and responsible visitor behaviours will be a key focus.

Engaging all stakeholders and market segments in our story will ensure that every visitor, no matter their reason or origin, will understand their responsibilities, and be empowered to support us in achieving our purpose.

Pivoting our brand marketing activations to focus on positive-impact and good news stories is the first step to educating our visitor audiences. This, coupled with the optimisation of all in-region touchpoints with a consistent narrative will reassure visitors of our promise, and will be a critical step to achieving our purpose.

Enabling residents to become advocates for tourism will not only instill civic pride and better connect them with their community and environment but empower them to be responsible hosts for friends and relatives.

SDG ALIGNMENT



Our Good News Stories

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 - 50% solar on the roof, feeding into the battery (if done tomorrow, the Island would be energy positive).
- Blue carbon farming in the 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, and home to globally significant migratory birds.
- Waste – Bass Coast Shire Council has the highest waste diversion from landfill in Victoria
- Phillip 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.
- 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
- Berninnet - Cowes Cultural Centre sustainable build story - Passivhaus Standards
- Biodiversity Biolinks Program and land buyback programs
- Phillip Island Community Orchard, 10 plus years growing local products, demonstration classes and community and visitor education.

GOOD NEWS STORY IN ACTION

Phillip Island Nature Parks · Follow

History Lesson time! We know how special our Little Penguins are, but did you know, how much they've achieved in their history? Their home, Summerlands Peninsula was once a residential subdivision!

The first subdivision consisted of 12 large allotments, along with features such as a roundabout and cypress trees. Between 1927 and 1931 227 new blocks were created, and from 1929 to 1940 there was a nine-hole golf course on what is now the Penguin Parade car park.

In 1950s a further 437 blocks were created, and the final subdivisions were carried out in 1958 and 1961 on land closer to the Nobbies.

In 1985 the Victorian government decided that to protect the penguin rookery, further development of the subdivision would be prohibited and that all the properties would be progressively purchased by the state. The programme had a projected end date of 2000, with the land to be added to Phillip Island Nature Parks. The buyback process was actually finalised in the years 2008-09. In June 2010 the government announced that the buy-back programme had been completed and so too was the protection of the Little Penguin's home.

The power of these Little Penguins and their importance really shine through in this achievement. For more history on how Phillip Island Nature Parks has become what it is today, go to: <http://www.penguins.org.au/about/our-story/our-history/>



PRINCIPLE THREE / ACTION PLAN

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
3.1	The Phillip Island and San Remo Story	Deepen the understanding of the destination stories, with a focus on conservation and First People's stories of place.	<ul style="list-style-type: none"> The destination's strength "Authentic Regenerative Culture" are undertold in current destination marketing, yet is a demand driving strength of the destination. Understanding the conservation & positive impact initiatives in the destination starts with a storytelling audit to understand what are the current stories. Once the stories are understood, the development of storylines and storytelling assets will allow them to be more prominently shared across Brand Marketing (3.2) and Markets and Sector Partnerships (3.3). Inspiration: Wanaka Sustainability Stories Understanding more of the First People's stories of Phillip Island and San Remo is a strong aspiration by the community and industry, however this needs to led and told by First Peoples and will be activated though First People's Partnerships (Focus area 2.3) 	<p>Local Conservation + Positive Impact Stories Audit</p> <p>Storytelling Assets Optimised/Updated</p> <p>Understand the Story of Millowl</p>	DPI	Deliver	2024
3.2	Brand Marketing	Annual tactical plan of values and purpose-led demand driving activations via owned, earned and paid media.	<ul style="list-style-type: none"> Activate the Phillip Island brand story via regional campaigns and marketing programs with the support of the Phillip Island 101 assets. Support Visit Victoria to activate the Destination Victoria Brand Strategy framework sub-brand for Phillip Island & San Remo. Aligning with this framework is a priority. Reconcile DPI customer profiles with Visit Victoria's Visitor personas to ensure alignment and consistency, and develop additional messaging to support as required. Optimise owned, always-on channels with conservation and positive-impact stories (Focus Area 3.1) and to activate The Phillip Island Promise (Focus Area 2.5). Off-peak focus: Autumn, Winter, Spring New event category on destination website curating in community conservation events (via Focus Area 2.1 Visitor and Community Contribution). Visitor Profile Focus: Melbourne, Victoria, VFR, Repeat Visitor (align with Visit Victoria's visitor profiles) Partnerships developed with values-aligned media, organisations and individuals for earned and paid opportunities. Paid campaigns to be scoped subject to annual budget availability Consider tactical measurement metrics that align with DMP values and aspirations and target audience (High Value, Values Aligned Visitors) 	<p>Destination Marketing Program inc Phillip Island Regional Brand Campaigns</p> <p>Visit Victoria "Island Sanctuary" Brand Activation Alignment</p> <p>Industry Partnership Program Evolution</p>	DPI	Deliver	Ongoing

PRINCIPLE THREE / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
3.3	Markets & Sector Partnerships	Annual tactical plan of activities to attract high value, values-aligned markets and sectors.	<ul style="list-style-type: none"> All activities the destination undertakes with partners to drive demand from International Markets, Business Events, Drive Trails, Cruise, Niche Interest Groups and Sporting Events. Visit Victoria and Tourism Australia are key brand, marketing and market development partners, and building a close relationship with key staff and departments is an ongoing priority. We will actively work with them to align brand positioning to reflect our destination purpose, aspiration and values. Participate in aligned Visit Victoria (Domestic & International) and Tourism Australia (International) trade opportunities (Intrastate, Interstate, Western and eastern Markets). Business Events is a key market for the destination. Annual activations will be collaborative, and depend on resourcing and funding. Business Events Victoria is a key partner strategic partnership of DPI. The Phillip Island Business Events Guide is a key resource to keep updated. Drive Trail Cooperative Marketing Partnerships: Go Beyond Melbourne, Sydney to Melbourne Touring Route, Drive Victoria - Regional Coop Marketing Campaign with Great Ocean Road, Geelong Bellarine & Mornington Peninsula. Wellness: Great Victorian Bathing Trail is a future opportunity to explore Cruise: Looking to attract values aligned cruise ships, and opportunities to grow positive impact of cruise visitors. Niche interest groups aligned to destination strengths, eg. Nature & Wellness Motor Sport: Leverage the global recognition of motorsport events on Phillip Island, looking at opportunities to leverage the global media coverage. Look for new opportunities to partner with values-aligned brands and organisations to reach the values aligned, high value visitors. Supporting Isle of Wight to develop strong distribution to international markets will be a key opportunity. 	<p>Annual Brand Partnership Plan</p> <p>Annual Domestic & International Trade Activities Plan</p>	<p>DPI</p> <p>BCSC</p> <p>Nature Parks</p>	<p>Influence Advocate</p> <p>Educate Partner</p> <p>Mentor</p>	Ongoing

PRINCIPLE THREE / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
3.4	Visitor Collateral	Visitor collateral and seasonal event information inspires visitor contribution, positive visitor behaviours, longer stays, greater local spend and dispersal.	<ul style="list-style-type: none"> Content evolves in line with the development of Visitor Contribution projects (Focus Area 2.1) and development of The Phillip Island Promise (Focus Area 2.5). Events; Include community conservation events where visitors can get involved with environmental stewardship projects. Use QR technology as a way to keep printed visitor collateral up to date, directing visitors to the destination website for most up to date information, eg. What's On Calendar. Minimise or inset environmental impacts of printing 	<p>Annual Visitor Guide</p> <p>Seasonal What's On Guides</p> <p>Visitor Map</p>	DPI BCSC	Deliver Advocate	Ongoing
3.5	Visitor Welcome Programme	All visitors to the region have the right visitor information, at the right time, in the right place, in the most appropriate format and is accessible to all (language and format).	<ul style="list-style-type: none"> Distribution channels for Visitor Collateral (numerous touchpoints for consideration) and also sharing of destination stories to visitors. Learn from pilot projects and scale up for peak seasons Audiences include businesses, volunteers, residents, tour operators, event organisers, cruise ships, real estate/short stay accommodation letting agents. Visitor Centre focus on a consider a concierge approach of where an how to take visitor servicing activities to visitor who are not visiting the visitor centres, including to Short Stay Accommodation properties. Local residents, including volunteers, community groups and local residents are important visitor touchpoints, so continued evolution of the My Phillip Island Ambassador program to share the destination's stories is an important project. Congestion across the San Remo Bridge due to simultaneous accommodation check out times was noted as an issue that could be addressed as part of Visitor Welcome Program and or Island Pledge to encourage a slower departure from the Island after check out. Consider where and how the new Visitor Exit Survey can be intergrated into relevant touch points. 	<p>Annual Visitor Collateral Distribution Plan</p> <p>My Phillip Island Ambassador Program</p> <p>Accommodation In-Room Guest Information</p> <p>Digital Storytelling Guides</p> <p>Multi Lingual Visitor Collateral & Resources</p> <p>Tour Operator Accreditation (Nature Parks)</p>	DPI BCSC Nature Parks	Education Leadership Advocacy Partner Deliver	Existing Initiatives Ongoing 2024/2025

PRINCIPLE FOUR

Enhancing our Visitor Experiences

We deliver quality experiences that connect people with place, and improve livability for our locals.

To successfully market a destination, there must be a strong alignment between the destination's visitor promise and its visitor experiences.

We will continue our focus on growing the quality and quantity of values-led experiences that reflect our competitive experience strengths (nature, marine, wildlife, events) and our supporting experiences to widen the appeal of our offering to attract new markets (food and drink, wellness and First Peoples led experiences).

Through capability-building initiatives, we will guide our industry to explore ways to create positive impact experiences to enable visitors to support our purpose; develop inclusive experiences so we are open for all; and create year-round offerings to ease the burden over summer.

Advocating for an increase in sustainable and eco-friendly accommodation supply will catalyze demand from our high-value and values-aligned visitors.

Continuing to advocate to host world-class events, along with supporting a yearly program of grassroots visitor-focused events, will strengthen our marketable competitive position, and support year-round visitation.

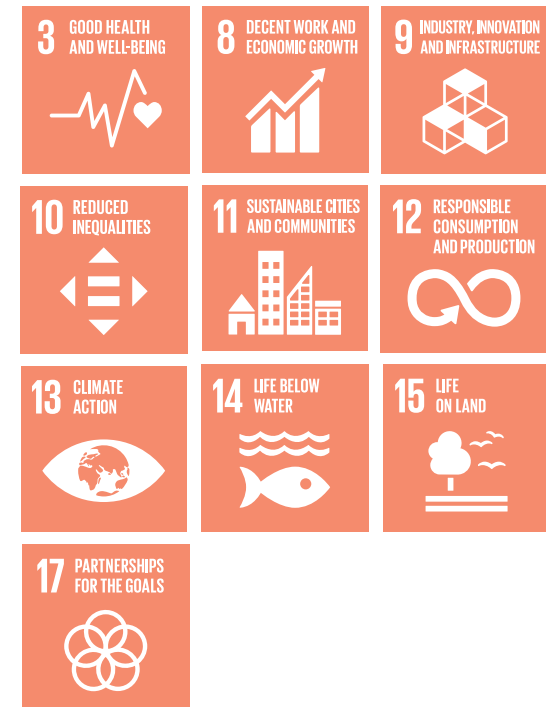
Advocating for infrastructure, placemaking and principles-aligned projects will ensure we can move quickly when opportunities present, and further support our ability to balance the needs of visitors and the community.

Workforce challenges, the scarcity of affordable, short-term housing during peak season, and accessibility to and around the destination are all impacting the visitor experience.

Further, the flow on effect 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, which is proving difficult and exhausting to many. Therefore, addressing workforce issues, and capacity building is a recommended focus area in this plan.

Continuing to work in close partnership with local and state governments will help to connect the dots between policy and tourism is also a major opportunity.

SDG ALIGNMENT





EXPERIENCE VICTORIA 2033 ALIGNMENT

Experience Victoria 2033 is the State Government’s strategic plan for tourism, and aims to shape the future of all of Victoria’s visitor economy over the next 10 years by strengthening the State’s tourism offerings.

Phillip Island & San Remo already have an incredibly close alignment with the Nature and Wellness pillars, with opportunity for continued development across Arts & Culture, First Peoples and Food & Drink.

	NATURE	WELLNESS	ARTS & CULTURE	FIRST PEOPLES	FOOD & DRINK
Experience Development Considerations	<p>Advocate for coastal, aquatic, small-group in-destination based tours (cycle/walking tours/sunrise breakfasts) and hire (including ev hire).</p> <p>Major Projects</p> <ul style="list-style-type: none"> • Summerland Peninsula Master Plan • Yallock Bullock Trail <p>The Island Whale Festival - activation of destination conservation values and aligned to visitor contribution projects (see Focus Area 4.4).</p>	<p>Phillip Island Hot Springs (Major Project) will be a game changer and new experience for the destination. Continue support as required.</p> <p>Working with local providers and experiences to develop the Phillip Island wellness offering.</p> <p>Wellness Event Concept - activated (Focus Area 4.4)</p>	<p>Advocate for enhancing, upgrading or developing values-aligned historic and cultural institutions to ensure visitors are engaged in contemporary and high-quality exhibitions/ experiences</p> <p>Arts and cultural events, including night-time economy, Berninnet Cultural Centre, Cowes (Major Project) activation and Festival of Stories</p> <p>Bass Coast Dinosaur Master Plan activation to share the region's prehistoric heritage.</p> <p>Advocacy for Vietnam Veterans Museum expansion.</p>	<p>First People’s led cultural experiences, including tours, attractions and events, which could also include partnerships with existing events and experiences.</p> <p>Look to Parks VIC for case studies and best practices in First Peoples led consultation and project initiation.</p>	<p>Support the development and promotion of food and drink experiences, including events, that align with the destination strengths and values, including San Remo Tidal Seafood Festival.</p> <p>Local provenance (grown/made), immersive and bookable</p> <p>Seafood and local produce in hospitality and accommodation venues and events locally</p>
Strategic / Policy Alignment	<p>Victoria’s Nature-Based Tourism Strategy</p> <p>Gippsland Tracks and Trails Strategy</p>	<p>The Great Victorian Bathing Trail</p>	<p>Bass Coasts Arts and Culture Strategy 2019 - 2029</p>	<p>Yuma Yirramboi Strategy</p> <p>Future State Government First Peoples Tourism Plan (DJSIR).</p>	<p>Towards 2030 Gippsland Food, Drink and Agritourism Strategy</p>

PRINCIPLE FOUR / ACTION PLAN

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
4.1	Experience Development	Experiences that are driving demand for the destination in their own right year-round, supporting longer visitor stay and contributing to care and connection with our place.	<ul style="list-style-type: none"> Identify opportunities to grow new or existing experiences that support the destination's strengths and align to <i>Experience Victoria 2033</i> priority experience themes, and leverage aligned sector experience development strategies at regional, state and national level(as per detail on page 46). This also includes advocating for packaging and partnerships between businesses with the destination. Connect businesses with relevant funding programs and training to support businesses in startup, experience development, distribution and packaging (Focus Area 4.5). Where relevant, if aligned to destination values and environmental goals, add new experiences to the Major Project Funding Advocacy (Focus Area 4.10) and support through the Local Planning criteria (Focus Area 4.8). Look for positive impact experience opportunities across all experience pillars (Focus Area 2.1 Visitor and Community Contribution and Focus Area 2.4 Positive Impact Experiences & Events). Accessible and inclusive experiences are a high priority. Nature Parks are the anchor destination experience across most pillars, so ongoing support and advocacy for their current and future experience development priorities Investment attraction for values aligned developers is a priority. 	<p>Advocate for Operators to apply for relevant Grant Funding Programs</p> <p>New Product Incubator Project</p> <p>Relevant Industry Capability Building Initiatives (Focus Area 4.5)</p> <p>Major Project Funding Advocacy & Mentoring (Focus Area 4.10)</p> <p>Event Optimisation and Activation (Focus Area 4.3, 4.4)</p> <p>Local Planning Support (Focus Area 4.8).</p> <p>Accessible and Inclusive Experience Audit</p> <p>Investment Attraction Portal</p>	DPI BCSC	Education Leadership Mentoring Advocacy	Ongoing
4.2	Quality Accommodation	Accommodation that is driving demand for the destination in it's own right and/or supporting longer visitor stays.	<ul style="list-style-type: none"> Proactively and strategically advocate and support for new values-aligned, environmentally-sensitive, accommodation, such as Experiential, Glamping, Tiny Homes, Nature Based State government aspirations are to attract a recognised industry accommodation brand to the destination Advocate for retrofitting of existing accommodation to meet the Plan's community, cultural and environment goals. Inspiration: Accommodation Retrofit Movement Where relevant, if aligned to community values and environmental goals, add to Major Project Funding Advocacy List (Focus Area 4.10) and support through Planning Frameworks (Focus Area 4.8). 	<p>All actions as per Focus Area 4.1</p> <p>Investment Attraction Initiatives of Bass Coast Shire Economic Development Framework</p>	DPI BCSC	Education Leadership Mentoring Advocacy	Ongoing

PRINCIPLE FOUR / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
4.3	Major, Participatory Sporting & Businesses Events	Major, participatory sporting and business events are driving demand for the destination year round.	<ul style="list-style-type: none"> Attract new events that align to the destination experience strengths, destination values, identified visitor market and niche interest groups. Leverage of existing and future major event venues - eg Berninnet - Cowes Cultural Centre, Phillip Island Circuit, Isle of Wight and Nature Parks venues and natural event assets (eg surfing beaches and trails) Phillip Island Circuit's year round events are significant drivers of business to local hospitality and accommodation providers. Partnering with Events Gippsland is one activation strategy of BCSC, however it is key that the Phillip Island Brand is used when bidding/marketing events within the destination. Partnering with Business Events Victoria via DPI is a key strategy to attract Business Events, whilst Nature Parks activities are also driving incentive visitors to the destination. The ongoing delivery of the world class MotoGP and the Superbike World Championship events beyond the contracted date of 2026 is an important priority for the region. These are key events for the destination, delivering global earned media for the destination. The Visitor Welcome Program is an important initiative to connect with event participants / attendees (Focus Area 3.5), 	<p>Annual Major Events Attraction Initiatives</p> <p>Major Destination Event Contract Renewals</p>	<p>BCSC</p> <p>DPI</p> <p>Nature Parkes</p>	Partner Advocacy	Ongoing
4.4	Local & Community Events	Local and community events are bringing the destination experience strengths to life, connecting visitors to destination values, people, place and stories, and driving demand and longer stays.	<ul style="list-style-type: none"> Delivery and support of key regional events: The Island Whale Festival, San Remo Tidal Seafood Festival and Festival of Stories Activation of the new Wellness Festival, that is driven by industry, when resourcing is available Maximise these event's outcomes ensuring they connect with destination businesses and community. Move quickly towards achieving waste free and carbon zero (Focus Area 2.4), which can be aligned with BCSC's Circular waste initiatives. Look for opportunities for First Peoples partnerships and procurement (Focus Area 2.3) Event Committees look for solutions to be sustainably resourced and governed, to help address volunteer fatigue, ensuring long term event sustainability and quality event delivery. Event delivery outside of peak season essential Council financially supports community and major events. <i>Strategy Alignment: Bass Coast Shire Low Season Events Report 2018 and BCSC Economic Development Framework</i> 	<p>Off Peak Event Activation Initiatives</p> <p>Island Whale Festival</p> <p>Waste & Carbon Free Events Advocacy (Focus Area 2.4)</p> <p>Wellness Event Concept Commercially Activated</p>	<p>BCSC</p> <p>DPI</p>	Partner Advocacy Deliver	Ongoing

PRINCIPLE FOUR / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
4.5	Tourism Experiences and Events Resilience & Capability Building	Resilient, financially sustainable, entrepreneurial, innovative, inclusive and values-led tourism businesses operating in the destination.	<ul style="list-style-type: none"> Annual program of learning, across events, workshops, training and mentoring programs Focus on new or existing businesses and events who deliver on the destination experience strengths, and where key quality experience gaps exist (eg accessibility). Capability Building Topics for annual consideration: 101 tourism marketing, distribution, business strategy, business resilience, emergency preparedness, workforce recruitment/retention, sustainable, cultural awareness, accessible/inclusive experiences, positive-impact experiences, storytelling (specifically destination stories as per Focus Area 3.1) and experience design (aligned with gaps and opportunities identified in Focus Area 4.1). Packaging and partnership encouraged between businesses and events, including Phillip Island Hot Springs and Isle of Wight as they come online. Proactive forward planning and communication of event calendar to minimise industry fatigue and maximise engagement and participation. Leverage state, federal, sector and specialist areas training opportunities. Dedicated training for Event Organisers around strategic planning, management, funding and governance. Support fatigue and succession. 	Annual Capability Building Program	DPI	Leadership Advocacy Partner	Ongoing
4.6	Workforce Development	Ensure workforce availability and improve workforce retention to deliver on the visitor promise.	<ul style="list-style-type: none"> The <i>Phillip Island and San Remo Workforce Plan</i> is the lead strategic plan for the destination. Position employment and volunteer opportunities as 'for purpose' to inspire values aligned workers connecting them with the destination's purpose and aspirations. Housing available is key challenge, look for solutions to short stay seasonal and/on-site staff accommodation availability Look for solutions to connect tourism businesses with employees/volunteers Work with schools and local higher education providers to promote tourism as a values aligned career pathway. Nature Parks has projects in progress in this space. Look to support actions that align with the Young Voice in Tourism Report Build capability of businesses to attract and recruit values aligned staff Look for opportunities to support meaningful career pathways for First Peoples, align to <i>Yuma Yirramboi Victorian Aboriginal Employment and Economic Strategy Aligned Initiatives</i>. 	<p>Phillip Island and San Remo Workforce Plan Activation</p> <p>Values Led Island Employment Campaign</p>	DPI BCSC Nature Parks	Leadership Advocacy Partner	2024/2025

PRINCIPLE FOUR / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
4.7	Town and Community Place-Based Destination Planning	Local communities feel heard, they are seeing action on negative visitor impacts, and seeing their local livability improve from new infrastructure, capital works and placemaking initiatives.	<ul style="list-style-type: none"> The aim is to manage negative visitor impacts, protect local town and community environment damage from visitors and have proactive visitor impact management at peak times inc. parking, bins, toilets, active transport routes, public transport, signage, event infrastructure, tracks, trails, improved retail mix, digital connectivity, water infrastructure, electricity infrastructure, climate mitigation infrastructure, affordable house for staff. Community engaged on visitor economy impacts. In progress: Cowes Activity Plan, Smiths Beach Town Plan, San Remo Masterplan Review and integrate recommendations from the VES2035 (Technical Appendix 12) that are yet to be addressed The DMP's Community Sentiment measure (Focus Area 1.2) is a good opportunity to have an ongoing question to identify local issues for proactive planning and mitigation into Council placemaking, infrastructure and capital works program, and projects requiring additional resourcing add to Major Projects Funding Advocacy List (Focus Area 4.10) 	<p>Town & Community Place Based Plans</p> <p>Community Sentiment - Local Place Based Feedback Mechanism</p> <p>Major Projects Funding Advocacy</p>	BCSC	Deliver	Ongoing
4.8	Planning Frameworks	Values aligned visitor experiences and accommodation making it through to planning approval.	<ul style="list-style-type: none"> Focused support for values aligned experiences and accommodation to successfully navigate local and state planning requirements. Where the current planning scheme is impacting the ability to achieve this Plan's purpose, stakeholders to advocate for future updates. BCSC's update to the Rural Land Strategy is a priority to help address gaps current planning frameworks. <i>Key Planning Framework: Distinctive Areas and Landscape Draft Statement of Planning Policy, Bass Coast Planning Scheme and Draft Landscape Planning Controls.</i> 	Rural Land Strategy Planning Frameworks Updates	BCSC	Deliver	2024/2025

PRINCIPLE FOUR / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
4.9	Short Stay Accommodation Contribution	Short Stay accommodation owners are contributing to care and maintenance of the precincts in which their properties are located.	<ul style="list-style-type: none"> • \$ Contribution by all short-stay accommodation owners across Phillip Island and San Remo. • Funds contributing to community placed based infrastructure • New channel to reach and communicate accommodation owners, for activation of Visitor Collateral (Focus Area 3.4) and Visitor Welcome Program (Focus Area 3.5) and Visitor Exit Survey (Focus Area 1.2) • Will also provide an avenue to advocate for compliance for short-stay accommodation providers where required (eg pool fencing safety as an example) • Will provide an avenue to measure impact on housing availability from new Victorian Short Stay accommodation tax (Focus Area 4.6) 	Bass Coast Shire Short Stay Accommodation Local Law	BCSC	Deliver	Ongoing
4.10	Major Project Funding Advocacy	Annual agreed upon priority list of projects seeking government funding that align to community values and the Plan's purpose and aspirations.	<ul style="list-style-type: none"> • Maintain the up to date list of prioritised Major Projects and Infrastructure (ref. page 58) that support the achievement of the Plan's purpose. • Stakeholder to meet and reconfirm list annually. • Advocacy channels confirmed and activated as part of Focus area 1.4, Destination Advocacy 	Major Projects and Infrastructure List	DPI	Advocacy	Ongoing

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

- COMMUNITY MEMBER, COMMUNITY SURVEY, JULY 2023



PRINCIPLE FIVE

Improving Visitor Movements

Develop more climate friendly transport options and reduce the reliance on cars.

Managing the noise, congestion, and climate impacts of vehicle usage within the destination, especially throughout peak visitation periods, has been a major concern for the community for some time, and remains a priority for mitigation.

Given the limited public transport options to and from Melbourne, there is work to do better align existing services and advocate for new services.

With the opening of the Isle of Wight, there is a focus on making it easy for visitors to get to Cowes via the Western Port Ferry and connecting Melbourne trains.

Activating the Island's coastal waters for both transport and experience activities is an aspiration by industry and the community.

Continuing to expand the destination electric vehicle charging infrastructure will help the destination be ready for the EV transition.

There are many specific local area transport issues caused by visitors to be captured and addressed through proactive Integrated Transport Planning.

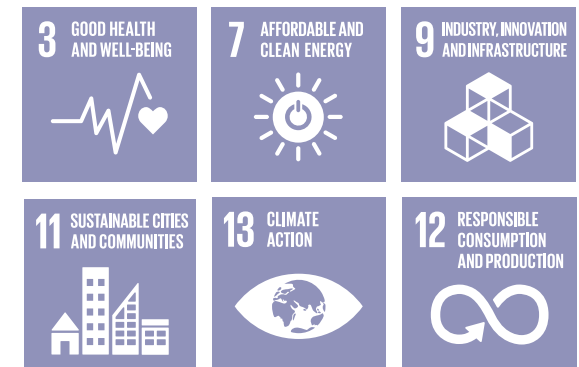
Exploring ways to activate a Short Visit Vehicle contribution to generate funds to reinvest back into active transport alternatives and encourage longer stays, is a key consideration of the plan.

Piloting on-demand transport options to and around the island, advocating for an increased supply of active transport hire products and progress of the development of tracks and trails throughout the destination will help make it easier for visitors who do arrive by car to leave the car-parked once they are in the destination.

Further, using successful activations such as the MotoGP Shuttle Service as mainstays for future events and throughout peak visitation times will continue to support the community's aspirations of less cars at peak times.

Accessible transport options for all visitors, is a key priority across all Focus Areas.

SDG ALIGNMENT



PRINCIPLE FIVE / ACTION PLAN

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
5.1	Short Visit Vehicle Contribution	Financial contribution by all non-resident, day trip vehicles onto Phillip Island.	<ul style="list-style-type: none"> An opportunity for the destination to take bold action Aim is to address strong community sentiment around too many cars in the destination, particularly at peak times, while also supporting emissions reductions and incentivising overnight stays. Creative ideas for raising sustainable revenue should not be off the table The community has a strong desire for funds generated to be quarantined and re-invested into community initiatives, active transport or conservation initiatives. Look to technology as an enabler, such as number plate recognition technology. Peak-season, location specific parking charges for non-residents is another another solution identified by community. Change management principles will be key to build trust around the value and reason for the project to ensure wider buy in by all stakeholders. Inspiration: UK Clean Air Zones, Venice Day Trip Visitor Fee 	Short Visit Vehicle Contribution Scoping Project	BCSC DPI	Leadership Partner Advocacy	2024/2025
5.2	Electric Vehicle Network	Transition to support electric vehicle usage for visitors and visitor experiences.	<ul style="list-style-type: none"> An opportunity for all stakeholders to have a conversation on how the destination is going to support the transition to electric vehicle future. Advocate for destination accommodation, key attractions and key visitor precincts to invest in electric vehicle charging infrastructure. BSCS to explore their role as part of Integrated Transport Planning Look for federal and state aligned grant opportunities Support and align with Totally Renewable Phillip Island actions. <i>Strategy Alignment: Bass Coast Shire Climate Action Plan 2020 - 2030</i> 	EV Industry Advocacy	BCSC DPI Nature Parks	Leadership Advocacy	2024/2025

PRINCIPLE FIVE / ACTION PLAN, CONT.

#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
5.3	Active & Public Transport	Visitors are able to get to and around the destination without a car or paid tour.	<ul style="list-style-type: none"> Advocating for funding for the On Demand Transport Pilot (Major Project) Continued progress of the Tracks and Trails Strategy Priority Trails (Major Project) to grow active transport options for walking and cycling visitors and tour operators. Advocate for schedule improvements for Melbourne <> Frankston<> Stony Point<> Western Port Ferry in line with Isle of Wight opening. Advocate for Isle of Wight Green Transport Plan activation. Encourage other businesses to develop their own plans and messaging to visitors. Advocate for active transport, destination based hire and tour options, that activate the destination's Nature experience strengths (Focus Area 4.1) Look to water based transfers between towns, such as peak times or major events. Advocacy for fit for purpose marine infrastructure that fits Park's Vic are a key stakeholder of marine public transport infrastructure, and key stakeholder. The Car Ferry is still a consideration into Cowes if external conditions aligned, as it would support increase capacity of passenger traffic to the destination. However it's business case is not a current priority for destination stakeholders. 	<p>On Demand Responsive Transport Pilot Delivery</p> <p>Tracks and Trails Priority Trails Delivery</p> <p>Public Transport Alignment Advocacy</p> <p>Water Based Transfers Feasibility and Scoping</p>	BCSC DPI	Advocacy Partner	Ongoing
5.4	Integrated Transport Planning	Local area parking and transport issues unified. Solutions actioned.	<ul style="list-style-type: none"> Council led strategy to capture all transport issues across the Shire Community and industry input to capture all local area transport issues not already addressed in this Plan Accessibility is an important consideration Marine transport an important consideration (Focus area 5.5) Where relevant add to Major Projects Funding Advocacy List (Focus Area 4.10) and support through Planning Frameworks (Focus Area 4.8) Any transport issues identified through Town and Community Place Based Destination Planning (Focus Area 4.7) captured, prioritise, budgeted and actioned Important avenue for community and industry to shared the local place based transport challenges 	Intergrated Transport Plan	BCSC	Deliver	2023/2024

PRINCIPLE FIVE / ACTION PLAN

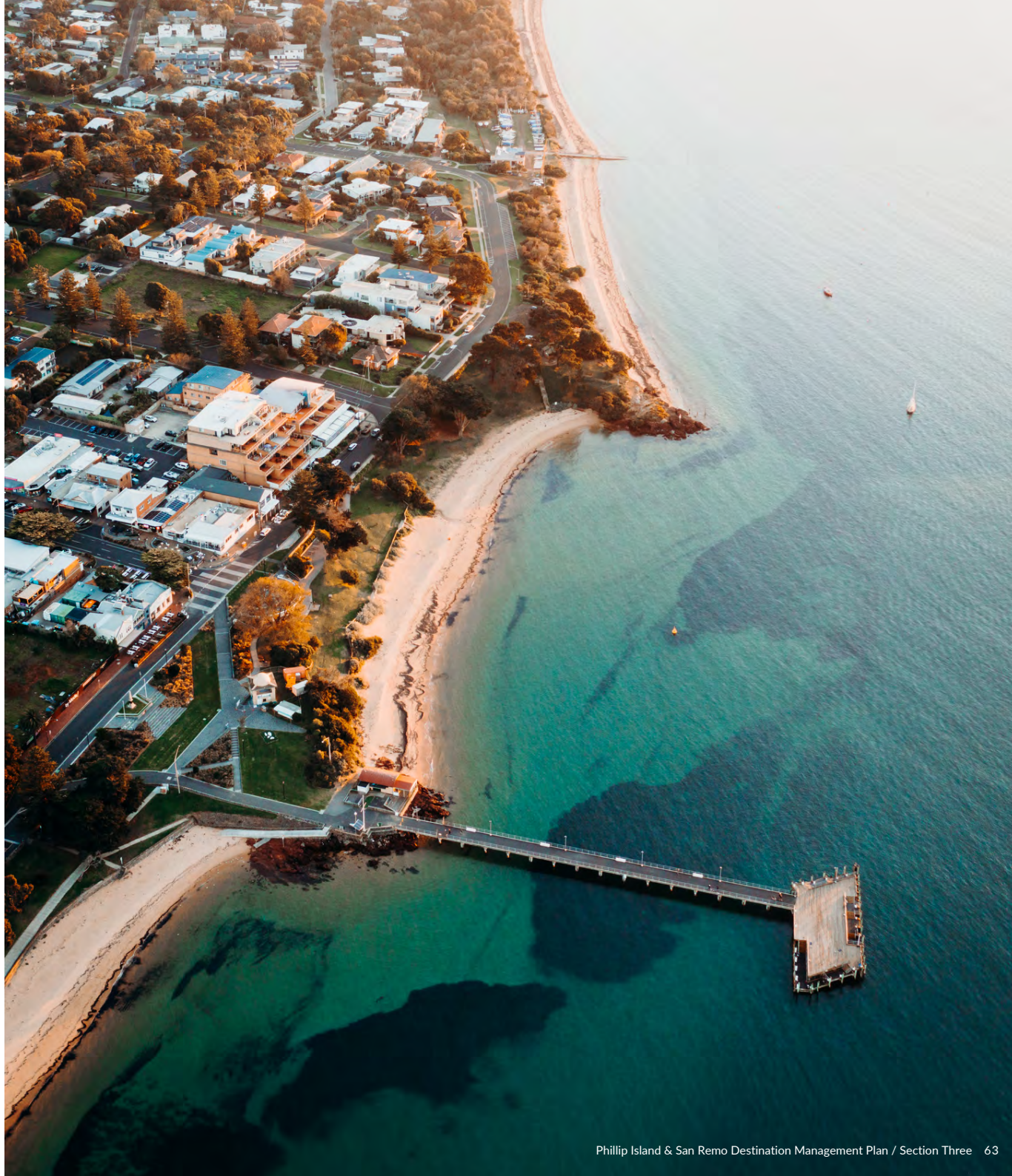
#	Focus Areas	Key Outcomes	Considerations	Possible Activations & Projects	Key Stakeholders	Role(s)	Timeframe
5.5	Marine Infrastructure	Marine infrastructure is fit for purpose, supporting the delivery of quality visitor experiences from the commercial sector and supporting activation of public transport.	<ul style="list-style-type: none"> • Parks Victoria re in progress with the Rhyll Local Port Area Plan (LPAP) (Major Project), tourism industry engagement into the project is key. • There is an aspiration by community to look to Cowes Jetty as a future arrival point. • Cowes Jetty (Major Project) visitor accessibility and visitor amenities are still a challenge, with only some minor maintenance completed recently. • Marine-based tourism businesses have specific place based needs and need consultation to refine their needs, to the be advocated for in new and existing marine infrastructure projects. • Marine-based public transport and water taxis are a community aspiration (Focus Area 5.3), including but not limited to between San Remo, Cowes & Rhyll • The Integrated Transport Planning (Focus Area 5.4) is a key project to confirm future priorities around marine infrastructure for community and industry. 	<p>Marine Tourism Infrastructure Scoping</p> <p>Cowes Jetty Upgrade Scoping</p> <p>Rhyll Local Port Area Plan Advocacy</p>	<p>DPI</p> <p>BCS</p> <p>Nature Parks</p>	<p>Advocacy Partner</p>	2024/2025

Priority Projects & Major Infrastructure

The achievement of our Priority Projects and Infrastructure will enable us to achieve our vision and targets, that help build a prosperous and resilient visitor economy.

The projects outlined below have already been earmarked throughout the Guiding Principles and Focus Areas.

This section explores the projects in greater detail, and outlines the current state of play in terms of progress for each project. This list will be updated Annually as per Focus area 4.10.



PRIORITY PROJECTS & INFRASTRUCTURE

Focus Area Alignment	Project Name	Lead	About	Details	Status	Role
4.1 Experience Development - Nature	Summerland Peninsula Master Plan	Phillip Island Nature Parks	<p>This project will see the completion of the Summerland Peninsula Master Plan 2012.</p> <p>Part 1: \$24.153m Works to the ageing infrastructure at the Penguin Parade to improve the visitor experience and accessibility to ensure it remains the leading paid ecotourism attraction in Victoria.</p> <p>Part 2: Summerland Peninsula Trails Master Plan (\$18.270 million). The creation of 18 kilometres of world-class, accessible trails including bridges, lookouts and road crossings, linking the iconic Penguin Parade to the Nobbies through some of the most spectacular views and landscapes in Victoria.</p>	<p>Master Plan 2012</p> <p>Summerland Peninsula Trails Master Plan</p>	Seeking Funding	Partner
	Yallock-Bulluk Walking & Cycling Trail	Parks Victoria	32km Coastal Walk through the Yallock-Bulluk Marine and Coastal Park. The Park will increase opportunities for people to enjoy the spectacular area through improved access, upgrades, new facilities and better links between coastal towns.	Parks Victoria Update 2021 and Park Infrastructure and Access Plan Update	<p>Design development completed.</p> <p>Working on Final assessments and approvals.</p>	Advocate
4.1 Experience Development - Wellness	Phillip Island Hot Springs	Private investment	Multi-stage development comprising ocean front Thalassotherapy (saltwater bathing), mineral and thermal zones complemented by a range of services including dining, wellbeing (yoga and meditation facilities) connected to walking trails and therapy gardens.	Phillip Island Hot Springs Website	Hot Springs planned opening late 2024.	Avocate

PRIORITY PROJECTS & INFRASTRUCTURE, CONT.

Focus Area Alignment	Project Name	Lead	About	Details	Status	Role
4.1 Experience Development – Arts Culture & History	National Vietnam Veterans Museum	National Vietnam Veterans Museum Board	Current museum proposed to move to new \$50m development on 100-acre site opposite current museum.	Project Update May 2023	Application approved by BCSC. Rejected by VCAT due to site planning concerns.	Advocate
	Bass Coast Dinosaurs Trail Masterplan	Bass Coast Shire Council	The Bass Coast Dinosaurs Trail will share the regions polar dinosaur story across six immersive experience sites at Inverloch, The Caves, Eagles Nest, Wonthaggi, Kilcunda and San Remo.	Project Update Report Bass Coast Dinosaurs Website	BCSC Seeking funding	Deliver
4.1 Experience Development – Food & Drink	Rhyll Brewery and Distillery	Private Investment	Microbrewery and distillery which will transform the Rhyll foreshore and boost tourism in the region. It will feature a 90-seat bar and restaurant, a brewery theatre and waterfront views.	Rhyll Brewery and Distillery Facebook Page	Approved	Advocate
4.2 Quality Accommodation	Isle of Wight	Private Investment	160-room hotel, ground floor food and beverage facilities, signature restaurant, 450 capacity event space, wellness centre and pool deck. 2025 Opening, estimated \$50-\$80m economic value.	Moda Website	Approved by BCSC. Late 2025 public date of opening TBC. Seeking funding support for staff accommodation with support of DPI/BCSC.	Advocate
	85 Thompson Ave, Cowes	Private Investment	New four-storey hotel, with five residential apartments and a mix of retail spaces in Cowes.		Council and VCAT approved in November 2022.	Advocate
5.3 Active Public Transport	On Demand Transport Pilot	Bass Coast Shire Council	A demand responsive transport system to be utilised by visitors and local community. Seeking Funding: \$6.25 million over three years to implement an on-demand transport pilot in Phillip Island and San Remo.	On Demand Transport Pilot October 2022	Seeking Funding. Awaiting State Government Strategy Alignment.	Deliver

PRIORITY PROJECTS & INFRASTRUCTURE, CONT.

Focus Area Alignment	Project Name	Lead	About	Details	Status	Role
5.3 Active Public Transport & 5.5 Marine Infrastructure	Cowes Jetty	To be confirmed with key Stakeholders	Cowes Jetty accessibility and visitor amenities are still a challenge and a priority upgrade for all stakeholders, particularly with focus on capacity for ferry passenger traffic and for accessibility for marine tourism businesses. Rhyll is the current arrival jetty for Cruise Ship tenders, however there is aspiration by community to look to Cowes Jetty as a future arrival point. Minor maintenance was completed recently to improve accessibility and reinstated emergency vehicle access on the jetty, which was originally built in 1870, however further upgrades are required.	New major project priority for destination that requires scoping.	Advocacy and project scoping required.	Partner
	Rhyll Jetty	Parks Victoria	The Rhyll Local Port Area Plan (LPAP) is in progress and is part of the Department of Transport and Planning's vision for a sustainable and economically viable cruise shipping destination plan for Rhyll by renewing and adapting local port infrastructure.	Rhyll LPAP Status Update	Stakeholder Engagement and consultation.	Partner
5.3 Active Public Transport & 4.1 Experience Development - Nature (Infrastructure)	Tracks and Trails Network	Bass Coast Shire Council	Continued progress of the Tracks and Trails Strategy Priority Trails in Phillip Island and San Remo to grow active transport options for walking and cycling visitors and tour operators, and connect with trail networks in the destination. <ul style="list-style-type: none"> Cowes to Rhyll Pathway Trail provides connection from the top of McIlwraith Road in Rhyll into the Rhyll township. Cowes to Ventnor Foreshore Trail - Continue existing trail on The Esplanade, along the foreshore to Grossard Point Rd. Trail passes through Vegetation Protection Overlay. 	Project Update Report	Cowes to Rhyll – Stage 1 Compete Cowes – Ventnor Feasibility study required to ascertain environmental impact and cost Funding required, advocating via State Government Advocacy List	Deliver
4.3 Major and Sporting Events & 4.7 Town and Community Place- Based Destination Planning	Berninnet - Cowes Cultural Precinct	Bass Coast Shire Council and Regional Development Victoria.	A new purpose-built public building supporting a range of uses including a theatre, library, gallery, museum, community function rooms and offices. It is the most environmentally significant building in the region. Opportunity to deliver high quality events to attract visitation year round.	Project Update Report	Opened November 2023	Deliver

PRIORITY PROJECTS & INFRASTRUCTURE, CONT.

Focus Area Alignment	Project Name	Lead	About	Details	Status	Role
4.7 Town and Community Place- Based Destination Planning	San Remo Structural Plan	Bass Coast Shire Council	<p>Over the next 20 years, it is projected that San Remo will grow by between 400 and as much 2100 additional permanent residents.</p> <p>For San Remo to continue to be a vibrant place to live and visit, Bass Coast Shire Council is developing a structure plan to guide its future growth and development to 2041.</p> <p>The plan will be shaped by technical reports and community feedback, and will provide direction for planning controls, transportation, infrastructure, and other services.</p>	Project Update Report	Community Consultation	Deliver
	Cowes Streetscape Development	Bass Coast Shire Council	Redesign and improvement of Cowes main community and visitor activity hub to respond to population and tourism growth by delivering an attractive social, dining and retail environment, prioritising pedestrian use, generating investment and creating jobs.	Cowes Streetscape Update	Plan Adopted December 2022. Funding required, advocating via State Government Advocacy List	Deliver
	Phillip Island Recreation Reserve Master Plan	Bass Coast Shire Council	The future sporting and recreation precinct for Phillip Island and surrounds	Cowes Streetscape Update	Master Plan adopted September 2023. Funding required.	Deliver
	Smiths Beach Town Plan	Bass Coast Shire Council	The Smiths Beach Town Plan sets out the vision, objectives and priority projects for Smiths Beach across 7 key domains.	Project Update Report	Adopted	Deliver

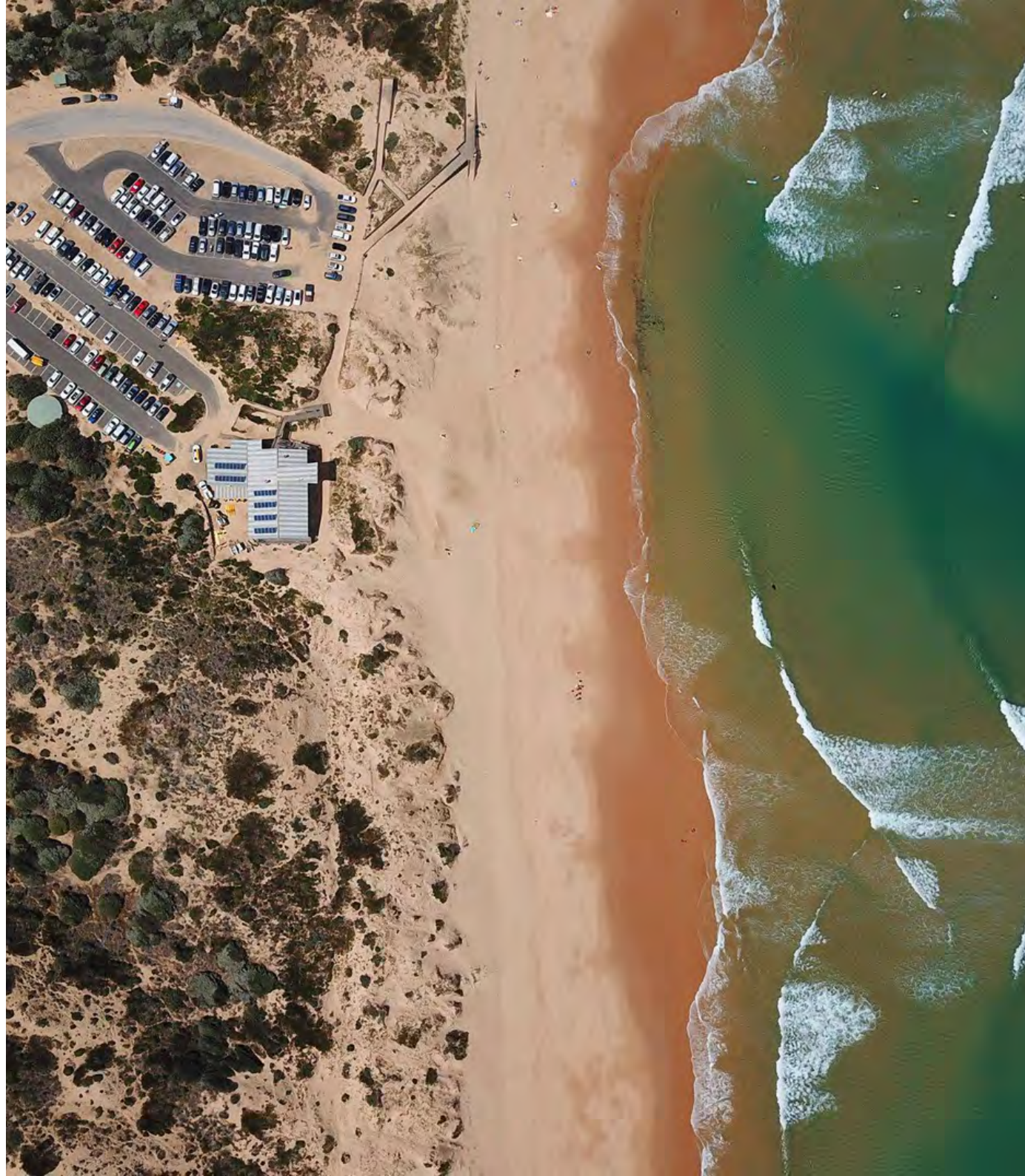
Success Framework

Our community, industry and government stakeholders are committed to realising the full value of tourism; recognising that it goes beyond the traditional economic measures of visitor volume and yield.

To know we are on the right path towards achieving our shared purpose 'Tourism for the Greater Good', and to balance the aspirations of all stakeholders in the destination, a series of indicators across industry, community, environment, economy and visitors will be tracked to measure overall success.

To track the success of this Plan we will use a combination of established measures across active projects and initiatives within the tourism ecosystem, in addition to the development of some new indicators that will be resourced, activated and reported upon through the Plan Governance Model (Focus Areas 1.2).

As new projects are activated, and new technology-enabled data sources emerge, the Success Framework (including benchmarks, indicators, targets and measures) is designed to evolve over time.



SUCCESS BENCHMARK, INDICATORS, TARGETS

	COMMUNITY	ENVIRONMENT	VISITOR	ECONOMY	INDUSTRY
ASPIRATION	We love where we live, and enjoy sharing our place with visitors. We understand who we are, and our visitors do too.	We are leaders of positive impact initiatives that are contributing towards the regeneration of our land, water and wildlife.	To attract high value, values aligned visitors, who contribute towards positive impact programs and have a deep sense of connection with place.	We want to grow the net value of the visitor economy to support a innovative, vibrant and resilient business community.	Local businesses are thriving, feel supported by an engaged and skilled workforce, and continually evolve to support visitor expectations.
BENCHMARK	<ul style="list-style-type: none"> Net Promotor Score 45.4. <p><i>Source Phillip Island and San Remo Community and Industry Visioning Survey (June 2023, n=281, 50% work in tourism, 50% not in tourism)</i></p>	<ul style="list-style-type: none"> 23 Tourism Businesses and Events engaged in DPI Positive Impact Initiative across (as at 17 Nov 2023) - Regen Tourism Alliance, Love Phillip Island, Sustainable & Regenerative Tourism Mentoring Program) 	<ul style="list-style-type: none"> No current benchmark of Visitors sentiment of Phillip Island and San Remo. Consider Review Pro and other data generated research for benchmarks. 	<ul style="list-style-type: none"> \$388m (26.8% total Regional GRP 2021/2022) Day Trip Visitor Yield = \$121pp (June 2023) Domestic Overnight Visitor Yield = \$570 (June 2023) International Overnight Visitor Yield = \$402 (2019) International Overnight = 64,000 (2019) 	<ul style="list-style-type: none"> No current benchmark for Industry Sentiment of Phillip Island and San Remo. 5,400 (39.3%) of Filled Jobs in the region (June 2022). 608 businesses (June 2022)
INDICATORS	<ul style="list-style-type: none"> Net Promotor Score +45.4 (resident) Positive Community Sentiment Measures First Peoples relationship building, partnerships & initiatives. 	<p>Tourism Businesses & Events supporting:</p> <ul style="list-style-type: none"> Positive Impact initiatives of local environmental groups Pursuing sustainable tourism initiatives and accreditations Working towards BCSC goals of Carbon Zero Community by 2030 	<ul style="list-style-type: none"> Net Promoter Score 50+ (non resident travellers) Positive Visitor Sentiment Measures 	<ul style="list-style-type: none"> Visitor Yield % contribution of Regional GRP International Visitor Nights 	<ul style="list-style-type: none"> Positive Industry Sentiment & Future Outlook for Tourism Stability and/or growth in Jobs and # Business.
TARGETS	<ul style="list-style-type: none"> Net Promotor Score of 60+ annually by 2027 (YoY growth prior) 	<ul style="list-style-type: none"> Greater engagement by Tourism Businesses and Events in increasing sustainability measuring (scorecards/certification or other programs) 50% of Tourism Businesses & Events have a Positive Impact Visitor Experience (also includes collaborative partnerships) by 2027. 	<ul style="list-style-type: none"> Net Promotor Score is over 70+ annually by 2027 (YoY growth prior) 	<ul style="list-style-type: none"> Grow International Overnight Visitor Yield to \$550 by 2027 (30% growth). Grow Domestic Overnight Visitor Yield to \$700 by 2027 (20% growth) Grow International Overnight Visitors to 110,000 by 2027 (70% growth) 	<ul style="list-style-type: none"> Over 80% of Tourism Businesses are confident about the Future Outlook for Tourism in Phillip Island and San Remo from 2025. Grow number of jobs in Tourism to 6000 by 2027

MEASUREMENT METHODOLOGY

The below table outlines the 'how' in measuring the achievement of targets.

NOTE. These methodologies are subject to change, based on any change in indicators.

COMMUNITY	ENVIRONMENT	VISITOR	ECONOMY	INDUSTRY
<p>An annual Community Sentiment Pulse* Survey is recommended, but is yet to be confirmed as subject to resource confirmation.</p> <p>Recommended measures to include:</p> <ul style="list-style-type: none"> • Net Promotor Score (benchmark) • Perception of tourism contribution to economy, community, nature • Satisfaction with visitor contribution and behaviour • Alignment with values • Forward outlook • Identify local area issues • Awareness of the DMP <p>Alternative ways to collect community sentiment include leveraging community surveys conducted by regularly by Local Government including the development of the Council Plan.</p>	<p>Specific measures included in the annual Industry Sentiment Survey, of:</p> <ul style="list-style-type: none"> • Positive impact visitor experience initiatives (including partnerships) in their own business. • Sustainability accreditations • Carbon emission reduction targets and tracking • Waste reduction targets and tracking. • Participation & contribution to the DMP's positive impact initiatives (eg Visitor Contribution, Visitor Promise, Regenerative Tourism Alliance Initiatives etc). 	<p>Consider and cost a Visitor Exit Survey*, potentially in partnership with industry. Ongoing completion by visitors.</p> <p>Measure to include:</p> <ul style="list-style-type: none"> • Net Promotor Score (12 month annual target) • Overall quality of experience • Variety • Clarity of local stories of place • Likelihood to visit again • Opportunities for improvement, • Recognition of values in visitor experience • Dispersal • Contribution to positive impact initiatives, including • Demographics also captured to identify source markets. 	<p>Sustainable growth in economic indicators provided by DJSIR, Tourism & Events Unit (at quarterly intervals, but to be reviewed and measured annually)</p>	<p>Industry Sentiment Survey completed annually.</p> <p>Measures to include:</p> <ul style="list-style-type: none"> • Industry confidence next 12 months. • Forward booking sentiment • Workforce Sentiment (retention of staff, values aligned staff, filling skill gaps) • Opportunities for improvement • Capacity Building outcomes <p><i>Jobs Filled and Businesses Data</i> provided by DJSIR, Tourism & Events Unit (also available from Tourism Research Australia Regional Profile)</p>

*New Measures for activation in Focus Area 1.2

Plan Governance

A Destination Stewardship approach to governance will be applied to activate this DMP; the new regional tourism strategy for Phillip Island & San Remo.

A Sustainable Tourism Accord was adopted in October 2016 committing the leading organisations to work together in good faith to support the delivery of outcomes of the VES2035.

In 2023, the Accord Signatories formed a Steering Committee to lead the development of an updated DMP to align with the Victorian Government's *Experience Victoria 2033 Strategy*, and the *Victorian Visitor Economy Master Plan Directions Paper*.

This DMP is the new regional tourism strategy for Phillip Island & San Remo which will be activated via a *Stewardship Governance Model*, therefore superseding the Sustainable Tourism Accord governance model.

Destination Stewardship requires a shared understanding of a common purpose, effective platforms for collaboration and action between Public Sector, Private Industry and Community, with agreed-upon aspirations and measures of success that go beyond traditional growth metrics*.

The success of this approach will rely on the application of a united mindset and will be enabled by a commitment to *Accountability, Continuous Improvement, Community Engagement* and *Advocacy & Partnerships*.

In order to activate the Stewardship Governance Model, a number of Projects need to be scoped and activated, including the following recommended actions:

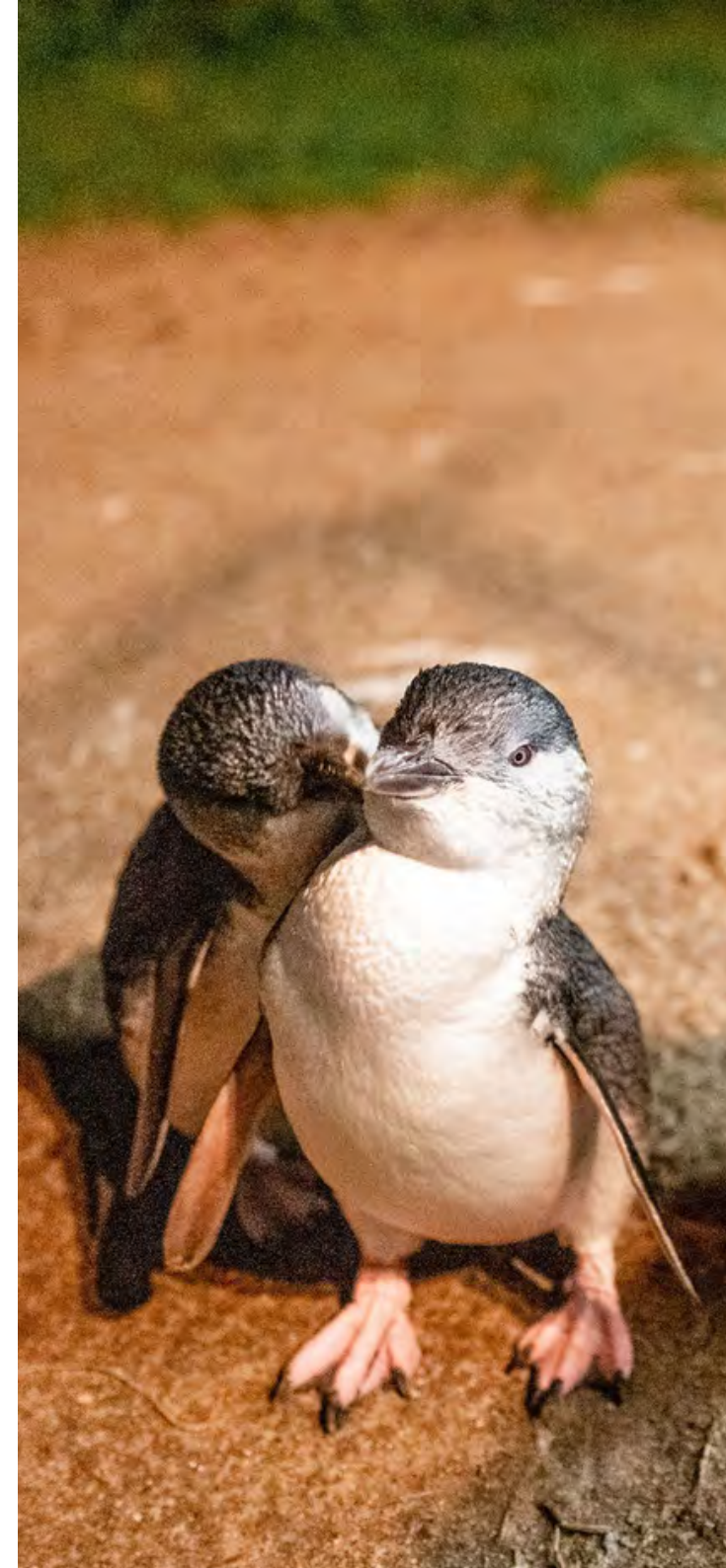
- Accountability Framework
- Plan Communication Framework
- Agile Project Management

The outcome of these Projects will ultimately determine how this DMP is governed, reviewed and updated.

Once these governance projects are established, the Plan Custodians have the scaffolds and tools to scope new projects in the Annual Action Plan, which will outline the details of the forthcoming financial year's projects (derived from the *Possible Projects & Activations* within each of the *Key Focus Areas* within the *Guiding Principles*).

Key performance indicators, relevant timelines and budgets for each project will also be scoped at this stage.

*World Travel and Tourism Council
- Destination Stewardship Framework.



A UNITED MINDSET

REGENERATIVE

A regenerative mindset is about striving for positive, sustainable, inclusive, and resilient outcomes. It encourages a shift from a linear, extractive, and exploitative approach to a circular, restorative, and collaborative one, with an underlying focus on the well-being of people and the planet.

The regeneration of our special place is at the core of our destination's DNA. Rather than a core value, the vision is for Regeneration to become an embedded mindset of this Plan inspiring the local community and visitors in the same way.

AGILE

Being agile looks like embracing change, focusing on delivering value incrementally, and using feedback and collaboration to continuously refine and improve processes and outcomes.

The success of this DMP relies on stakeholders to engage regularly to make collaborative judgments and decisions based on current state insights and data.

Activated as it is intended, this plan should be self-fulfilling, and remain a relevant framework well into the future.

ENABLERS OF SUCCESS

ACCOUNTABILITY OVER RESPONSIBILITY

The stewardship approach, along with the *Accountability Framework* is designed to ensure the lead organisations responsible for the delivery of the Focus Areas remain accountable for the overall outcomes of the plan, rather than simply being responsible for the delivery of individual projects within.

CONTINUOUS IMPROVEMENT

Being committed to and holding each other accountable to continuous improvement will underpin the success of this DMP.

Activating a review mechanism within the *Accountability Framework* allows for flexibility depending on the achievement of the success measures or destination priorities of the day, will enable this DMP to evolve in real-time, negating the need for another major 'update'.

COMMUNITY VOICE

Providing the local community a voice is a fundamental principle of a Stewardship governance model. Community voice opportunities will be provided as part of the new project scoping process and tailored to the impacts of the project. New communication approaches with community will be implemented as part of the DMP Communication Plan, to enable community to be informed of the DMP's progress.

ADVOCACY & PARTNERSHIPS

Plan Governance will also be galvanized by strong partnerships working collectively to achieve the Plan's purpose and aspirations.

Building and maintaining strong stakeholder relationships and advocating for the needs of the destination will ensure the key focus areas in the plan are addressed and activated.

SECTION FOUR

Supporting Information



Glossary

- BCSC** - Bass Coast Shire Council
- BLCAC** - Bunurong Land Council Aboriginal Corporation
- DJSIR** - Victorian State Government Department of Jobs, Skills, Industry and Regions
- DMP** - Destination Management Plan
- DPI** - Destination Phillip Island
- GRP** - Gross Regional Product
- GSTC** - Global Sustainable Tourism Council
- GVA** - Gross Value Added
- KPIs** - Key Performance Indicators
- Nature Parks** - Phillip Island Nature Parks
- PIVIC** - Phillip Island Visitor Information Centre
- RTB** - Regional Tourism Board
- SDG** - Sustainable Development Goals
- VEP** - Visitor Economy Partnerships
- VES2035** - Phillip Island & San Remo Visitor Economy Strategy 2035
- VFR** - Visiting Friends and Relatives
- YoY** - Year on Year



Sustainable Development Goals

What are the Goals?

The Sustainable Development Goals (SDGs) are a set of 17 interconnected and ambitious objectives established by the United Nations in 2015 as part of the 2030 Agenda for Sustainable Development.

These goals aim to address a wide range of social and environmental challenges globally and create a more sustainable and equitable world by the year 2030. The SDGs are designed to address social, economic, and environmental issues, and they are intended to be a universal call to action for governments, businesses, civil society, and individuals.

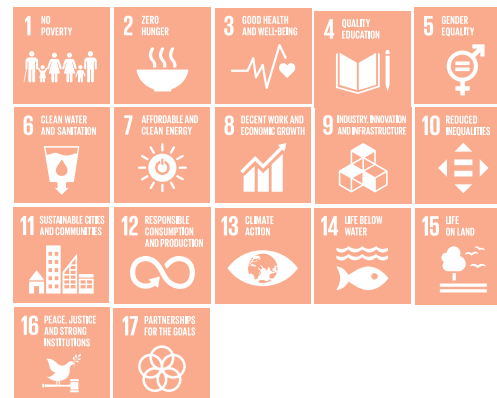
The SDG's serve as a roadmap for governments, organizations, and individuals to work collectively toward a more sustainable and equitable future by 2030.

To learn more about the 17 Goals, and their individual targets at the [United Nations Sustainable Development Goals](#)

Why align to them?

Aligning our output with the United Nations Sustainable Development Goals (SDG) will remind us of our impact to global challenges, enhance the region's reputation as a leading sustainable destination, and help us remain accountable to our purpose.

The Goals that this DMP directly supports are outlined within each Guiding Principle.



Acknowledgements

This Destination Management Plan (DMP) has been developed with careful consideration and ongoing involvement of stakeholders from across the Phillip Island & San Remo tourism ecosystem. The Steering Committee are thankful for the support, as well as the generous contributions of time and information that were shared during the plan's development.

DMP Steering Committee: Kim Storey and Alisha Harding (Destination Phillip Island), Catherine Basterfield (Nature Parks), Karen Ronning (DJSIR), Tina Orr (DPI Board), Shannan Little and Rewa Smith (BCSC)

REGIONAL & STATE	BASS COAST SHIRE COUNCIL	INDUSTRY	COMMUNITY
<p>State</p> <ul style="list-style-type: none"> • Department of Transport and Planning • DJSIR (Tourism Events and Priority Projects) • Parks Victoria • Victorian Tourism Industry Council • Visit Victoria <p>Regional</p> <ul style="list-style-type: none"> • Destination Gippsland • Regional Development Australia - Gippsland (Regional Development Victoria) • Regional Transport Gippsland <p>Consulting Partners</p> <ul style="list-style-type: none"> • Tilma Group • Regeneration Projects 	<ul style="list-style-type: none"> • Councillors • Executive • Sustainable Environment • Infrastructure Maintenance • Place Making • Economic Development & Investment • Communications and Customer & Visitor Services, • Arts, Culture and Heritage 	<ul style="list-style-type: none"> • 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 Circuit • Phillip Island Eco Tours • Phillip Island Hot Springs • Phillip Island Nature Parks - Executive & Operational Team Members • Phillip Island Ocean Escape Retreats • Phillip Island Tenpin Bowling & Entertainment Centre • Ripples n Tonic Farmstay • Searoad Ferries • Silverwater Resort • Tour Local • Wildlife Coast Cruises 	<ul style="list-style-type: none"> • Bunurong Land Council Aboriginal Corporation^ • Bass Coast Reconciliation Network • Phillip Island Land Care • 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 • Community Submissions

Strategic References

Strategies, Plans & Reports

- Bass Coast Council Economic Development Discussion Paper
- 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 Climate Change Action Plan 2020-2030
- 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 Shire Economic Development Framework (DRAFT) - September 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
- Bass Coast Shire Urban Forestry Strategy 2022 - 2040
- 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
- Engage Bass Coast
- Events Placement Program - Capacity & Capability Assessment
- Experience Victoria 2033
- Gippsland Destination Management Plan 2022
- Towards 2030 Gippsland Food, Drink and Agritourism Strategy
- 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 - Beyond the Horizon A 30 Year Conservation Vision, Master Plan, Reconciliation Action Plan, Wildlife Management Plan, 30 Year Conservation
- Phillip Island Conservation Society Submissions
- Unlocking Rural Tourism Strategy
- Visit Victoria - Brand Playbook, Annual Report
- Visitor Economy Recovery Reform Plan - Victorian State Government
- World Travel and Tourism, Destination Stewardship Framework, 2021
- Young Voices in Tourism
- Yuma Yirramboi - Victorian Aboriginal Employment and Economic Strategy

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, DJISIR, 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).



At The Tourism Collective, our vision is to enable tourism for a better future.

We're committed to demonstrating how tourism can be a force for good, and help to enable communities and the special places they love thrive for generations to come.

tourismcollective.com.au

This Destination Management Plan has been developed by The Tourism Collective (tourismcollective.com.au) on behalf of a Regional Steering Group in close consultation with the community, industry, government & and environment custodians.

The content within this report is based on comprehensive research and engagement with the destination's community and industry stakeholders (see Acknowledgements). Data and insights were collated from June 2023-September 2023 to develop the recommendations outlined in this Report.

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