

An aerial photograph of a person swimming in clear turquoise water. The water is so clear that the rocky seabed, covered in green algae, is visible beneath the surface. The person is wearing a light-colored long-sleeved shirt and dark shorts. The background shows dark, jagged volcanic rock formations.

MORNINGTON PENINSULA

DESTINATION MANAGEMENT PLAN

MORNINGTON Peninsula
REGIONAL TOURISM

Acknowledgement of Country

Mornington Peninsula Regional Tourism Board acknowledges and pays respect to the Bunurong/Boon Wurrung people, the traditional custodians of these lands and waters.



Message from the Chair

The Mornington Peninsula has long held a special place in the hearts of visitors and residents alike—a region where coastal beauty, rich heritage, and vibrant community come together to create an extraordinary destination. As we look to the future, this Destination Management Plan lays out an inspiring path forward, inviting us all to protect and enhance what makes the Peninsula unique, while embracing new opportunities for growth and sustainable success.

Crafted through the collaborative efforts of local stakeholders, government, industry experts, and community voices, this plan represents a unified vision. It outlines strategic priorities that will enable us to balance environmental stewardship with economic growth, enhance the visitor experience, and foster connectivity across the region.

At the heart of this plan is a commitment to preserving the Peninsula's natural and cultural assets while elevating its reputation as a world-class destination. The focus on infrastructure, innovation, and quality will help create a lasting impact, one that not only benefits our tourism industry but also enriches the lives of those who call the Mornington Peninsula home.

We are excited about this journey and energised by the potential ahead. By working together, we can ensure the Mornington Peninsula remains a place of beauty, discovery, and inspiration for generations to come.

Roger Lancia

Chairman, Mornington Peninsula Regional Tourism Board



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All images have been supplied by Visit Victoria.

Glossary of Terms

Daytrip Visitor

People aged 15 years and over who travel for a round-trip distance of at least 50 kilometres, are away from home for at least 4 hours, and who do not spend a night away from home as part of their travel. Same day travel as part of overnight travel is excluded.

Mornington Peninsula

The Mornington Peninsula is a defined tourism region in Victoria, which includes two local Government areas – Frankston and Mornington Peninsula. The region is represented by a regional tourism Board (Mornington Peninsula Regional Tourism), charged with the long-term and overarching strategic vision and direction for the Mornington Peninsula.

Overnight Visitor

People aged 15 years and over who undertake an overnight trip of one night or more and at least 40 kilometres away from home are referred to as overnight visitors. Only those trips where the respondent is away from home for less than 12 months are in scope of the NVS.

International Visitor

A person is defined as an international visitor to Australia if they are currently a resident overseas, have been in Australia less than one year and are aged 15 years or over.

Acronyms

ART

Australian Regional Tourism

AUS

Australia

CALD

Culturally and Linguistically Diverse

CBD

Central Business District

DJSIR

Department of Jobs, Skills, Industry and Regions (State Government)

DMP

Destination Management Plan

EV

Electric Vehicle

FCC

Frankston City Council

LAAP

Local Area Action Plan

LGA

Local Government Area

MPRTB

Mornington Peninsula Regional Tourism Board

MPSC

Mornington Peninsula Shire Council

RTB

Regional Tourism Board

TRA

Tourism Research Australia

VFR

Visiting friends and relatives

VIC

Victoria



Executive Summary

Background

The Mornington Peninsula Destination Management Plan was prepared by Urban Enterprise for the Mornington Peninsula Regional Tourism Board (MPRTB).

The purpose of the Destination Management Plan is to provide a 5-year strategic and unified direction for the development of the visitor economy with a focus on awareness, product development, and supporting infrastructure. This will be achieved by empowering and supporting the local tourism industry.

The key role of MPRTB is to strengthen the Mornington Peninsula Visitor Economy through industry development, as well as develop marketing initiatives to drive visitation during low and shoulder seasons.

Experience Victoria 2033 is the key strategic document guiding development of the Victorian visitor economy. Other key documents which influence the broader strategic direction of this plan include the Local Area Action Plans, Mornington Peninsula Visitor Economy Workforce Development Analysis & Action Plan and Mornington Peninsula Visitor Services Strategy.



The Visitor Economy

Mornington Peninsula is Victoria's leading tourism region boasting the highest density of visitors of any of Victoria's regions and has the largest number of tourism businesses. In 2023, the region attracted approximately 8 million visitors, including 6.1 million day trip (76%) and 1.9 million overnight (24%) visitors. This total figure includes 177,000 international visitors.

The Mornington Peninsula Region is made up of five sub regions including Frankston, Northern Peninsula, Southern Peninsula, Hinterland and Western Port. Southern Peninsula has historically attracted majority of visitors and is often at capacity during the peak summer period. Dispersal of visitors has occurred over the past 10 years, with growth in visitation in the Hinterland and Western Port through investment in new product – particularly food and drink businesses.

The Product Pillars for the Mornington Peninsula include:

- Destination Food and Drink
- Spa and Wellness
- Events and Attractions
- Golf
- Coast and Nature

Challenges & Opportunities

- Severe peaks and troughs in key challenges and opportunities identified through engagement and research for the Destination Management Plan include:
- Severe peaks and troughs in visitation throughout the year, particularly for smaller townships and the Southern Peninsula.
- Limited and outdated public infrastructure throughout the region, as well as poorly maintained public land and assets.
- Lack of tracks and trails connecting townships, as well as poorly maintained and signed trails.
- Limited supply of large-scale, commercial accommodation to support peak season visitation.
- Lack of public transport limiting the mobility of the workforce and visitors.
- Lack of First Nations' tourism experiences and products available within the region.
- Workforce attraction and retention.
- Planning regulation limiting investment and timeframes for planning approvals
- Current governance framework leads to overlap in services and underfunding of the Regional Tourism Board.
- Opportunity to leverage premium experiences and leverage interstate and international visitation from this.
- Focus on development of a sustainable tourism industry.



8.0M visitors

1.9M
Overnight
visitors

6.0M
Day trip
visitors



\$1.8B visitor spend

\$1.1B
Overnight
spend

\$701M
Day trip
spend

Destination Management Framework

Vision

“ The Mornington Peninsula is **Australia's leading premium coastal destination**, presenting unparalleled gastronomic, lifestyle and wellness experiences of world class standard. ”

Objectives

1. To increase geographic dispersal, with growth in visitation to Hinterland, Western Port, Southern and Northern Peninsula and Frankston sub regions.
2. To increase visitor yield through higher spend and increased length of stay.
3. To enable an unparalleled visitor experience and satisfaction with visitors enriched by the highest level of service and supporting quality infrastructure.
4. To increase awareness of the region as a premium coastal destination, both interstate and internationally to grow these segments.

Targets

- Increase international visitation from 177,000 visitors in 2023 to 250,000 visitors in 2028.
- Increase domestic overnight visitor yield from \$554 per person per visit in 2023 to \$650 per person per visit in 2028.
- Increase interstate visitation from 160,000 visitors in 2023 to 300,000 visitors in 2028.
- Increase the proportion of visitation to the Hinterland and Western Port from 24% and 6% in 2023 to 28% and 10% in 2028, respectively.

Themes

Theme One

Coastal Activation

Improve year-round use and activation of the Mornington Peninsula's coastal assets.

Theme Four

Governance

Work with industry and Local Government to support the growing visitor economy and streamline destination management throughout the region.

Theme Two

Destination Sustainability

Develop sustainable practices to deliver outcomes that are positive for the environment, economy and community.

Theme Five

Business Development & Support

Ensure the tourism industry is well-connected and supported through networking and implementation of the Workforce Plan.

Theme Three

Infrastructure & Amenity

Support the growing visitor economy through investment in critical visitor economy infrastructure.

Theme Six

Destination Marketing

Continue to evolve the destination and ensure the destination profile is reaching new and emerging markets.



1. Introduction





1.1 Overview

Mornington Peninsula Regional Tourism Board (MPRTB) engaged Urban Enterprise to prepare a Destination Management Plan (DMP) for the Mornington Peninsula tourism region.

This plan has been informed by independent research and analysis, as well as consultation with industry representatives, community groups, businesses, Councils and Government stakeholders. Significant contribution was provided by the vibrant and engaged local tourism industry who generously shared their insights through the development of the Local Area Action Plans and the business survey.

The purpose of the Destination Management Plan is to provide a strategic and unified direction for the development of the visitor economy with a focus on awareness, product development, and supporting infrastructure. This will be achieved by empowering and supporting the local tourism industry.

The DMP for the Mornington Peninsula follows the Guide to Best Practice in Destination Management, as determined by Australian Regional Tourism (ART). This will ensure MPRTB can support growth in and the sustainable management of the visitor economy.

Successful destination management is a holistic process that ensures tourism adds value to the economy, social fabric and ecology of our communities. It is achieved through strong leadership with consideration of the three following factors:

- **Place** - Defining the destination in the eyes of the visitor and communities of interest and understanding the visitor journey to and within the region.
- **People** - Cohesive governance and strong leadership, engaged industry and qualified and experienced workforce.
- **Product** - Motivating products, quality infrastructure and experiences on offer that draw visitors and provide to visitor needs.



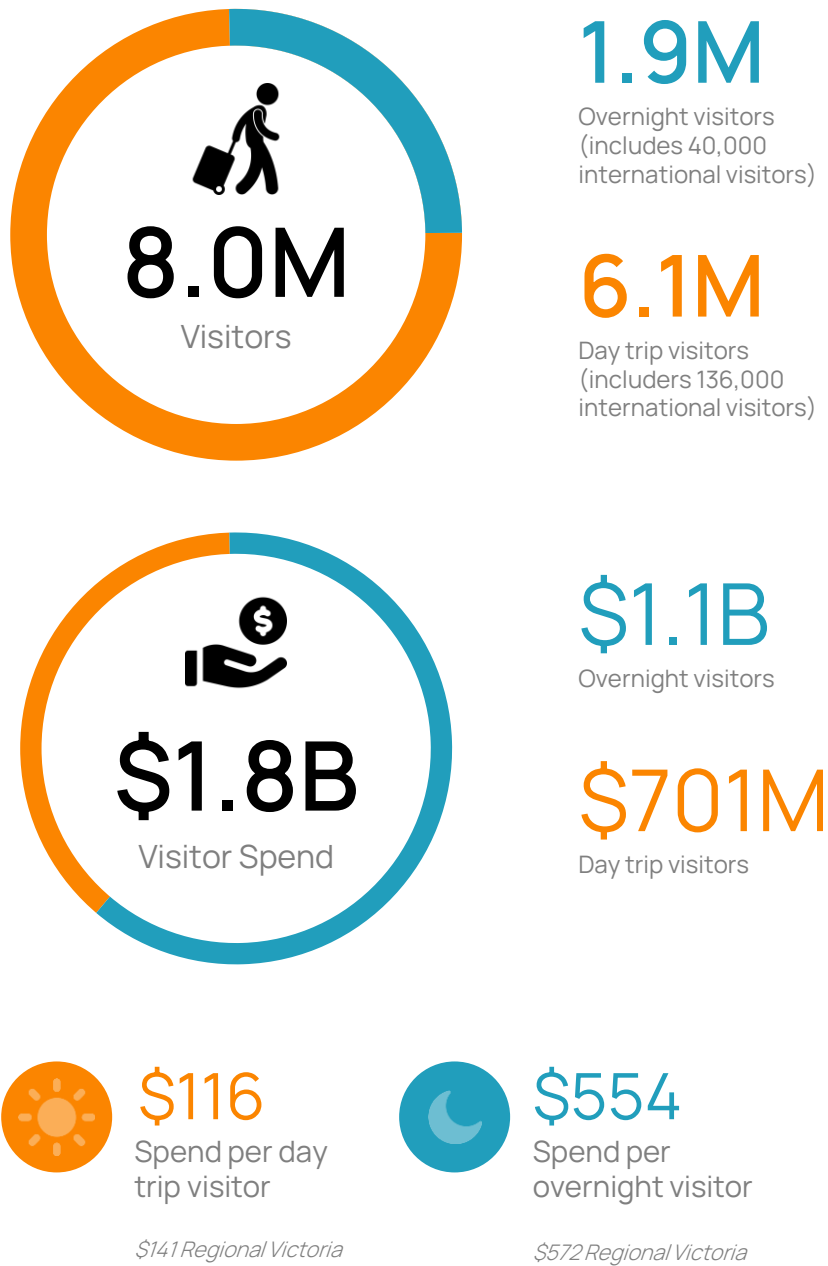
2. The Mornington Peninsula Visitor Economy



2.1 Visitor Economy Overview

Mornington Peninsula is Victoria's leading tourism region. In 2023, the region attracted approximately 8 million visitors, including 6.1 million day trip (76%) and 1.9 million overnight (24%) visitors. This total figure includes 177,000 international visitors.

Figure 1. Mornington Peninsula Visitation Overview



Source: Tourism Research Australia (TRA) National Visitor Survey (NVS) year-ending December 2023. Please note the information above relates to domestic day trip and domestic overnight visitors only, international visitors make up less than 1% of visitation to the Mornington Peninsula.

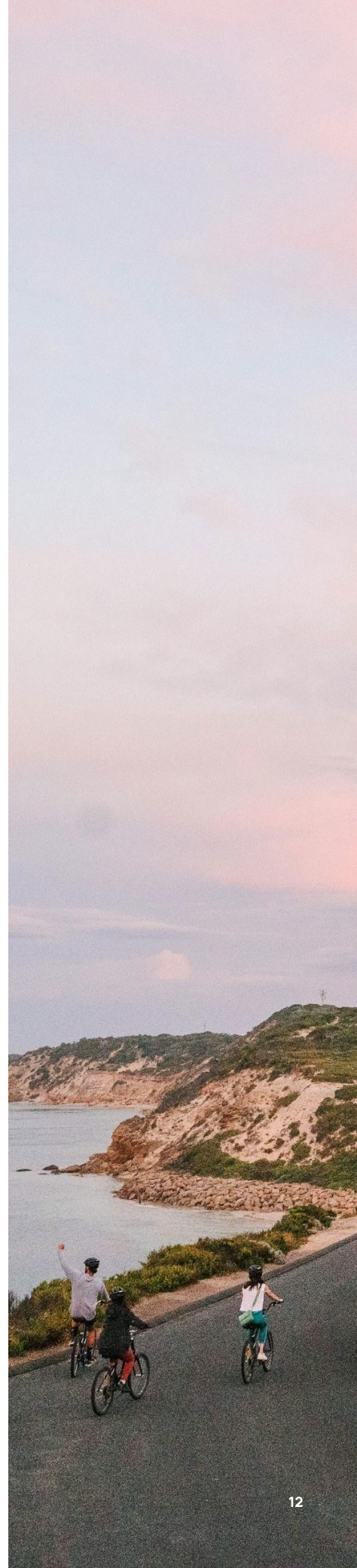
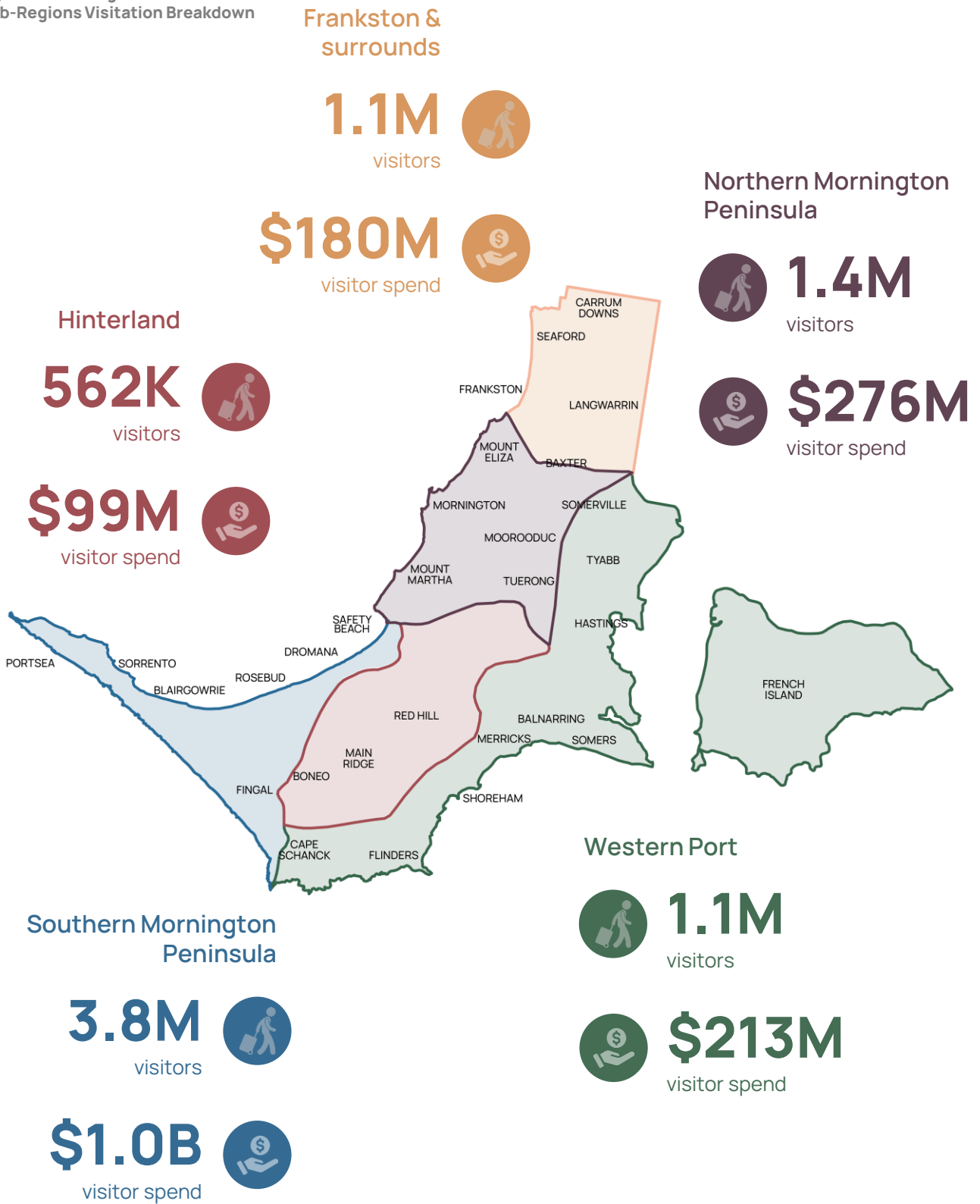


Figure 2. Mornington Peninsula Sub-Regions Visitation Breakdown



Source: Proportions from the Mornington Peninsula Visitor Journey Report 2022 applied to TRA NVS and IVS data for year-ending December 2023.

2.2 Visitation Trends

This section explores the trends in visitation to Mornington Peninsula, including historic visitation, dispersal throughout the region and activity consumption. Data within this section draws on Tourism Research Australia (TRA) data, the widely accepted Australian Government data source tracking visitation across Australia. Unless stated otherwise, this data has been presented for the region for the 2023 calendar year and Mornington Peninsula refers to the Frankston City Council and Mornington Peninsula Shire Council.

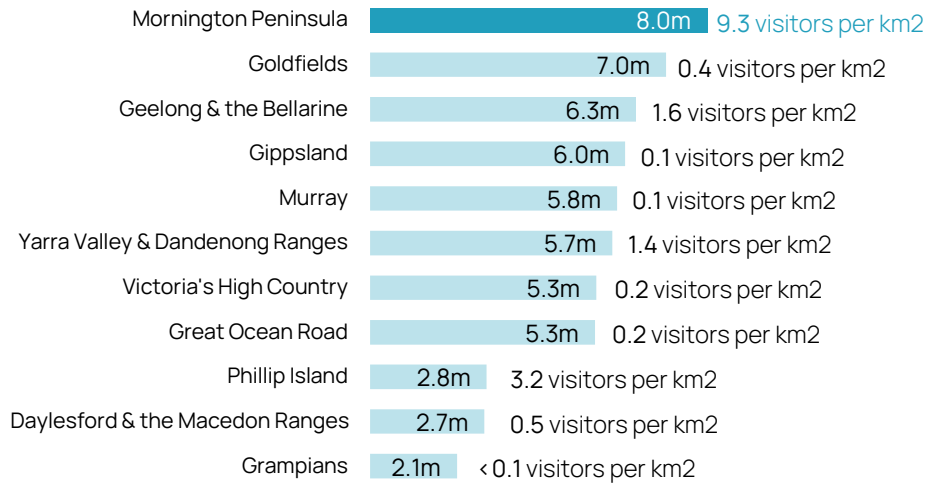


Benchmarking

When compared to destinations of a similar distance to Melbourne, such as the Yarra Valley, Goldfields and Geelong and the Bellarine, Mornington Peninsula has a considerably larger visitor economy. This is significant when considering the size of the Mornington Peninsula tourism region, encompassing only two local Government areas. This equates to approximately 9.3 visitors per square kilometre. This is almost three times the density of visitors to the next destination which is Phillip Island, with a visitor density of 3.2 visitors per square kilometre. The graph below highlights the significance of the visitor economy in the Mornington Peninsula.

The high density of visitors highlights the need to encourage dispersal of visitors throughout the region, and throughout the year, as well as extract maximum yield from these visitors to ensure local businesses are benefiting from the high visitation.

Figure 3. Visitation to Victoria's Tourism Regions



Source: TRA IVS and NVS, Victoria's Tourism Regions for year-ending December 2023.

Historic Visitation

Prior to the COVID-19 pandemic, visitation to the Mornington Peninsula peaked at 8.5 million visitors. The most recent data available (year-ending December 2023) suggests after two years of disrupted travel (between 2020 to 2021), domestic visitation is recovering and has surpassed 2018 visitation.

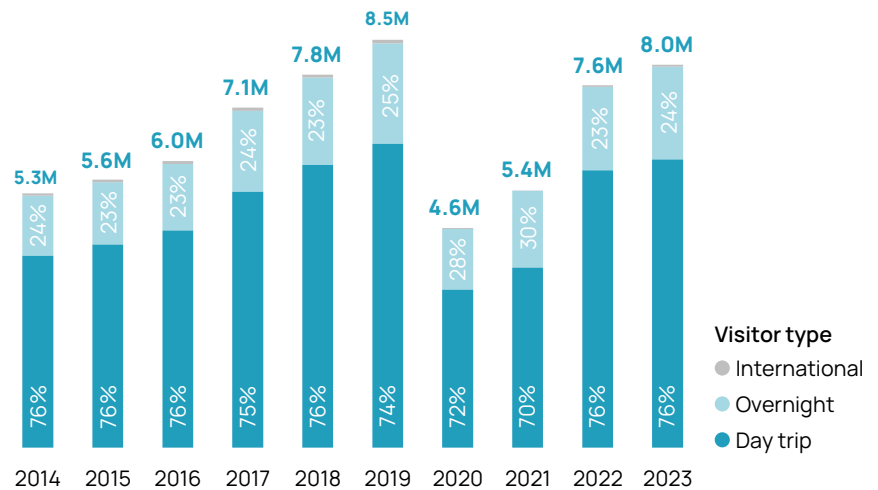
Over the past 10 years, the day trip visitor market has made up the majority of visitors to the Mornington Peninsula. The region's proximity to Melbourne and diversity of products and experiences lends itself as an attractive day trip visitor destination. The historic strength of the day trip visitor market is highlighted in the figure below.

Although previous strategies have attempted to increase the proportion of the overnight visitor market, historic visitation shows the strength of the day trip market. Melbourne's growing population, and improved connections to this market via the Peninsula Link, have made it difficult and will continue to make the shift difficult. Therefore, it is important that Mornington Peninsula recognises its strength as a day trip destination and capitalises on extracting maximum yield from these visitors, whilst also providing a memorable experience to encourage repeat visitation.

Historic visitation shows that international visitation to the Mornington Peninsula is a low proportion of the overall visitor market. With the region's proximity to Melbourne, there is opportunity to strengthen visitation from the international market.



Figure 4. Mornington Peninsula Historic Visitation



Please note international visitation accounts for less than 1% of visitors to the Mornington Peninsula.

Source: TRA IVS and NVS, Mornington Peninsula tourism region for the year-ending December 2023.



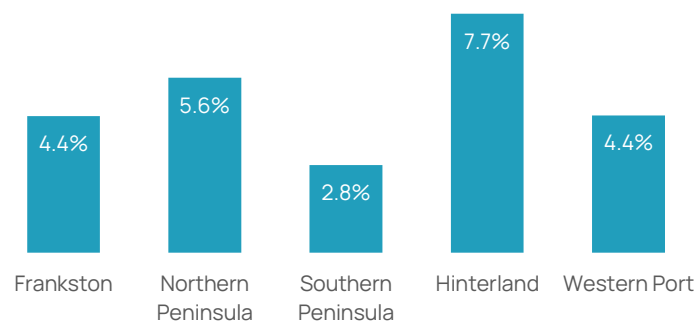
Visitor Dispersal

The dispersal of visitors throughout the Mornington Peninsula is highly varied. Of the approximately 8 million visitors to the region, over a third visited the Southern Peninsula on their journey. This is significant when compared to the Western Port region, encompassing townships such as Hastings and Flinders, only capturing 6% of the visitors in 2023.

The figure below provides an overview of the historic growth per annum of each of the Mornington Peninsula sub regions. The data shows higher levels of growth to all sub-regions than the Southern Peninsula, demonstrating that dispersal strategies since 2014 have been successful. The Hinterland has experienced the highest growth rate of all sub regions, driven by investment in food, drink and farmgate destinations.

A key objective of the Mornington Peninsula DMP will be to help grow tourism product and experiences in destinations with smaller visitor economies. This will encourage visitor dispersal out to the smaller visitor economies, as well as relieve congestion issues felt by townships on the Southern Peninsula who experience overcrowding, particularly in the peak seasons. Marketing, visitor services and signage can also play a role in encouraging dispersal on the Peninsula.

Figure 5. Mornington Peninsula Sub-regional Visitation Growth p.a.



Source: TRA NVS, year-ending December 2014 to 2023.



Activity Engagement

The Mornington Peninsula is home to almost 4,000 tourism businesses, employing just under 13,000 people. These businesses are key to servicing the visitor economy and attracting visitors in the region.

Figure 11 highlights key activity categories visitors engage in when visiting the Mornington Peninsula. (This only includes visitors travelling more than 50 kms and staying more than 4 hours on the Mornington Peninsula).

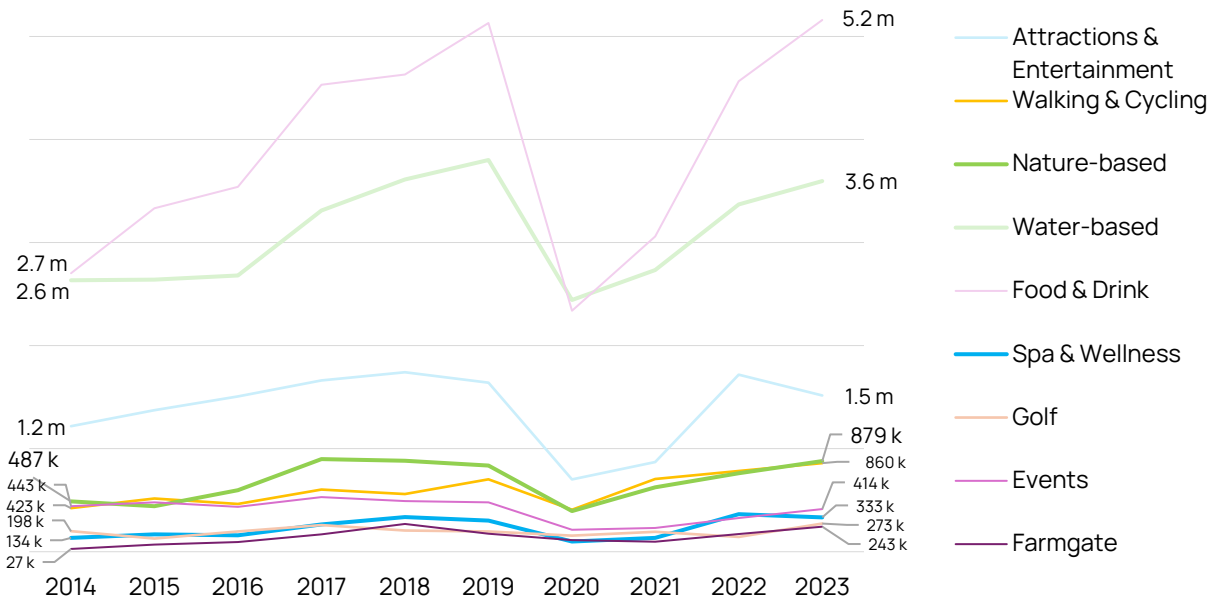
As shown in the figure below, visitors to the Mornington Peninsula are engaging heavily with food and drink venues. The strength of this engagement not only reflects the increase in visitation to the Mornington Peninsula, but also the large investment by the private sector towards food and drink businesses, including destination venues, wineries, breweries, farm gate and distilleries.

Water based activities has also shown some growth, but not to the same degree as food and drink. This may reflect the lower levels of investment in infrastructure to support water-based tourism.

Spa and wellness investment, particularly in geothermal spas, has changed the way visitors perceive the Mornington Peninsula, with the region now notably known as Australia's leading spa and wellness destination. Growth in spa and wellness activities has increased by 300% since 2014.

Investment in spa and wellness and high-quality food and drink venues help to position the Mornington Peninsula as a premium destination in Victoria and Australia.

Figure 6. Mornington Peninsula Visitor Activity Consumption



Source: TRA NVS and IVS, year-ending December 2023.



2.3 Product Pillars

The primary strength and appeal of the Mornington Peninsula is its coastal landscape and premium products and experiences.

The adjacent chart highlights the key product pillars for the Mornington Peninsula. These overarching pillars are key drivers of visitation and link to points of competitive advantage.

Whilst the Mornington Peninsula has a strong visitor economy and is rich in product and experiences, there is opportunity for the development of new products and experiences particularly those that strengthen visitation in off-peak season and attract visitors and disperse visitors.

Destination Food and Drink

1

Mornington Peninsula has a diverse dining and produce scene, home to numerous chef-hatted restaurants, world-class wineries, breweries and distilleries, and seasonal farm gates. The strength and diversity of this pillar plays a critical role in underpinning a visitor's overall experience.

Spa & Wellness

2

With the addition of the new Alba Thermal Springs and Spa in 2022, in addition to the Peninsula Hot Springs, spa and wellness is a large driver visitation to the region. Smaller scale spas, such as Aurora Spa and Bathhouse, have aided in the strengthening of this pillar.

Events & Attractions

3

The Mornington Peninsula is home to major attractions and events that motivate visitors to the region and drive year-round visitation. Key attractions businesses include Mornington Racecourse, Arthurs Seat Eagle and Enchanted Adventure – Home to Tree Surfing. In addition, the Mornington Peninsula Region many signature events including Peninsula Vine Hop and South Side Festival, Frankston.

Golf

4

Mornington Peninsula is one of Australia's leading golf destinations. It has 14 courses listed in Australia's top 100 golf courses and includes a variety of public access and exclusive private courses. No other region in Australia boasts the number of high-quality courses as the Mornington Peninsula Region.

Coast & Nature

5

A key driver of visitation to the Mornington Peninsula are coasts and nature-based assets, its mix of two bays, sandy bay beaches and wild ocean beaches provides the backdrop for many water-based activities. Icons of the Mornington Peninsula include Point Nepean, Cape Schanck, Mornington Bathing Boxes, Port Phillip Bay, Western Port Bay and Gunnamatta Surf Beach.

2.4 Supporting the Visitor Economy

Key to a successful visitor economy is the quality and availability of supporting infrastructure, such as visitor accommodation, visitor servicing, transport and access, and township amenity. Although the Mornington Peninsula is home to world-class products and experiences, at present, the supporting infrastructure does not meet these same standards. The standard of the Mornington Peninsula's supporting infrastructure is explored in this section.

Visitor Accommodation

Although majority of overnight visitors to the Mornington Peninsula stay in private holiday homes and short-term rentals, the key to encouraging visitor dispersal and extending length of stay within the region will be the availability and quality of commercial accommodation. The State Government short term rental tax may impact the availability and affordability of short-term accommodation which may have a significant impact on overnight visitation.

Some high-quality accommodation has been developed in the region, notably InterContinental Sorrento, RACV Cape Schank Resort, and Jackalope Hotel, yet increased capacity is needed to service the 8 million visitors per year.

Large-scale, commercial hotel accommodation, as well as holiday and caravan parks, are likely to deliver positive outcomes for the region's visitor economy.

Visitor Servicing

Visitor servicing on the Mornington Peninsula is currently undertaken by the MPRTB and both Local Governments. Whilst the Local Governments oversee the physical Visitor Information Centre's, collateral and signage within and surrounding the centres is confusing to the consumer and should be reviewed to ensure a consistent message is shared. At present, there is duplication in the delivery of online visitor information, this can create confusion for the consumer and lacks efficiency.

A Visitor Services Review undertaken by MPRTB looks at the provision and delivery of visitor servicing in the region, including physical visitor information centres, branding, marketing, signage and gateways, and physical and digital collateral and provides recommendations to achieve consistency and increase length of stay and spend.

Public Realm

Public infrastructure across the Mornington Peninsula region is outdated and not maintained to the standard expected by visitors to the region. Furthermore, the quality of public infrastructure does not match the quality of the privately owned products and experiences throughout the region. This includes the quality of beach side amenities, visitor amenities, roads, footpaths, landscaping, pedestrian safety and accessibility.

Investment in the continual maintenance of infrastructure is needed to elevate the region to the premium standard that private establishments hold themselves to.

Foreshore Amenity

The quality and condition of foreshore amenity across the Mornington Peninsula is inconsistent and for the most part below the standard of other coastal destinations around Australia. Whilst some foreshores have received significant investment to make them wheel-chair accessible, deliver new visitor amenities and facilities, many foreshore reserves are offering outdated and limited visitor amenities.

High-quality examples within the region include Frankston Foreshore Reserve, Point Leo Surf Beach which has been recently upgraded with a new visitor amenity precinct including shelter, toilets, change rooms, showers and a kiosk.

Transport & Parking

Mornington Peninsula is well-connected to Melbourne via Peninsula Link, as well as Geelong and the Bellarine via the Searoad Ferries Sorrento-Queenscliff service.

Frankston is connected to Melbourne via the V-Line rail network, however, rail connectivity further down the peninsula is severely deficient. Other public transport options, such as bus routes, are limited in their scheduling and routes.

Like many other regions across Victoria, the roads within the Mornington Peninsula need repair works and upgrades to ensure the continued safety of road users, many roads are in poor condition and have non-existent or unsafe shoulders. Further to this, there is a lack of safe pedestrian walkways and footpaths, forcing many pedestrians to walk on roads.

2.5 Target Markets

Domestic Visitor Market Segments

Helix Personas are a classification system for each type of consumer in Australia, and the communities with which they belong to. The classification system goes beyond geo-demographics and incorporates attitudes, values and behavioural aspects providing psychographic modelling on a grand scale.

Of the 6 helix communities, the Leading Lifestyles and Metrotechs communities are the primary target markets for the Mornington Peninsula. These markets are both high yielding and link well to the product strengths of the region.

Melbourne has long been the key source market for domestic visitors, however the awareness of the Mornington Peninsula in large catchment areas such as Sydney and Brisbane is low. This is reflected in the very low levels of interstate visitation, The quality of product and alignment to Leading Lifestyles and Metrotechs in both Sydney and South-East Queensland presents opportunity for growth beyond the easily accessible Melbourne market.

Figure 7. Alignment to Helix Personas

Helix Personas	Leading Lifestyles	Metrotechs	Aspirational	Hearth & Home	Doing Fine	Fair Go
Characteristics	<ul style="list-style-type: none"> • High income • Educated • Progressive • Career focused • Mid-life/mature 	<ul style="list-style-type: none"> • Socially aware • Successful • Career focused • Culturally diverse • Young to mid-life 	<ul style="list-style-type: none"> • Young • Singles and couples • Tech savvy • Moderate income 	<ul style="list-style-type: none"> • Families and empty nesters • Average Australian • Not culturally diverse • Moderate income 	<ul style="list-style-type: none"> • Migrant groups and older Australians • Modest income 	<ul style="list-style-type: none"> • Living alone • Single parents • Low income • Low employment • Low education
Product Preferences	<ul style="list-style-type: none"> • Food and wine • Arts and culture • First Nations experiences • Nature 	<ul style="list-style-type: none"> • Entertainment and nightlife • Restaurants • Exercise • Shopping • Beach 	<ul style="list-style-type: none"> • Health and nutrition • Entertainment • Attractions • Sport • Nature 	<ul style="list-style-type: none"> • Fishing • Boating • 4WDiving • Food and wine • Caravan and camping • Beach 	<ul style="list-style-type: none"> • Attractions • Shopping • Sport 	<ul style="list-style-type: none"> • Pubs and clubs • Sport • Take away
Yield	High	High	Moderate	Low	Low	Low
Share of overnight visitors	34% of overnight visitors	31% of overnight visitors	8% of overnight visitors	14% of overnight visitors	6% of overnight visitors	6% of overnight visitors
Target Markets	✓ ✓	✓ ✓		✓		

Source: Helix Personas segmentation by Roy Morgan.

International Market Segments

Of the 8 million visitors to the Mornington Peninsula, only 134,000 are recorded as international visitors. Whilst the proportion of international visitors to Mornington Peninsula is low, less than 1%, this market is of particular importance for growing off-peak and mid-week visitation.

In 2023, 1.9 million international travellers visited Melbourne. The Mornington Peninsula captured 9% of these international visitors to Melbourne. Due to the region's close proximity to Melbourne, the majority of international visitors only day trip to the Mornington Peninsula.

The Mornington Peninsula has the potential to grow the capture rate of international visitors travelling to Melbourne. As shown in the figure below, the Mornington Peninsula meets the motivational requirements of many international markets, primarily quality food and wine, and the world-class beauty of the region.

Figure 8. International Market Segmentation

Source Market	China	New Zealand	UK	USA	India	Asia (Other) Singapore, Malaysia, etc.	Europe (Other) Germany, Italy, France, etc.
Motivations	<ul style="list-style-type: none"> World class beauty and Nature Food and wine World class aquatic and coastal Romantic destination 	<ul style="list-style-type: none"> Good food and wine World class beauty and nature 	<ul style="list-style-type: none"> Good food and wine World class beauty 	<ul style="list-style-type: none"> Good food and wine World class beauty 	<ul style="list-style-type: none"> World class beauty 	<ul style="list-style-type: none"> Good food and wine World class beauty 	<ul style="list-style-type: none"> Good food and wine World class beauty
Yield	\$\$\$	\$	\$	\$\$	\$	\$\$	\$
Melbourne	10%	15%	8%	9%	8%	31%	10%
Mornington Peninsula	7%	10%	17%	8%	5%	26%	14%
Target Market	✓ ✓		✓	✓		✓ ✓	✓ ✓

Source: Tourism Research Australia



3. Strategic Context





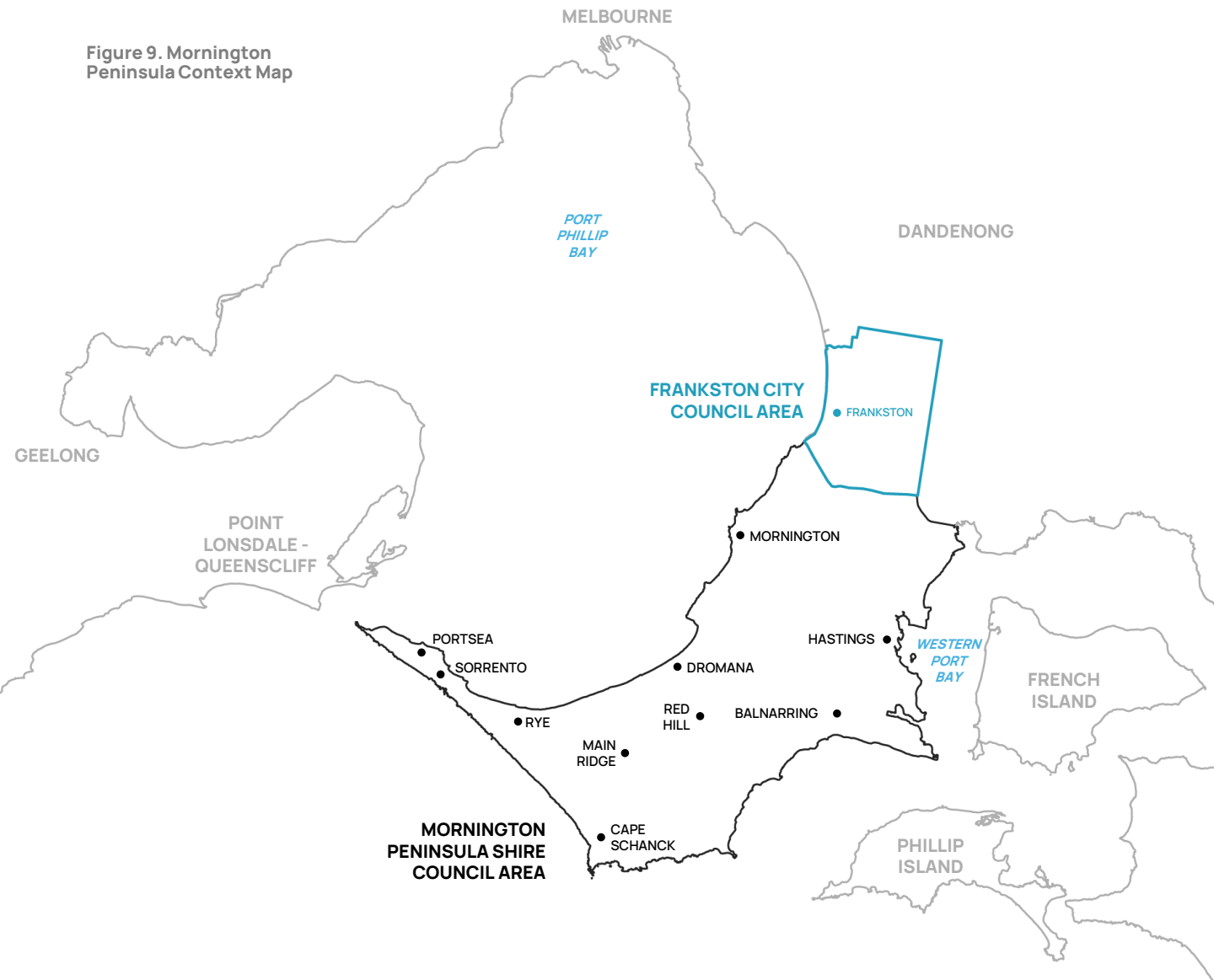
3.1 About the Destination

The Mornington Peninsula is located 75 kilometres south-east of Melbourne. The region incorporates the Frankston City Council and Mornington Peninsula Shire Council areas, encompassing an area of 854 square kilometres and home to approximately 308,000 residents.

The Mornington Peninsula is renowned as a summer holiday favourite, with the region surrounded by coastlines. The region is home to premium products, including geothermal spas, golf courses, Chef's Hatted restaurants, and world-class wine, beer and distills that also motivate visitation year-round.

The study area for this project is the Mornington Peninsula tourism region, which consists of five sub-regions. Each of these sub-regions have distinct characteristics in terms of their tourist attractions, communities and the level of tourism development. This is explored in each of the Local Area Action Plans (LAAP) for the sub-regions. The five regions are outlined in the figure below.

Figure 9. Mornington Peninsula Context Map





3.2 Strategic Alignment

Alignment to existing strategic policy and direction is critical to the success of the Mornington Peninsula Destination Management Plan.

Key documents reviewed include local, regional, State and Federal Government plans and policies. These are listed in the table below and have been drawn on throughout the report as relevant.

Experience Victoria 2033 is the key strategic document guiding development of the Victorian visitor economy. The document provides a range of findings and strategic direction relevant to the Mornington Peninsula. This document has been further explored in this section.

The previous Mornington Peninsula Region Destination Management Plan is another key document explored in this section. Analysis of the growth in the visitor economy since the development of the previous DMP will be critical to understanding where to go next.

Figure 10. Strategic Documents Reviewed

National

- Thrive 2030 Strategy

State

- Experience Victoria 2033
- Victoria's Golf Tourism Strategy 2018 - 2023
- Visitor Economy Master Plan Directions Paper March 2022
- Victorian Visitor Economy Recovery And Reform Roadmap (2020)

Regional

- Mornington Peninsula Region Destination Management Plan
- Mornington Peninsula Visitor Economy Workforce Development Analysis & Action Plan
- Mornington Peninsula Local Area Action Plans (LAAP)
- Destination Victoria Brand Strategy Playbook (2022)

Local

- Frankston City Visitor Economy Strategy 2019-2024
- A Thriving Peninsula 2033 – Economic Development And Tourism Strategy
- Imaging Peninsula 2040 Community Vision
- Mornington Peninsula Arts & Culture Plan 2022-2024
- Council And Wellbeing Plan 2021-2025

Mornington Peninsula Local Area Action Plans

In 2023, MPRTB developed 5 Local Area Action Plans (LAAP) for its sub-regions, which include:

- Frankston and surrounds
- Northern Mornington Peninsula
- Hinterland
- Western Port
- Southern Mornington Peninsula

The LAAPs identify visitor economy needs, challenges and opportunities at the local level to ensure the greater regional visitor economy can thrive.

The LAAPs are managed by an Advisory Committee, established for each sub-region. These committees have brought together community, industry and local government stakeholders to ensure the needs of local industry are met.

Priorities and actions within the LAAPs have been incorporated into the destination management plan to ensure the over success and unity of the region.

Key directions from the LAAPs include:

- Wayfinding
- Transport infrastructure
- Accessible tourism
- Workforce development
- Product packaging
- Growing the visitor economy on shoulder periods and mid-week
- Collaboration with industry and Government to attract business events

Mornington Peninsula Destination Management Plan (2012)

The first DMP for Mornington Peninsula was developed in 2012 when MPRTB was first established.

The DMP identifies a number of unique challenges facing the Mornington Peninsula that, at the time, were critical to maintaining its existing destination competitiveness and growing its tourism industry. Whilst many of the challenges have been resolved with investment in both the private and public sector, a number of challenges are still relevant to this day. These are highlighted below and will help inform the development of the new DMP.

- Developing a stronger presence in interstate and international markets.
- Providing clearer direction to industry and community as to the parameters for future tourism development in the Mornington Peninsula region.
- Managing core public assets, such as coastal zones and national parks, for the ongoing benefits of residents, visitors and the environment.
- Addressing barriers to regional visitation and dispersal concerning transport, including quality of navigational signage, public transport options and taxi services.
- Managing strong summer, holiday and weekend concentration of visitation to the Mornington Peninsula region.
- Managing the ongoing transition of rural and green wedge areas from commercial farming to hobby and tourism related land uses.

- Addressing infrastructure constraints across the Mornington Peninsula region, ranging from communications black-spots to villages with inadequate parking and coastal marina infrastructure.
- Dealing with a three-level system of government that present continually changing and often conflicting policies and legislation.

In total, the previous DMP identified 23 initiatives, contained within 5 focus areas to support the Mornington Peninsula visitor economy.

Experience Victoria 2033

The Victorian State Government's Experience Victoria 2033 is the state's key strategic document to guide growth and the development of the Victorian visitor economy for the next 10 years.

Mornington Peninsula's DMP will ensure tourism objectives for the region closely align to those set out for the State in Experience Victoria 2033. Alignment will be critical to ensure the success of the DMP.

Five product priorities reflecting the strengths of Victoria's tourism industry have been identified by the State Government to have the greatest potential to increase visitor yield over the next decade. These include:

- First Peoples
- Arts and Culture
- Wellness
- Nature
- Food and Drink

Mornington Peninsula's alignment to Victoria's product priorities is explored in the table adjacent.

Figure 11. Mornington Peninsula Alignment to Experience Victoria Product Pillars

First Peoples

Emerging

An emerging product opportunity for the Mornington Peninsula. Product and experience development opportunities to be led by First Nations people with support from Local Government and MPRTB.

Arts & Culture

Secondary Product Strength

A product strength for the region with a robust events calendar and arts experiences available in Frankston.

Wellness

Primary Product Strength

Strong alignment for the Mornington Peninsula with significant spa experiences including Alba and Mornington Peninsula Hot Springs. As the segment grows, it will be important the products remain competitive and world-class.

Nature

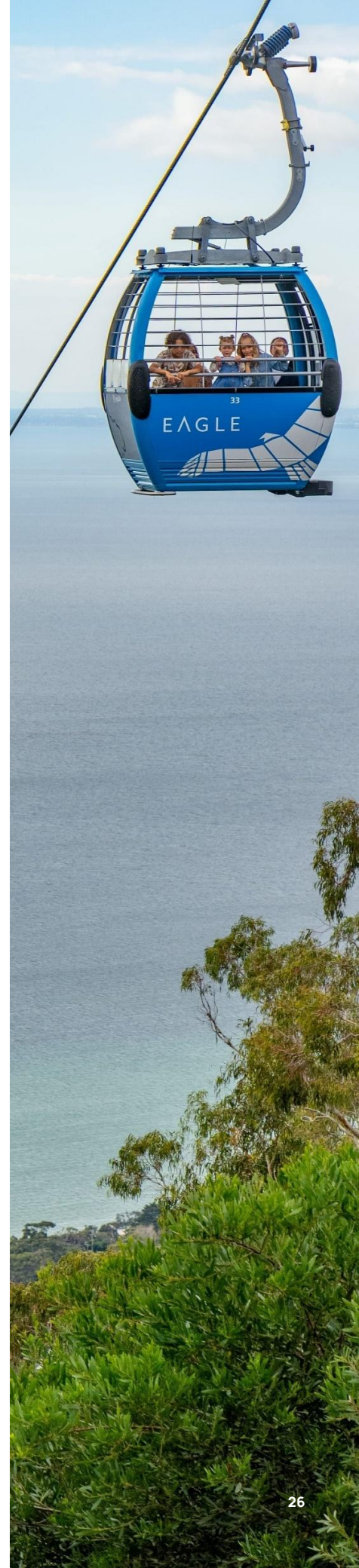
Primary Product Strength

Strong alignment for the Mornington Peninsula with access to the ocean, two bays and the hinterland. Continual focus is needed to ensure natural assets are accessible, safe and protected into the future.

Food & Drink

Primary Product Strength

Strong alignment to the Mornington Peninsula, boasting Chef Hat restaurants, premium wineries and innovative breweries and distilleries.



Destination Victoria Brand Strategy Playbook

This strategy was developed to articulate the strategy behind the brand for each region.

Mornington Peninsula's Masterbrand promise is to enrich event moment with an alluring seaside escape. The Pillars articulate the regions product strengths:

- Nature at your fingertips
- Passion for quality
- Storied culture

Although the proof points reflect that Storied Culture is an emerging pillar with limited product.

Figure 12. Mornington Peninsula Regional Sub-brand Framework

Visitation drivers	Escape my everyday	Surprise and delight me	Spark my imagination
Victorian Masterbrand promise	<p>Enrich every moment with an Alluring seaside escape</p>		
Mornington Peninsula sub-brand promise			
Pillars	<p>Nature at your fingertips</p> <ul style="list-style-type: none"> • Golf destination • Spa and wellbeing • Aquatic activities: on, in and underwater • Coastal walks and beaches 	<p>Passion for quality</p> <ul style="list-style-type: none"> • Premium food and drink experience • Wine region and cellar doors • Artisans • Events and festivals • Attractions 	<p>Storied culture</p> <ul style="list-style-type: none"> • First Peoples cultural experiences • Art galleries and sculpture parks • Post-colonial history
Proof Points	<ul style="list-style-type: none"> • St Andrews Beach Golf Course, RACV Cape Schanck Golf Course, The National Golf Club, Peppers Moonah Links Resort • Peninsula Hot Springs, Alba Thermal Springs & Spa • Beaches: Mount Martha, Blairgowrie, Portsea, Sorrento • Water Activities: Moonraker Dolphin Swim, Polperro Dolphin Swim, Joe Farr Fishing, Victorian Yacht Charters, East Coast Surf School • Bushrangers Bay Trail, Cape Schanck Coastal Walk, Fort Nepean Walk 	<ul style="list-style-type: none"> • Doot Doot Doot, Laura, Max's Restaurant, Intercontinental Sorrento, Portsea Hotel • Montalto, Jackalope, Polperro Winery, Paringa Estate, Port Phillip Estate, Ten Minutes by Tractor • Hawkes Farm, Torello Farm, Mock Red Hill, Sunny Ridge, Red Hill Truffles, St Andrew's Brewery, Bass and Flinders Distillery, Chiefs Son Distillery and JimmyRum • Arthurs Seat Eagle, Moonlit Sanctuary, Enchanted Adventure, Ashcombe Maze and Lavendar Gardens 	<ul style="list-style-type: none"> • McClelland Sculpture Park, Montalto Sculpture Park • Old Quarantine Station
Personality Traits	Open-minded	Creative	Intriguing

Source: Destination Victoria Brand Strategy Playbook 2022

3.3 Influences on the Visitor Economy

At present, there are a range of critical issues impacting Victoria's visitor economy. These have been summarised as they relate to the Mornington Peninsula in this section.

Climate Change

A major driver of visitation to the Mornington Peninsula is its natural landscape, including the coast-line, hinterland and access to the ocean and bays.

The increasing effects of climate change pose a significant threat to tourism businesses within the Mornington Peninsula, particularly with the increasing number of severe storms, sea-level rise and coastal erosion.

In recent years, severe rainfall and storm activity have had major impacts on the Mornington Peninsula and businesses. For the Hinterland, these severe weather events impact the electricity lines and power supply which has flow on effects to the water and sewer for businesses in the region.

Capacity & Congestion

The Mornington Peninsula experiences exceptionally high visitation during the summer and school holiday periods. This leads to severe congestion and strain on services, retail and infrastructure. This is particularly true for townships on the Northern and Southern Peninsula.

A key element to the DMP will be ensuring visitors are dispersed throughout the region to destinations with smaller visitor economies. The strengthening and promotion of different townships across the Mornington Peninsula will be integral to encourage visitor dispersal.

As well as geographically dispersing visitors, encouraging visitors to travel to the region outside of the peak seasons will be key to helping business sustainability throughout the year. Showcasing attractions and experiences available to visitors in the shoulder and off-peak season will be key to attracting and growing this visitation.

Culturally & Linguistically Diverse Market

With 45% of Victorians born overseas, the culturally and linguistically diverse (CALD) market is a key segment for tourism in Victoria. It is important that destinations understand the needs of this market and support growth in this segment.

The CALD market is a key market for the Mornington Peninsula visitor economy and increasingly growing. Whilst these groups are diverse in ethnicity and language, many of these have commonalities in their desire to explore Victoria and passive, nature-based experiences.

It is likely that overtime the low-yielding nature of this market will change as they make connections and grow confidence. This is likely to lead to longer visits and long-term repeat visitation. It will be critical for tourism providers and organisations to understand the needs of this market to adequately support and manage the growth in visitation, as well as maximise yield from visitors in this market.

Seasonality

Due to the seasonal nature of tourism on the Mornington Peninsula, businesses within the tourism industry struggle to make a sustainable livelihood throughout the quieter months.

Positioning the destination as a year-round destination will be key to reduction of severe troughs in visitation will help to support businesses throughout the year.

The product mix on the Mornington Peninsula has developed to support year-round visitation. Further consideration on how to market the region to international and interstate markets will support year-round visitation.

Community Sentiment

Whilst the community understand the value of the visitor economy at a macro level, there is underlying sentiment of the challenges of living in a popular tourism region.

Traffic congestion, limited supplies of groceries and other essentials, pressure on services and general disruption to daily life are experienced.

Mitigation to reduce the impacts of large visitor numbers are the responsibility of government and industry as demand for tourism in the region continues.



Workforce & Housing

The greatest challenge for tourism regions across Australia is the attraction, retention and housing of the visitor economy workforce. For highly seasonal destinations, like the Mornington Peninsula, short-term housing options are limited due to competition amongst the workforce and tourists for housing availability.

Currently the Mornington Peninsula tourism industry makes up 6% of total employment. The implementation of the Mornington Peninsula Visitor Economy Workforce Development Action Plan will be key to addressing key workforce issues in the visitor economy specific to the Mornington Peninsula. The plan provides both practical and innovative solutions to addressing these issues.

Sustainability

Increasing consumer focus on the environment, driving demand for more sustainable tourism opportunities. Visitors are becoming more environmentally conscious and the Mornington Peninsula and there is opportunity to strengthen eco-tourism on the Mornington Peninsula.

Cost of Doing Business & Cost of Living

There are increasing financial pressures on businesses in Victoria's tourism industry, including interest rate rises and the increasing cost of penalty wages and general goods and services costs. In addition to this increased cost of living is also impacting on visitors travel patterns and expenditure.

Accessibility

Accessible tourism is the ongoing effort to ensure that tourist destinations, products, and services are available to all people, regardless of their physical limitations, disabilities, or age.

There are very few businesses and public assets that are delivering to the needs of the accessibility market. Aging of visitors and increased support and social awareness around accessibility will drive demand for destinations that support accessibility.

Government Funding

MPRTB has the lowest funding per visitor of all RTBs in Victoria. This presents challenges in providing services to industry and visitors. In order for future sustainability of the MPRTB, additional funding sources are required.

Government funding is needed throughout the region to support investment in infrastructure to drive tourism. At present, there is a disparity in the funding received by the Mornington Peninsula when compared to other tourism destinations. Over a 10-year period, from 2012 to 2021, Geelong has received a higher level of funding in seven out of ten years resulting in approximately \$50 million more in funding to Geelong and the Bellarine in comparison to Frankston and Mornington Peninsula combined.

Ensuring solutions and projects outlined in the DMP align with the priorities of the state government will be critical to maximise funding opportunities and ensure the document has strategic support.



4. Tourism Governance



4.1 Overview of Governance

The governance structure for the visitor economy in the Mornington Peninsula tourism region is outlined in the adjacent figure.

Regional Tourism Boards (RTB) are independent organisations which were first established in 2008. RTBs set a regional strategic direction and work with industry, Local Government and the State Government to drive tourism in their region.

Local Government plays a crucial role in supporting the visitor economy, particularly in terms of providing the foundations, including community infrastructure, planning, development support, visitor information services, community engagement, and industry development activities to support the local tourism industry.

4.2 Transitioning to a Visitor Economy Partnership

At present, the Victorian Government is in the process of transitioning its regional tourism governance model. The Visitor Economy Recovery and Reform Plan 2021 identified that existing RTBs would transition to become Visitor Economy Partnerships (VEPs). The plan for the Mornington Peninsula VEP is yet to be confirmed.

Throughout this transition phase, it is important that MPRTB provides leadership and stability for the Mornington Peninsula visitor economy. It is important that this DMP continues to be implemented as an industry endorsed document under the future VEP. The new VEP is anticipated to be in place by 1 July 2025.

4.3 Mornington Peninsula Regional Tourism Board

Mornington Peninsula Regional Tourism Board is the RTB for the Mornington Peninsula tourism region, including Mornington Peninsula Shire and Frankston City Councils. MPRTB is a not-for-profit association and is governed by a board which includes industry experts and skilled-based members.

Currently, the board is funded by the State government and industry partnerships. Unlike other RTBs there is no local government funding from the two LGA in the region, Mornington Peninsula Shire Council and Frankston City Council.

The key role of MPRTB is to strengthen the Mornington Peninsula Visitor Economy through industry development, as well as develop marketing initiatives to drive visitation during low and shoulder seasons. MPRTB partners with the Victorian State Government, Visit Victoria and other industry bodies to achieve the best outcomes for the region.

Strengthening and amplifying the Mornington Peninsula brand—through storytelling that reflects the region’s unique landscapes, passionate producers, and vibrant communities—remains a priority as the industry navigate shifts in Victoria’s visitor economy. MPRTB’s current destination marketing leverages the compelling “Explore More” brand, a dynamic approach that showcases the breadth and depth of the region’s diverse offerings and connects with high-value, values-aligned visitors. Through targeted regional marketing campaigns, industry collaboration, and a focus on immersive experiences, MPRTB continue to position the Mornington Peninsula as a must-

visit destination, driving economic and social benefits for our region.

The Explore More brand is a direct call to action for consumers to explore more of the Mornington Peninsula.

Figure 13. Tourism Governance in Mornington Peninsula

National

- Tourism Australia

State

- Visit Victoria
- Parks Victoria
- Department of Jobs, Skills, Industry and Regions (DJSIR)
- Victorian Tourism Industry Council (VTIC)

Regional

- Mornington Peninsula Regional Tourism Board

Local

- Frankston City Council (FCC)
- Mornington Peninsula Shire Council (MPSC)

Please note: A number of industry committees, local tourism associations and chambers of commerce operate within Mornington Peninsula who are responsible for delivering visitor servicing at the local level.



4.4 Future Governance & Financial Sustainability

As stated, at present the MPRTB is solely funded by the Victorian State Government and its industry partners and remains the only RTB in Victoria that receives no funding by the region's principle Local Government (Mornington Peninsula Shire Council), nor the Frankston City Council who it also supports. This situation is unsustainable and limits the region's eligibility for additional tourism funding due to the lack of discretionary funds. It also impacts the stability of the RTB through the VEP transition.

It is important that moving forward a formal partnership is established with the LGAs in the region to provide financial and in-kind support to continue to build a cohesive region. It is not sustainable for the RTB to function without this support and there is duplication and inefficiencies forming.

With the regulatory responsibility for development in Council's, they are in a prime position to funnel businesses, new and growing, to the RTB for industry development, visitor services and visitor attraction.

4.5 Best Practice in Stakeholder Management

Effective stakeholder management is crucial for the success of Mornington Peninsula's tourism industry. Best practices involve identifying all relevant stakeholders and building genuine rapport with them to understand their interests, concerns, challenges and expectations, and actively engaging with them. These stakeholders include tourism businesses, industry bodies (local, state and national), community, local and state government, other connected and supplementary industries and peak bodies including but not limited to Bunurong Land Council Aboriginal Corporation, Parks Victoria, Business Events Victoria and Melbourne Water.

Communication should be transparent, timely, and tailored to the needs of each stakeholder group. MPRTB should continue to build strong relationships through regular updates and networking events, which address concerns proactively helping to maintain trust and alignment with the RTB's goals.

By fostering collaboration and addressing stakeholder needs, MPRTB can enhance outcomes, minimise risks, and achieve more sustainable results with a connected and collaborative industry.



5. Destination Insights





4.1 Overview

The Mornington Peninsula DMP has been developed through the application of best practice principles. A rigorous process of research, in-depth stakeholder engagement, market research and assessment was undertaken to inform the DMP. Stakeholder engagement undertaken as part of the project include:

- 5 sub-region workshops;
- 83 industry survey responses;
- Targeted interviews with stakeholders; and
- 2 local government workshops.

Key challenges and needs identified by stakeholders, as well as priorities, have been summarised in this section.

4.2 Stakeholder Insights

Challenges & Needs

- Severe peaks and troughs in visitation throughout the year, particularly for smaller townships.
- Capacity and congestion issues during peak summer period, particularly on the Southern and Northern Peninsula.
- High visitor periods put strain on public amenity and infrastructure.
- Limited and outdated public infrastructure throughout the region, as well as poorly maintained public land and assets. This does not match the quality of the privately owned products and experiences available in the region.
- Many townships, particularly within the Hinterland, are not connected to mains water supply and sewer, leaving them vulnerable during extreme weather events and limitations on future investment.
- Lack of tracks and trails connecting townships, as well as poorly maintained and signed trails.
- Lack of large-scale, commercial accommodation to support peak season visitation.
- Lack of public transport limiting the mobility of the workforce and visitors. This potentially limits growth of interstate and international markets.
- Lack of First Nations' tourism experiences and products available within the region.



Priorities

- A strength of the region is the high day trip visitation, opportunity for the region to grow overall visitor expenditure through increasing the yield from day trip visitors.
- Improve awareness of destinations with smaller visitor economies to encourage visitor dispersal and ease the strain on busier destinations.
- Ensure the region meets the minimum expectations that visitors have when travelling domestically. This includes access to public transport, informative signage, well maintained visitor amenities and increased contemporary, commercial accommodation stock.
- Improve pedestrian safety and access, including road shoulders and safe pedestrian pathways. Develop connections between townships and key visitor destinations via tracks and trails.
- Attract world-class events to the Mornington Peninsula, as well as develop satellite events for major events occurring in Melbourne and the surrounding region to develop a well-balanced events calendar.
- Attract eco-tourism products and experiences to the region, including eco-accommodation, farm gates and nature-based attractions.
- Continue to strengthen the regions connection to the Golf market and promote the numerous assets within the region.
- Workforce accommodation solutions to support the workforce during peak seasons.
- Opportunity to unlock waterfronts through foreshore activations and water transport.



6. Destination Management Framework



Vision

“ The Mornington Peninsula is Australia's leading premium coastal destination, presenting unparalleled gastronomic, lifestyle and wellness experiences of world class standard. ”

Objectives

1. To **increase geographic dispersal**, with growth in visitation to Hinterland, Western Port, Southern and Northern Peninsula and Frankston sub regions.
2. To **increase visitor yield** through higher spend and increased length of stay.
3. To **enable an unparalleled visitor experience and satisfaction** with visitors enriched by the highest level of service and supporting quality infrastructure.
4. To **increase awareness** of the region as a premium coastal destination, both interstate and internationally to **grow** these segments.

Targets

Increase international visitation from 177,000 visitors in 2023 to 250,000 visitors in 2028.

Increase interstate visitation from 160,000 visitors in 2023 to 300,000 visitors in 2028.

Increase domestic overnight visitor yield from \$554 per person per visit in 2023 to \$650 per person per visit in 2028.

Increase the proportion of visitation to the Hinterland and Western Port from 24% and 6% in 2023 to 28% and 10% in 2028, respectively.

6.2 Strategic Themes

Five strategic themes have been identified for the Mornington Peninsula Destination Management Plan. These are the focus areas that will enable the region to achieve the DMP's vision and objectives to guide the future of the Mornington Peninsula visitor economy.

Priority Projects

Priority projects have been identified under each of the pillars highlighted above. These priority projects will significantly impact the Mornington Peninsula visitor economy, as well as best meet the objectives of the DMP.

Key partners have been identified for each of the priority projects, as well as a priority level identified by determining their level of importance, logical staging, as well as which actions can be achieved relatively quickly. The following priority levels have been used:

- Short-term – within 1 year
- Medium-term – 1-3 years
- Long-term – 4 years or more
- Ongoing

Theme One

Coastal Activation

Improve year-round use and activation of the Mornington Peninsula's coastal assets.

Theme Two

Destination Sustainability

Develop sustainable practices to deliver outcomes that are positive for the environment, economy and community.

Theme Three

Infrastructure & Amenity

Support the growing visitor economy through investment in critical visitor economy infrastructure.

Theme Four

Governance

Work with industry and Local Government to support the growing visitor economy and streamline destination management throughout the region.

Theme Five

Business Development & Support

Ensure the tourism industry is well-connected and supported through networking and implementation of the Workforce Plan.

Theme Six

Destination Marketing

Continue to raise the destination profile and ensure the region is attracting and reaching new and emerging markets.



7. Priority Projects




Theme One

Coastal Activation


Improve year-round use and activation of the Mornington Peninsula's coastal assets.


The coast of the Mornington Peninsula is the region's key tourism asset. There has been substantial investment in hinterland experiences and recreation including food, beverage and golf and wellness facilities over the past 30 years on the Mornington Peninsula. However, there has been little investment coastal experience, products and infrastructure. This theme explores projects which support coastal activation.

7.1 Priority Projects

No.	Priority Project	Key Partners	Priority	Actions to follow
1.1	<p>Coastal Reserves Governance Review</p> <p>There are many entities involved in coastal management across the Mornington Peninsula, leading to inconsistent infrastructure provision, visitor experience and duplication of services. Management organisations include Mornington Peninsula Shire Council, Parks Victoria and Coastal Management Committees. The establishment of an efficient approach to management of coastal areas needs consideration. The Great Ocean Road Coast and Parks Authority presents an example of a coordinated approach to coastal parks management.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • Parks Victoria • Coastal Management Committees 	Medium-term	<ul style="list-style-type: none"> • Undertake a governance review of coastal management on the Mornington Peninsula.
1.2	<p>Long Island Events Precinct Masterplan</p> <p>A masterplan for Long Island is needed to secure a major outdoor events destination for Frankston. It is well located in proximity to Frankston Beach and CBD and would deliver much needed major events location. The precinct needs to consider events infrastructure such as power, toilets, stage location and landscaping to support outdoor events.</p>	<ul style="list-style-type: none"> • FCC 	Medium-term	<ul style="list-style-type: none"> • Undertake a masterplan for Long Island, Frankston.
1.3	<p>Rye Township Plan</p> <p>The Rye Township Plan identifies a range of infrastructure and amenity improvements for Rye township, which acts as one of the key hubs for coastal tourism on the Mornington Peninsula. The plan addresses improvements which will support summer capacity issues, pedestrian safety and overall visitor experience.</p> 	<ul style="list-style-type: none"> • MPSC • MPRTB 	Short-term	<ul style="list-style-type: none"> • Advocate for funding to deliver the Rye Township Plan.

Peninsula Shire Council.

No.	Priority Project	Key Partners	Priority	Actions to follow
1.4	<p>Twilight Engagement Initiative</p> <p>To disperse spend throughout the day and encourage increased length of stay, opportunities should be identified to activate coastal foreshore spaces through twilight engagements, including seasonal pop-ups, music festivals, restaurants, bars. The scale of these activations could vary to leverage scarcity, brag-ability and popularity.</p>	<ul style="list-style-type: none"> • MPRTB • Industry 	Short-term	<ul style="list-style-type: none"> • Fund and develop a program to activate coastal spaces and encourage twilight/night-time events that convert daytrip visitors to overnight visitors.
1.5	<p>Foreshore Activation Project</p> <p>There are many coastal locations across the Mornington Peninsula that have little beachfront activation in the way of commercial business. This includes businesses such as water sports equipment hire, cafes, kiosks, restaurants and bars. Whilst investing in substantial bricks and mortar facilities is costly and time consuming, there is opportunity to establish locations suitable for pop-up facilities to service the peak visitor population.</p>	<ul style="list-style-type: none"> • MPRTB • Industry 	Short-term	<ul style="list-style-type: none"> • Identify sites across coastal locations suited to pop up coastal activation and undertake EOI.
				
	Source: Seabreeze.com.			
1.6	<p>Point Nepean National Park Masterplan</p> <p>The Point Nepean Masterplan was prepared in 2017 and provides a range of experience, product and infrastructure investments to create an improved visitor destination. Key elements to the masterplan include interpretation upgrades, first nations experiences, trail upgrades, parking improvements and new jetty.</p>	<ul style="list-style-type: none"> • Parks Victoria • MPRTB 	Short-term	<ul style="list-style-type: none"> • Advocate for delivery of Point Nepean Masterplan.

No.	Priority Project	Key Partners	Priority	Actions to follow
1.7	<p>Coastal Spaces Infrastructure Program</p> <p>Recent visitor research on the Mornington Peninsula, as well as feedback from the community, highlights dissatisfaction with coastal destination infrastructure. This includes ageing toilets facilities, poor car parking provision, dated signage, lack of shower and changing facilities, defined and accessible walking paths, and a lack of picnic and BBQ amenities.</p> <p>There is a need to undertake a review of amenity and infrastructure at popular coastal reserves to meet peak capacity requirements and improve visitor experience. Additionally, implementation of new standardised infrastructure is needed.</p> 	<ul style="list-style-type: none"> • MPRTB • MPSC • Parks Victoria • Coastal Management Committees • Industry 	Short-term	<ul style="list-style-type: none"> • Audit public amenities across the Mornington Peninsula Foreshore Reserves and establish a baseline for amenities to be met. Prioritise investment and seek funding.
1.8	<p>Sustainable Beachside Camping Review</p> <p>There is an extensive amount of foreshore camping that occurs in the peak summer period throughout the Mornington Peninsula. These sites provide low-cost camping opportunities on Victoria's beaches for visitors. Issues associated with this include:</p> <ul style="list-style-type: none"> • Amenity – unsightly use of public land in pristine areas of the peninsula. • Accessibility – foreshore public land use being restricted to campers in large parts of the foreshore limiting recreational use for residents and visitors. • Over visitation in peak period – Southern Peninsula is at capacity during the peak summer period. Foreshore camping increases the number of visitors at this time. 	<ul style="list-style-type: none"> • MPRTB • MPSC • Parks Victoria • Coastal Management Committees • Industry 	Short-term	<ul style="list-style-type: none"> • Undertake a review of beachside camping on public land in order to deliver a sustainable approach to foreshore usage and to assess the availability of accommodation options.

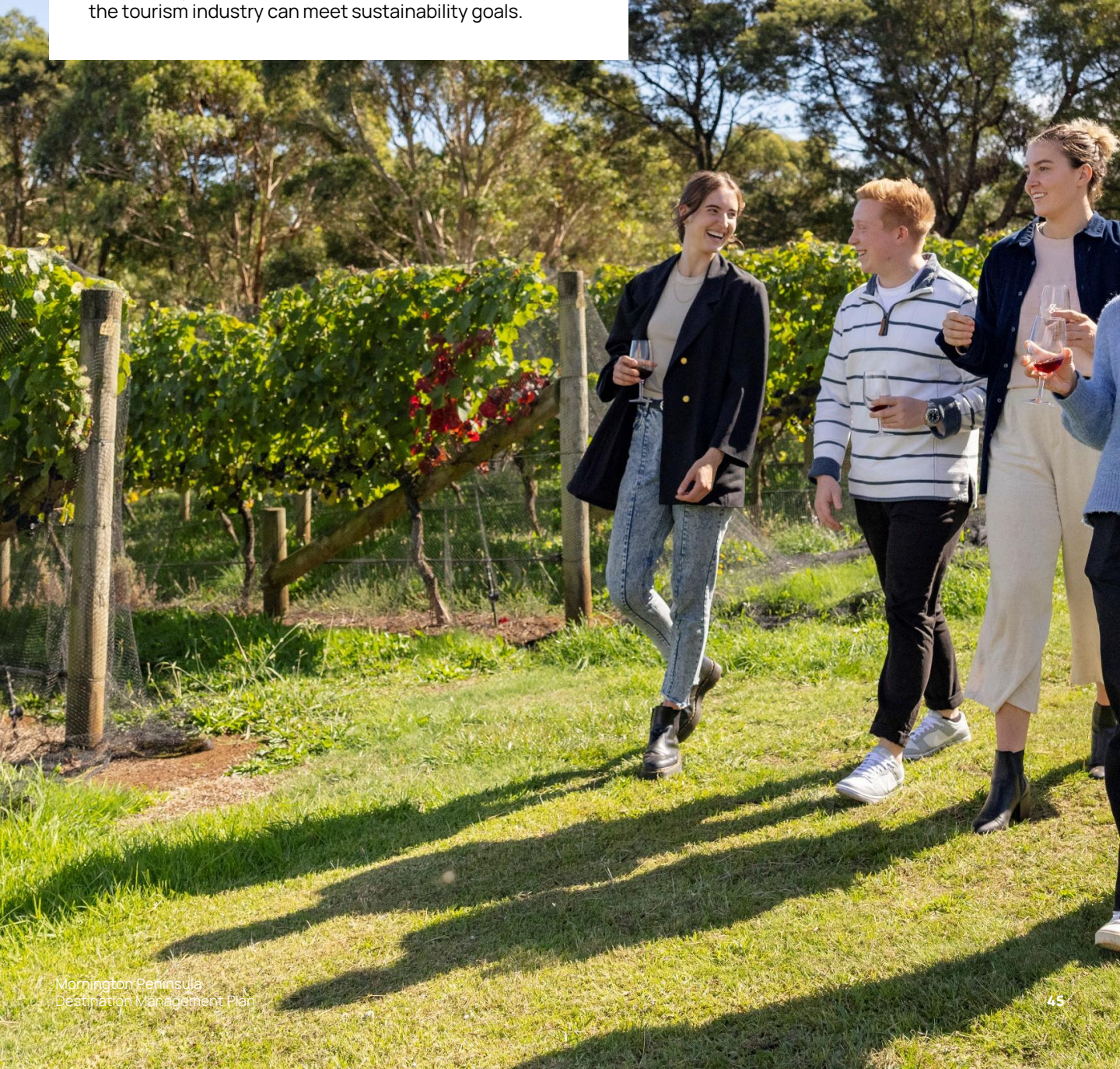
Source: The Dunes at Ocean Grove Foreshore

Theme Two

Destination Sustainability

Develop sustainable practices to deliver outcomes that are positive for the environment, economy and community.

Community and industry on the Mornington Peninsula have a deep interest in sustainability. The Mornington Peninsula is part of an internationally recognised biosphere where one of the primary objectives is creating a sustainable balance between the goals of conserving biological diversity, promoting economic development, and maintaining associated cultural values. The DMP will need to align with these values and consider ways that the tourism industry can meet sustainability goals.



7.2 Priority Projects

No.	Priority Project	Key Partners	Priority	Actions to follow
2.1	<p>Western Port & French Island Eco Tourism Masterplan</p> <p>Western Port and French Island are part of a UNESCO biosphere reserve. One of the primary objectives is to achieve a sustainable balance between the goals of conserving biological diversity, promoting economic development, and maintaining associated cultural values.</p> <p>Western Port and French Island are key conservation areas within the Biosphere and present eco-tourism opportunities for exploration. An eco-tourism plan should be developed for Western Port and French Island to identify opportunities for visitor experience that link Stony Point, French Island and Phillip Island. This could be developed into a new experience that can drive visitation in international markets.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • MP Biosphere 	Medium-term	<ul style="list-style-type: none"> • Undertake an eco-tourism masterplan to identify and drive investment and activation in Western Port and French Island.
2.2	<p>Seasonal Dispersal Plan</p> <p>Create a seasonal dispersal plan that addresses peak periods and low season strategically. Taking into consideration wayfinding, alternate routes, elevating and enhancing lesser-known attractions to reroute visitors, operating hours and transport links. Industry involvement in the development and implementation of this plan would be crucial to its success.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC 	Short-term	<ul style="list-style-type: none"> • Undertake a dispersal plan with tourism partners including strategies to convert day trip visitors to overnight visitors.
2.3	<p>Business Sustainability Advisory Program</p> <p>Develop an advisory program that provides access to business experts financial, environmental, marketing, building etc. MPRTB partners would be granted access this program at a reduced or no cost.</p>	<ul style="list-style-type: none"> • MPRTB 	Long-term	<ul style="list-style-type: none"> • Establish a business mentoring program to encourage sustainable development and growth.
2.4	<p>Target key events to encourage seasonal dispersal</p> <p>Use events to encourage visitation in the off-peak shoulder seasons and encourage dispersal. Target events that appeal to new and emerging markets such as the CALD community and metrotechs. This includes business events that could contribute to dispersal and address mid-week vacancies.</p>	<ul style="list-style-type: none"> • MPRTB 	Short-term	<ul style="list-style-type: none"> • Work with industry to develop industry led events that speak to new and emerging markets



No.	Priority Project	Key Partners	Priority	Actions to follow
2.5	<p>Environmentally Aware Destination</p> <p>Encourage and facilitate businesses to seek Eco certification with Eco Tourism Australia. Strongly advocate for reduction in carbon footprint for visitors by encouraging offsets through a simple online platform and lobby Council for an increase in strategically located EV charging stations.</p>	<ul style="list-style-type: none"> • MPRTB 	Medium-term	<ul style="list-style-type: none"> • Educate and promote eco-tourism certification to operators. • Map existing EV charging stations and advocate to Council for an increase in strategically located EV charging stations.
2.6	<p>Interstate & International Market Development</p> <p>To strengthen seasonal dispersal and build mid-week visitation to the Mornington Peninsula, the international and interstate markets present as an opportunity. These markets are likely to stay longer and spend more at a time when there is availability of accommodation and accessibility to attractions.</p>	<ul style="list-style-type: none"> • MPRTB • Visit Victoria • Tourism Australia 	Medium-term	<ul style="list-style-type: none"> • Develop an interstate and international marketing plan and strengthen industry knowledge and participation in wholesale tourism markets.

Theme Three

Infrastructure & Amenity

Support the growing visitor economy through investment in critical visitor economy infrastructure.

There has been substantial investment in new products and experiences by the private sector on the Mornington Peninsula. This includes wineries, restaurants, quality accommodation, spa and wellness, breweries and distilleries. Investment in public infrastructure however has not kept pace with this investment and the increasing visitation to the Mornington Peninsula. There is a need for the public sector to deliver infrastructure that will support businesses, visitors and the community.



No.	Priority Project	Key Partners	Priority	Actions to follow
3.4	<p>Red Hill Mountain Bike Masterplan</p> <p>Red Hill Mountain Bike Park is a popular ride destination for locals and visitors. The vertical of Red Hill suits downhill and enduro style mountain biking and has been organically been developed over years. The current trail network requires improved structure and planning. A trail masterplan is needed to enhance the network and deliver to market need.</p>	<ul style="list-style-type: none"> • Parks Victoria 	Medium-term	<ul style="list-style-type: none"> • Undertake a holistic mtn bike trail and experience plan for Red Hill.
3.5	<p>Road & Gravel Cycling Masterplan</p> <p>The Mornington Peninsula is a major road cycling destination, with one of the highest concentration of road cycling for any Local Government in Victoria. Safety is a key concern of cyclists when using roads. Road shoulders, safety signage and bike lanes need to be considered as solutions for popular cycling routes.</p>	<ul style="list-style-type: none"> • MPSC • FCC • Department of Transport (Vic Roads) 	Long-term	<ul style="list-style-type: none"> • Prepare a road and gravel cycling masterplan.
3.6	<p>Promote Accessible Tourism Experiences</p> <p>Increase awareness of accessible experience, including beach wheelchair access at Point Leo and Mt Martha. Encourage the development of more integrated, accessible experiences across the sector and seasons for public and private attractions.</p>	<ul style="list-style-type: none"> • Parks Victoria • MPSC • MPRTB 	Short-term	<ul style="list-style-type: none"> • Educate businesses of the importance of accessible tourism
3.7	<p>Hinterland Small Villages Placemaking</p> <p>The Mornington Peninsula Hinterland includes a number of settlements and villages that are dispersed. These settlements have developed into destinations in their own right and have attracted new tourism businesses and increased visitation. The increased visitation and business development of these settlements requires improvements to pedestrian safety, parking and landscaping. A placemaking and urban design framework for the hinterland villages is needed.</p>	<ul style="list-style-type: none"> • MPSC 	Short-term	<ul style="list-style-type: none"> • Undertake a Hinterland Villages Placemaking Masterplan.

No.	Priority Project	Key Partners	Priority	Actions to follow
3.8	<p>Rideshare Collective</p> <p>Partner with a rideshare provider to address the lack of transport options in the region and promote safe movement. Deliver forums on rideshare as an alternate source of income for locals.</p>	<ul style="list-style-type: none"> • MPRTB 	Short-term	<ul style="list-style-type: none"> • Partner with a rideshare provider to deliver local forums on the benefits of rideshare as a business.
3.9	<p>Wayfinding Audit & Renewal Program</p> <p>Undertake a wayfinding and signage audit of the region alongside developing a program for signage renewal and replacement. A clear process of signage application should be developed at the completion of the audit to ensure that there is an ongoing, consistent approach to new signage.</p>	<ul style="list-style-type: none"> • MPRTB • DJSIR • MPSC • Department of Transport (Vic Roads) 	Short-term	<ul style="list-style-type: none"> • Conduct a wayfinding audit and renewal program.
3.10	<p>Stony Point to Phillip Island Car Ferry</p> <p>Support the introduction of a car ferry from Stony Point to Phillip Island to unlock tourism opportunities for the Mornington Peninsula. Additionally, this will link Victoria's major tourism product, Phillip Island Nature Park and the Great Ocean Road, via the Mornington Peninsula and encourage increased length of stay.</p>	<ul style="list-style-type: none"> • MPRTB • SeaRoad Ferries 	Medium-term	<ul style="list-style-type: none"> • Revisit and deliver a new business case that focuses on the value of increasing the length of stay and in turn spend in the region.
3.11	<p>Coastal Passenger Ferry Service</p> <p>Investigate through a feasibility study the opportunity to provide a seasonal passenger ferry between Rye and Sorrento (and beyond if infrastructure allows). Consider this project as a commercial venture to reduce congestion, encourage dispersal and provide a water-based visitor experience.</p>	<ul style="list-style-type: none"> • MPRTB 	Short-term	<ul style="list-style-type: none"> • Government partners to conduct a feasibility study and undertake an EOI for a coastal passenger ferry to operate in peak periods.
3.12	<p>First Nations Acknowledgement</p> <p>There is currently limited First Nations product and information shared with visitors on the Mornington Peninsula. Acknowledging the Bunurong people who may self-determine what role they wish to play in tourism and the type of experiences that are developed.</p>	<ul style="list-style-type: none"> • MPRTB • Bunurong Land Council Aboriginal Corporation 	Short-term	<ul style="list-style-type: none"> • Partner with the Bunurong people to create a Cultural Heritage Interpretation Plan.
3.13	<p>Accommodation Assessment</p> <p>There has been no strategic assessment of accommodation supply and demand on the Mornington Peninsula. To attract investment in quality, contemporary and experiential accommodation, further research is needed to identify gaps in provision and key targets for investment.</p>	<ul style="list-style-type: none"> • MPRTB 	Medium-term	<ul style="list-style-type: none"> • Undertake and accommodation assessment to identify gaps and opportunities for investment and development.



Theme Four Governance

Work with industry and Local Government to support the growing visitor economy and streamline destination management throughout the region.

Governance of the tourism industry on the Mornington Peninsula is a critical consideration for delivery of the Destination Management Plan. Ensuring that there is efficiency in use of resources and service delivery is key to a cohesive approach to industry development and visitor experience.

7.4 Priority Projects

No.	Priority Project	Key Partners	Priority	Actions to follow
4.1	<p>Mornington Peninsula Tourism Governance Review</p> <p>Undertake a review to clearly outline the roles and responsibilities of tourism bodies, including MPRTB, Frankston City and Mornington Peninsula Shire Council and identify productive ways to improve efficiencies. This includes working with State Government to implement the new VEP with consideration of current tourism organisations in the region.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • FCC • DJSIR 	Short-term	<ul style="list-style-type: none"> • Review the current Governance structure for tourism to ensure a well-funded and consistent approach to tourism service delivery. This includes a long terms funding agreement with Local Government partners.
4.2	<p>Coastal Governance Review</p> <p>The Mornington Peninsula has many agencies, committees and organisations that are responsible for governing coastal areas. The current approach lacks efficiency and duplicates resources across the many coastal destinations on the Mornington Peninsula. A review of coastal management is needed to improve the quality of delivery with a visitor centric lens and to ensure a consistent approach is achieved.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • Parks Victoria 	Short-term	<ul style="list-style-type: none"> • Review the current Governance structure for tourism to ensure a well-funded and cohesive approach to tourism service delivery.
4.3	<p>Visitor Services Governance</p> <p>The Mornington Peninsula Visitor Services Strategy identifies a revised approach to visitor services governance to achieve quality and consistency across the Mornington Peninsula. The multiple agency approach including Local Tourism Associations (LTA), Council and MPRTB with no oversight is leading to confused messaging and inconsistent delivery. To achieve a consistent approach to brand reinforcement, dispersal, yield generation and messaging a strong management structure is needed.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • LTAs 	Short-term	<ul style="list-style-type: none"> • Deliver on the outcomes of the visitor services strategy including governance recommendations.

Theme Five

Business Development & Support

Ensure the tourism industry is well-connected and supported through networking and implementation of the Workforce Plan.

There are over 4000 tourism businesses on the Mornington Peninsula, making it the largest tourism industry of any region in Victoria. It is critical that industry are supported to grow and deliver services that meet the needs of contemporary markets and provide exceptional visitor experience.



7.5 Priority Projects

No.	Priority Project	Key Partners	Priority	Actions to follow
5.1	<p>Delivery of the Mornington Peninsula Visitor Economy Workforce Plan</p> <p>Prioritise and deliver actions within the Mornington Peninsula Visitor Economy Workforce Plan to address workforce and worker housing challenges within the region.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC 	Short-term	<ul style="list-style-type: none"> • Prioritise actions from the Mornington Peninsula Visitor Economy Workforce Plan and deliver 3 actions over the next 5 years to generate a sustainable workforce.
5.2	<p>Digital Training Program</p> <p>There is a need to deliver a Digital Training Program to improve the content and online presence of businesses and operators, as well as educating operators on the value of online presence and active use of social media.</p>	<ul style="list-style-type: none"> • MPRTB 	Short-term	<ul style="list-style-type: none"> • Lead a Digital Training Program leveraging existing programs offered by Industry bodies and education institutions to educate business.
5.3	<p>Product Packaging & International Readiness</p> <p>Provide training and support on product packaging encouraging multiple businesses to partner to provide new visitor experiences. Packaging can increase spend, dispersal and length of stay. International ready businesses are an opportunity to attract a new audience to the region. MPRTB can support businesses to become internationally ready in the wholesale market to attend sales events such as Australian Tourism Exchange and G'day Australia to speak directly to buyers. This not only elevates the product offering and increases sales but also raises awareness of the broader region.</p>	<ul style="list-style-type: none"> • MPRTB • Visit Victoria • Tourism Australia 	Medium term	<ul style="list-style-type: none"> • Deliver targeted training and education for businesses.
5.4	<p>Tourism Ambassador Program (B2B)</p> <p>Develop an online training module to demonstrate the value of referral business and instruct businesses how to refer. Certify the businesses for participation in the program and measure the results of the referrals to demonstrate value and grow the program.</p>	<ul style="list-style-type: none"> • MPRTB 	Medium-term	<ul style="list-style-type: none"> • Design and deliver a Mornington Peninsula Tourism ambassador program.
5.5	<p>Business Concierge Service</p> <p>Provide a dedicated business concierge service to businesses to aid them to navigate the planning requirements of establishing their business. This role would be economic development based and be able to closely guide a business through the process of permit requirements.</p>	<ul style="list-style-type: none"> • MPSC 	Short-term	<ul style="list-style-type: none"> • Develop a concierge role at Council that guides businesses through the regulatory process.



No.	Priority Project	Key Partners	Priority	Actions to follow
5.6	<p>Green Wedge Planning Review</p> <p>Whilst the Green Wedge has been effective in maintaining the Mornington Peninsula's rural hinterland, it has presented significant barriers to accommodating tourism investment. A review of the Green Wedge Planning Controls are needed to reflect contemporary tourism products and experiences.</p>	<ul style="list-style-type: none"> • MPSC 	Medium-term	<ul style="list-style-type: none"> • Advocate for State Government to review Mornington Peninsula's Green Wedge planning controls to anticipate contemporary tourism practice.
5.7	<p>Work with businesses to develop agri-tourism experiences and accommodation</p> <p>Deliver an incubator program for the development of high quality, viable agri-tourism experiences. This program will lead businesses through the establishment of their product leveraging the Mornington Peninsula Produce brand and creating bookable visitor experiences and experiential accommodation such as farm stays.</p>	<ul style="list-style-type: none"> • MPRTB • MPSC • FCC 	Medium-term	<ul style="list-style-type: none"> • Work with businesses to co-design a program that will establish a compliant, bookable product.
5.8	<p>Support private sector developments and projects</p> <p>MPRTB will support private sector projects that align with the region's product strengths and deliver on the desire to increase spend, dispersal and length of stay. For example, recent recipients of the State Government's Enabling Tourism Fund - Green Olive At Red Hill, The Ranch Mornington Peninsula and Peninsula Hot Springs.</p>	<ul style="list-style-type: none"> • MPRTB • Industry 	Ongoing	<ul style="list-style-type: none"> • Ensure industry is aware of MPRTB and meet with developers and investors seeking to establish tourism businesses in the region.

Theme Six

Destination Marketing

Continue to raise the destination profile and ensure the region is attracting and reaching new and emerging markets.

As a leading Victorian destination, the Mornington Peninsula can capitalise on this success and continue to reach new and emerging markets through strategic marketing partnerships.



7.5 Priority Projects

No.	Priority Project	Key Partners	Priority	Actions to follow
6.1	<p>Align with the Victorian Golf Tourism Strategy</p> <p>The State's Golf Strategy aims to disperse visitors from Melbourne to the Mornington Peninsula. Work with Visit Victoria to ensure the marketing is consistent and encourage Golf Courses in the region to work on packaging options and collaborations with complementary businesses.</p>	<ul style="list-style-type: none"> • MPRTB • Visit Victoria 	Short-term	<ul style="list-style-type: none"> • Work with the Golf Courses to develop packages that encourage increased length of stay with the aim to convert day visitors to overnight visitors.
6.2	<p>Target new and emerging markets</p> <p>Engage with industry to identify products and experiences that align with new and emerging markets such as the CALD community, international FITs, metrotech, interstate. Work with Visit Victoria to deliver marketing activities to speak directly to these markets through targeted communications.</p>	<ul style="list-style-type: none"> • MPRTB • Visit Victoria 	Short-term	<ul style="list-style-type: none"> • Identify relevant industry participants and work with Visit Victoria to undertake targeted marketing initiatives. • Develop domestic and international marketing plans.
6.3	<p>Consistent inclusion in State and National marketing campaigns</p> <p>MPRTB is a conduit to State and National marketing opportunities. Industry education is required around the value of involvement with the RTB and the funding framework linked to delivering programs.</p>	<ul style="list-style-type: none"> • MPRTB • Visit Victoria • Tourism Australia 	Medium-term	<ul style="list-style-type: none"> • Create an accessible communication i.e. video or fact sheet that explains to industry the value of regional investment in the RTB.
6.4	<p>Conduct a brand review</p> <p>Conduct a regional brand review, leveraging Visit Victoria's 'Every Bit Different' campaign, to refine positioning, strengthen market appeal, and align with visitor expectations. This process will include stakeholder consultation, market research, and strategic brand development to enhance regional identity and competitiveness.</p>	<ul style="list-style-type: none"> • MPRTB • Industry 	Medium-term	<ul style="list-style-type: none"> • Work with industry to review the current regional brand and develop an implementation that is closely aligned to the existing operational budget and proposed funding opportunities.
6.5	<p>Targeted Destination Marketing</p> <p>Implement strategic demand-driving activations and an integrated media approach (owned, earned, and paid) to enhance destination appeal, attract visitors, and support local economic growth. This includes attracting signature events, leveraging digital and traditional media campaigns, and fostering partnerships to amplify reach and engagement.</p>	<ul style="list-style-type: none"> • MPRTB • Industry 	Ongoing	<ul style="list-style-type: none"> • Develop a Destination Marketing Plan which has an annual tactical action plan to be delivered.



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