



# VISITOR INSIGHTS 2016



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*Note: This report presents key statistics and information about the number and type of visitors to Surf Coast Shire in 2015/16. Previous years' data has also been presented in some cases to enable a longer term trend to be considered.*



# PURPOSE OF REPORT

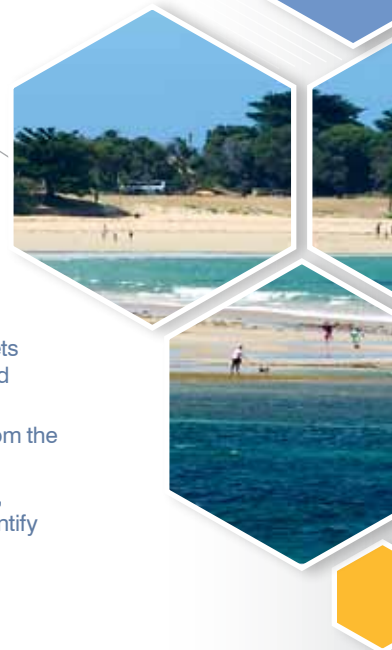
This report presents key statistics and information about the number and type of visitors to Surf Coast Shire in 2015/16. Previous years' data has also been presented in some cases to enable a longer term trend to be considered.

Surf Coast Shire Visitor Insights benchmarks the areas of Surf Coast Shire, Lorne - Anglesea and Torquay's performance in comparison to other regional destinations in Victoria and N.S.W.

Data is provided by Tourism Research Australia, a branch of Austrade. Tourism Research Australia is Australia's leading provider of quality tourism intelligence across both international and domestic markets and provides statistics, research and analysis to support industry development, policy development and marketing for the Australian tourism industry.

Data will change every year as provided by Tourism Research Australia. Data has also been sourced from the Australian Bureau of Statistics (ABS).

This publication can be used to provide information to businesses to assist in the development of plans, the community, investors and developers on the current tourism capacity in Surf Coast Shire and to identify opportunities for investment in the municipality.



## SURF COAST DATA REGIONS

Statistics presented in this document are based on areas determined as Statistical Area Level 2 (SA2) and Statistical Area Level 3 (SA3), by Australian Statistical Geography Standards (ASGS). SA2s and SA3's are the geographical areas utilised by Tourism Research Australia as well as ABS.

The ASGS brings all the regions for which the ABS publishes statistics to one framework and is used for the collection and dissemination of geographically classified statistics. It provides a common framework of statistical geography and enables the production of statistics which are comparable.

Specific data sets used include:

- Torquay (SA2)
- Winchelsea (SA2)
- Lorne - Anglesea (SA2)
- Western (SA3)

- **Due to changes to the National Visitor Survey (NVS) methodology (to include mobile phone interviewing and new estimated resident population projections from January 2014), care should be taken when comparing year ending September 2014 survey results with those from previous years. These changes represent a break in the time series.**
- From 2014, the NVS has moved to a dual frame sample methodology. This means one portion of the sample is now interviewed on residential fixed-lines and another on mobile phones.
- Tourism Research Australia started using the Australian Bureau of Statistics' new projections of estimated resident population (ERP) from March quarter 2014.
- The ERP projections for those aged 15 years or more are used as an input to the NVS weighting. Therefore, changes to ERP projections will impact NVS results from 2014 onwards.

For more information on the methodology changes please go to [www.tra.gov.au](http://www.tra.gov.au) / News & Media / Fact-sheet-2014-Updates-to-the-IVS/NVS

## MAP OF TORQUAY, LORNE - ANGLESEA, WINCHELSEA (SA2 AREAS)



# SURF COAST SHIRE: TOURISM ENGINE ROOM OF THE GREAT OCEAN ROAD

The Surf Coast Shire, with its beaches, National Parks and rural environment, is located in south-western Victoria, 1.5 hours from Melbourne's CBD and 20 minutes south of Geelong's CBD. With its rich agricultural and aesthetic attributes, the hinterland is increasingly contributing to the shire's economic development, particularly via local food and niche tourism opportunities.

Worth over \$1 billion annually, Surf Coast Shire's economy continues to experience strong growth. As a distinctly different economy to that of Geelong and surrounding regions, with the tourism and surfing sectors playing a key role. Surfing represents almost 27% of all jobs (more than 2,000) and 26.6% of all value add activity. Strong population growth will see a need to create approximately 3,000 additional jobs by 2031 in a shire where some 87 per cent of all businesses employ four or less people.

Tourism also plays a vital role, with more than 2.1 million visitors directly expending over \$430m during 2015/16. It is estimated that over \$42 million in wages and salaries is attributed to tourism in Surf Coast each year. After factoring in all other forms of indirect expenditure, over \$683 million were injected by tourism into the local economy. In terms of value add activity the Tourism sector contributes over \$90 million annually to Surf Coast Shire while accounting for 15.2% of total employment (Surf Coast's largest employment sector).

**Surf Coast Shire is home to nine distinct townships: Aireys Inlet, Anglesea, Deans Marsh, Fairhaven, Jan Juc, Lorne, Moriac, Torquay and Winchelsea. These townships and the rural hinterland support over 3,000 businesses which drive an economy estimated to be over \$1 billion annually.**





# SUMMARY OF TOTAL VISITATION TO SURF COAST

The Surf Coast region received an estimated 2.1 million total visitors to the financial year ending June 2016 (Table 1). The region received over 2.3 million overnight visitor nights during the same period with a direct expenditure of \$432 million. Annual visitation to Surf Coast Shire contributes \$683 million to the local economy.

Domestic overnight visitors stayed 3 nights on average, and spent the most money per day (\$134). International visitors by comparison stayed 2.1 nights on average and spent \$92 per day. Domestic Overnight Visitors also generated the most direct expenditure (\$299.7 million), followed by Domestic Day-Trippers (\$124.5 million) and International Visitors (\$8.2 million).

## SURF COAST WELCOMED OVER 2.1 MILLION VISITORS WHO CONTRIBUTED A TOTAL OF OVER \$683 MILLION TO THE ECONOMY IN 2015/16.

Surf Coast Visitor Type	Visitor Numbers	Visitor Nights	Average Visitor Nights	Average Expenditure Per Day*	Visitor Impact (\$) Direct	Total Visitor Impact (Direct & Indirect)
Domestic Day Visitors	1,339,000	NA	NA	\$93	\$124,527,000	\$221,658,060
Domestic Overnight Visitors	780,000	2,237,000	3.0 ave	\$134	\$299,758,000	\$449,637,000
International Visitors	42,052	90,014	2.1 ave	\$92	\$8,281,288	\$12,421,932
<b>Total</b>	<b>2,161,052</b>	<b>2,327,014</b>			<b>\$432,566,288</b>	<b>\$683,716,992</b>

Table 1: Summary of Surf Coast Visitor Data

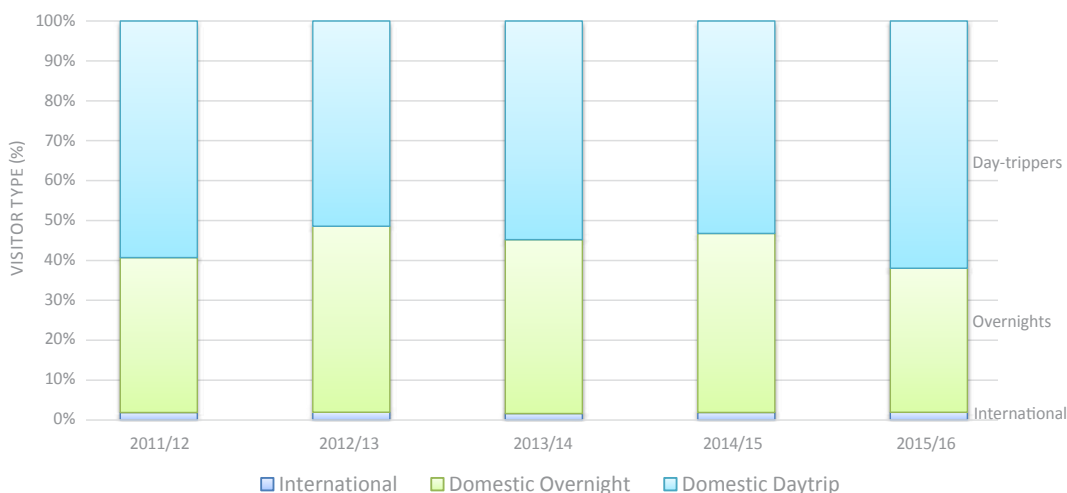
\*Source: Western Region & Surf Coast Data, Regional Expenditure, December 2016, Tourism Research Australia.

## TOTAL VISITATION AND VISITOR NIGHTS

### TOTAL VISITATION AND VISITOR NIGHTS- 5 YEAR TREND

Figure 1 shows that the 61.9% of all visitors to the Surf Coast were day visitors, followed by overnight visitors (36.1%) and international visitors (1.9%).

#### VISITOR TYPES

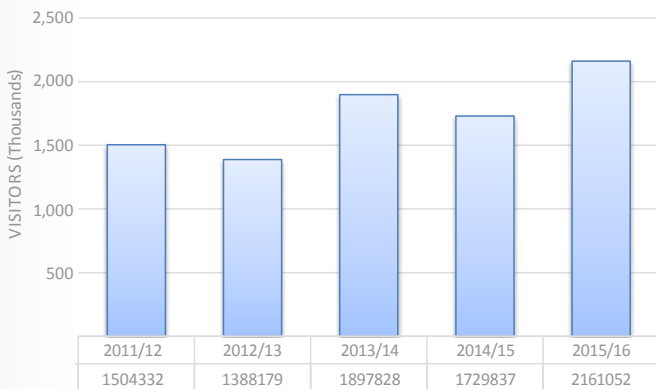


MORE THAN HALF OF ALL VISITORS ARE DAY TRIPPERS

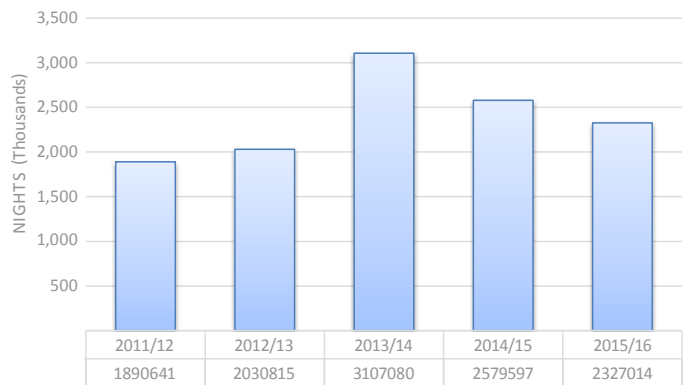


# TOTAL VISITATION AND VISITOR NIGHTS – 5 YEAR TREND

## TOTAL VISITATION 2011/12 TO 2015/16



## TOTAL VISITOR NIGHTS 2011/12 TO 2015/16



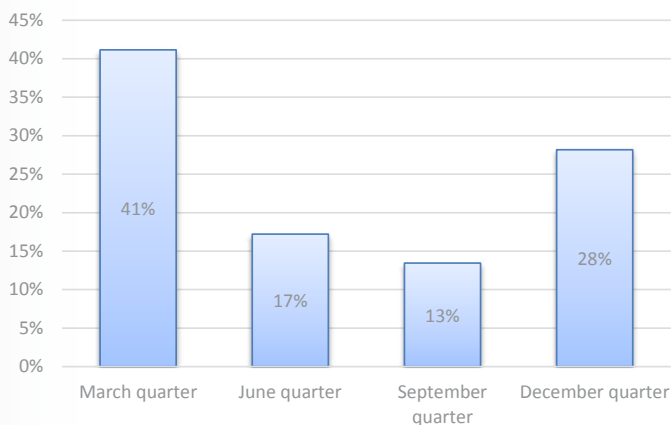
In 2015/16, the total visitation to the Surf Coast was 2,161,052 people which is the highest level of visitation in the past five years. There has been an average annual growth of 7.5% during this period.

Since 2011/12, the average annual growth rate in visitor nights is 4.2%. While total visitation has been growing, this has been driven by an increased number of day-trippers. The total number of overnight visitors has decreased. These visitors are now spending less per day than in previous years, and are staying for less time. This has resulted in lower yield in the sector.

# SURF COAST VISITATION BY QUARTER

The March quarter (Summer) was the most popular time for visitors with 41% of visitation, generating the most visitor nights. The second most popular quarter was December (Spring) at 28%. The June quarter shows a 10% increase in total visitation in 2015/16, and a 3.9% increase in visitor nights compared to a five year average. The September quarter had a 14% decline in visitor nights compared to the five year average.

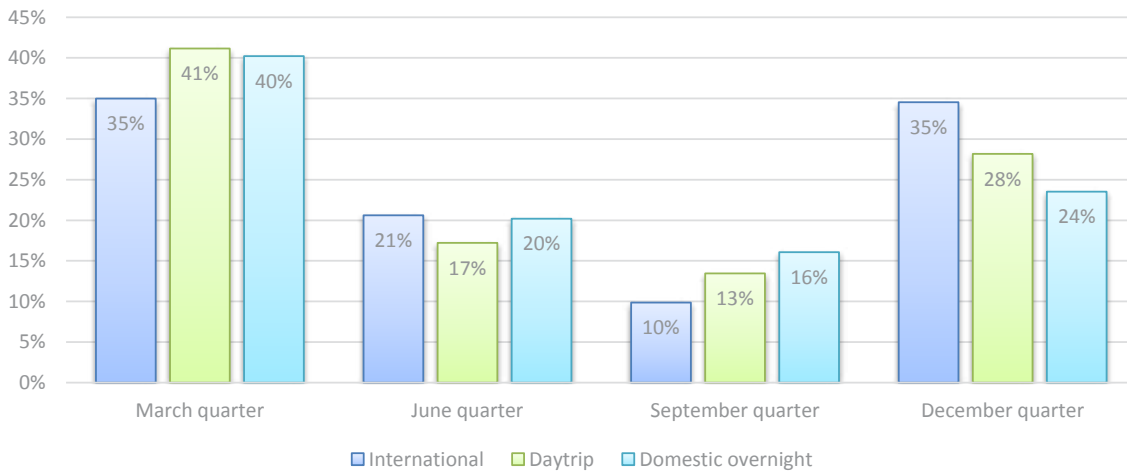
## DAY TRIPS PER QUARTER - 4 YEAR AVERAGE



SUMMER AND SPRING ARE THE MOST POPULAR TIMES TO VISIT



## VISITOR TYPE PER QUARTER

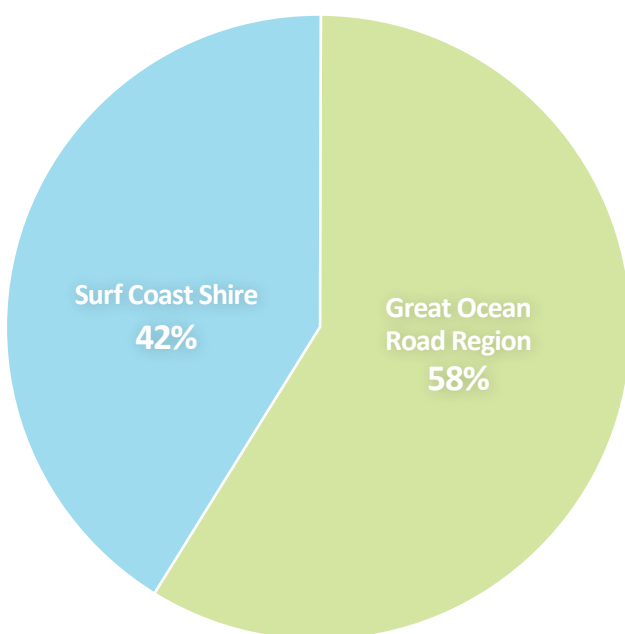


## SURF COAST MARKET SHARE OF GREAT OCEAN ROAD VISITATION

Over 5.1 million visitors visited the Great Ocean Road region with the Surf Coast Shire welcoming over 2 million of those visitors.

	Great Ocean Road	Surf Coast Region
Domestic Day Visitors	2,989,362	1,339,000
Domestic Overnight Visitors	1,934,896	780,000
International Visitors	206,009	42,052
<b>Total</b>	<b>5,130,266</b>	<b>2,161,052</b>

## SURF COAST MARKET SHARE %



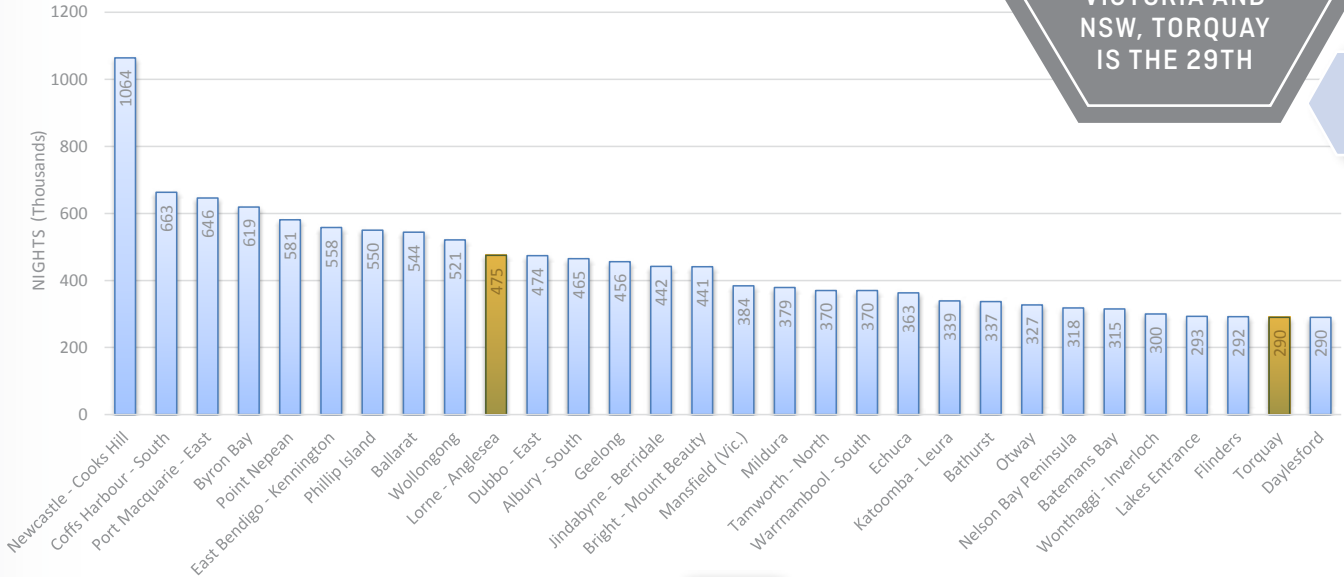
THE SURF COAST RECEIVES 42% OF THE 5.1 MILLION VISITORS TO THE GREAT OCEAN ROAD REGION

The Surf Coast receives 42% of all visitors to the Great Ocean Road - 40% of all domestic overnight and 45% of all day visitors. Only 20% of total international visitors come to the Surf Coast.

## TOP REGIONAL DESTINATIONS

Both Lorne and Torquay are in the top 30 regional destinations for Victoria and New South Wales combined for overnight visitors.

## TOP 30 REGIONAL OVERNIGHT DESTINATIONS IN VIC/NSW



LORNE-ANGLESEA IS THE 10TH MOST VISITED REGIONAL DESTINATION IN VICTORIA AND NSW, TORQUAY IS THE 29TH

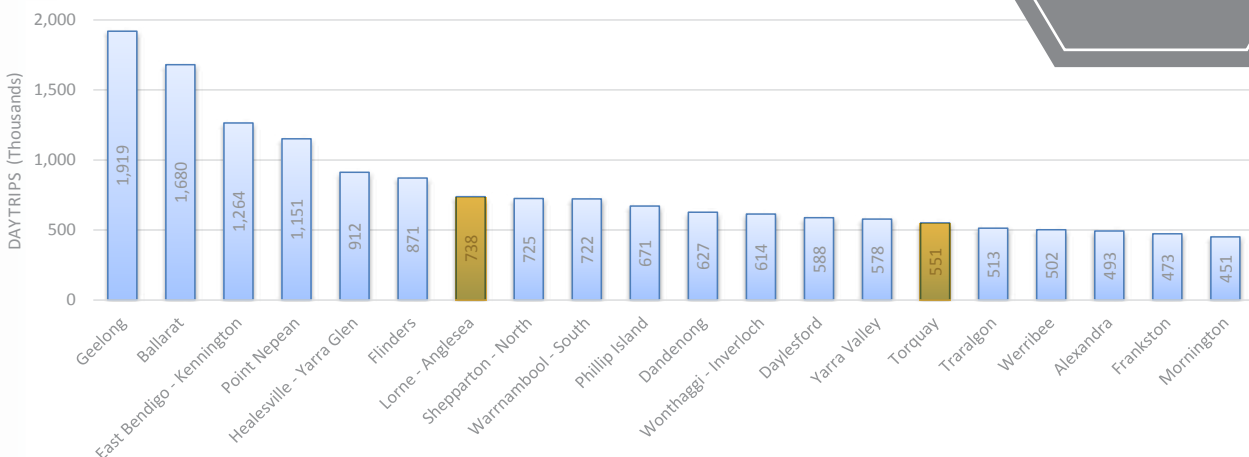
## TOP 20 REGIONAL DAY TRIP DESTINATIONS VICTORIA

Within Victoria both Lorne – Anglesea and Torquay are in Victoria's top 20 regional destinations for daytrips visitors. Both destinations have also had an increased number of domestic overnight visitor trips from 2014/15.



LORNE-ANGLESEA IS THE 7TH MOST VISITED DESTINATION IN REGIONAL VICTORIA, TORQUAY IS THE 15TH

## TOP 20 VICTORIAN REGIONAL DAYTRIPS



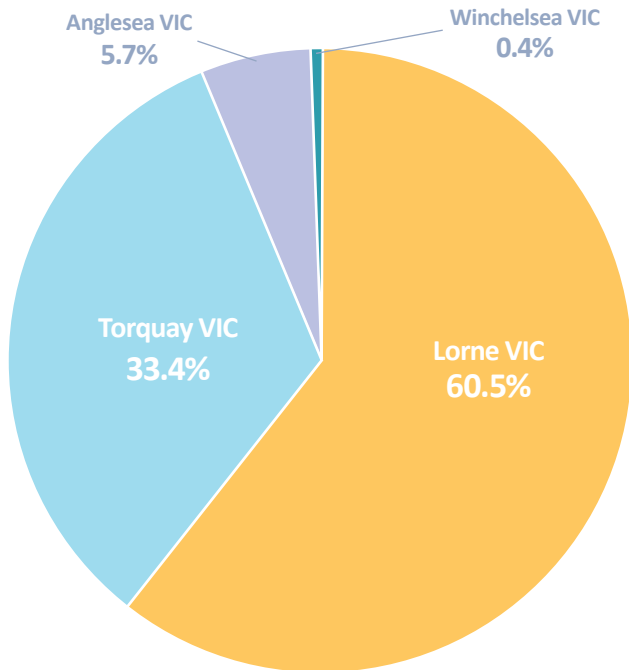




## VISITOR INFORMATION CENTRES (VICs)

In 2015/16, the Surf Coast Visitor Information Centres assisted 259,296 people. The Lorne Visitor Centre answered 60% of all enquiries, followed by Torquay (33%), Anglesea (6%) and Winchelsea (less than 1%).

### VISITOR INFORMATION CENTRE ENQUIRIES



LORNE VISITOR INFORMATION CENTRE



TORQUAY VISITOR INFORMATION CENTRE

## THE GREAT OCEAN ROAD STORY

The Lorne Visitor Information centre is also home to The Great Ocean Road Story, a permanent exhibition telling the story of the construction of the Great Ocean Road.

The story of the construction of the Great Ocean Road captures a unique time in Australia's and the world's history when the Great Ocean Road itself was built over a 13 year period by more than 3,000 Australian ex-servicemen and other individuals whose toil, sweat, blisters, hardships, heat, cold and adversity resulted in a breathtaking memorial to those who fought for Australia during World War One.

Now also available to add to this exhibition is the recently published "Historical drivers guide to the Great Ocean Road" the publication features local history and maps, points of interest and interpretive plaques, available for purchase at the centres.

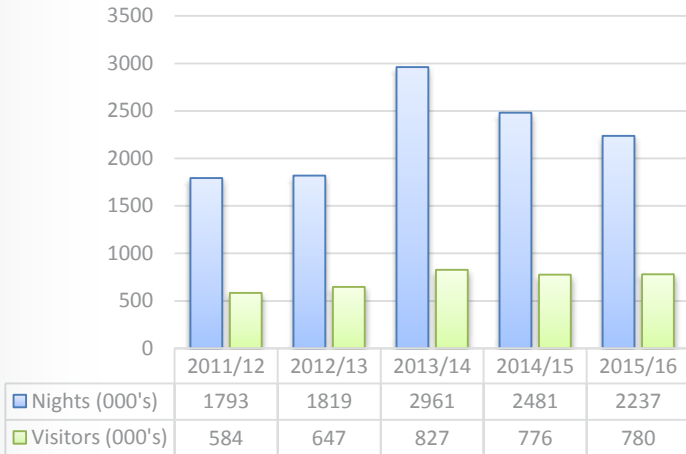


## SURF COAST DOMESTIC OVERNIGHT VISITOR PROFILE

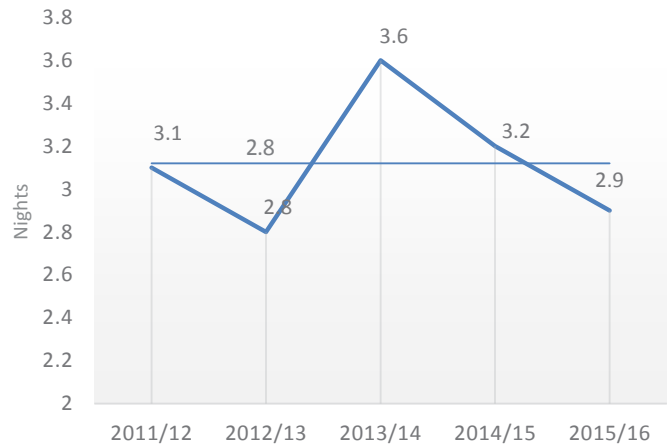
The Surf Coast received 780,000 domestic overnight visitors in the 2015/16 financial year. This represents an average increase of 5.9% over the past five years. Visitors spent more than 2.2 million nights in the region, up by 4.8% during the same period. The average length of stay has decreased from 3.2 nights to 2.9 nights.

DOMESTIC OVERNIGHT VISITORS STAYED FOR LESS TIME OVER THE LAST 2 YEARS

### DOMESTIC OVERNIGHT VISITORS

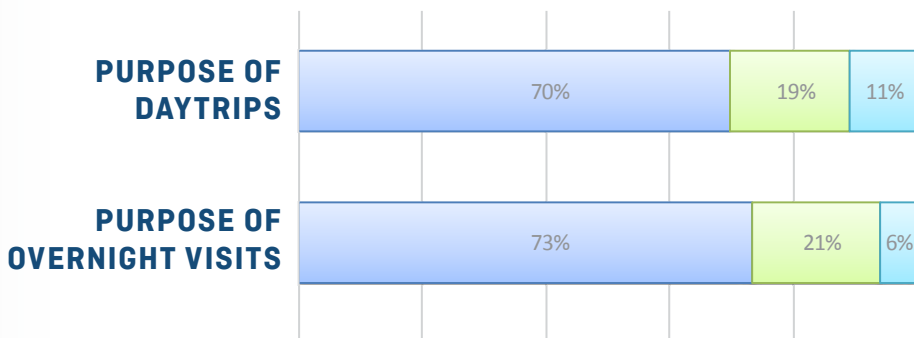


### AVERAGE LENGTH OF STAY



## PURPOSE OF VISIT TO THE SURF COAST

Holiday (70%) was the largest purpose for domestic overnight visitors to the region, followed by visiting friends & relatives (19%) and business (11%). Holiday was the largest purpose in terms of visitor nights, followed by 21% visiting friends & relatives and 6% business.

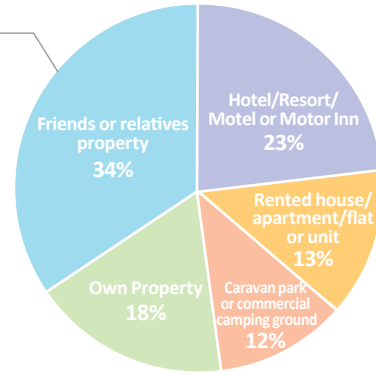


■ Holiday   
 ■ Visiting friends and relatives   
 ■ Business - Other

# ACCOMMODATION

'Hotel/resort/motel' was the most popular commercial accommodation option (23%) followed by caravan park (13%). In 2015/16, over 52% of overnight visitors stayed at a friends or relatives property or their own holiday house.

**ACCOMMODATION TYPE**



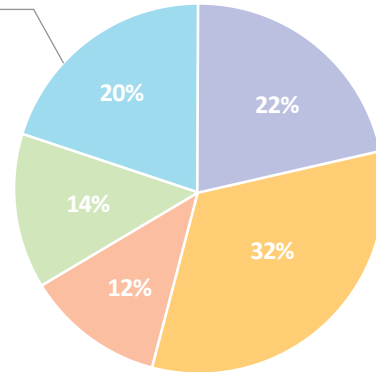
# ORIGIN

The region received 88.42% of visitors and 84.63% of nights from within Victoria. The majority (63%) of these visitors came from Melbourne.

Interstate visitation contributed 11.58% of total domestic overnight visitors with NSW as the primary source market (39%) followed by South Australia (22%).

**ORIGIN**

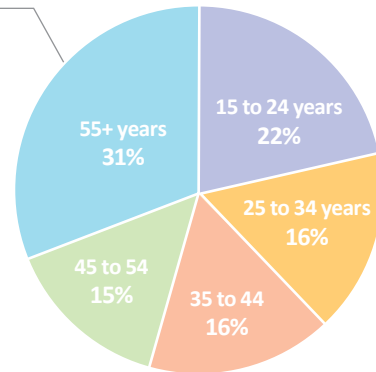
- United Kingdom
- Europe
- New Zealand
- United States of America - Canada
- Other Countries



# AGE

The most common type of domestic overnight visitor to the Surf Coast in 2015/16 was aged 55+ (31%).

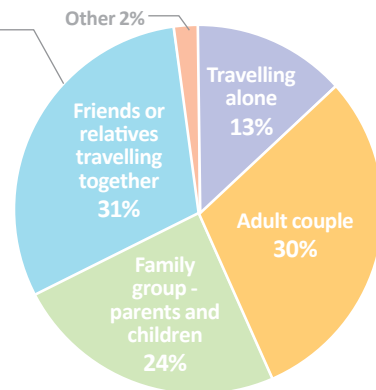
**AGE OF DOMESTIC OVERNIGHT VISITOR**



# TRAVEL PARTY

Most domestic overnight visitors (55%) were friends or family travelling together. 30% were adult couples.

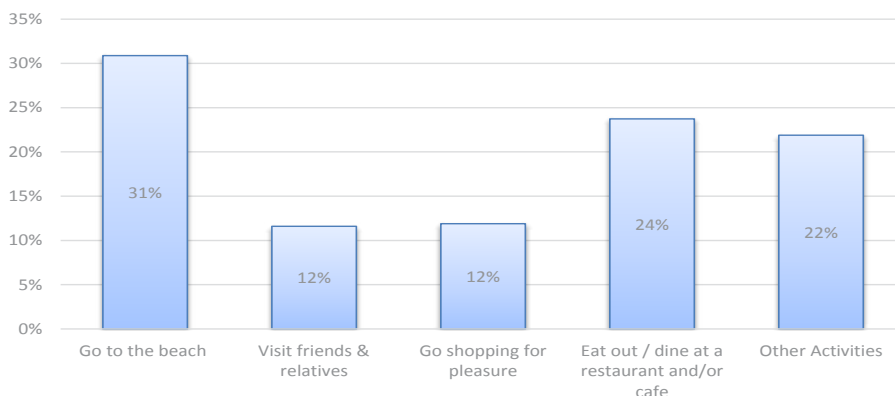
**TRAVEL PARTY**



# ACTIVITIES AND ACCOMMODATION TYPES

The most popular activity for day trip visitors in 2015/16 was to go to the beach (31%), followed closely by eating out (24%) and shopping (12%).

## MOST POPULAR DAYTRIP ACTIVITIES

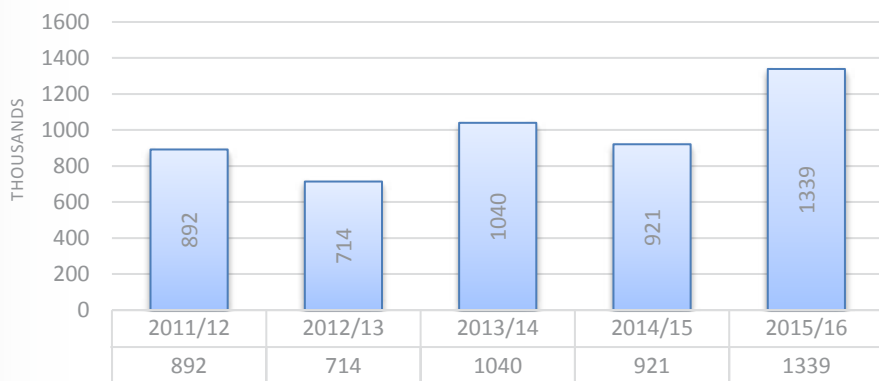


THE RENTAL OF PRIVATE ACCOMMODATION GREW BY 8.7% IN 2016. THERE ARE 560 AIRBNB LISTINGS IN SURF COAST SHIRE.  
Tourism and hotel market outlook, Deloitte 2017

## SURF COAST DAY VISITOR PROFILE

The Surf Coast received over 1.3 million domestic daytrip visitors in 2015/16. The number of day trip visitors has increased by 8.5% on average over the past five years. The majority (61%) of day-trippers came from Melbourne.

### DAY TRIP VISITORS

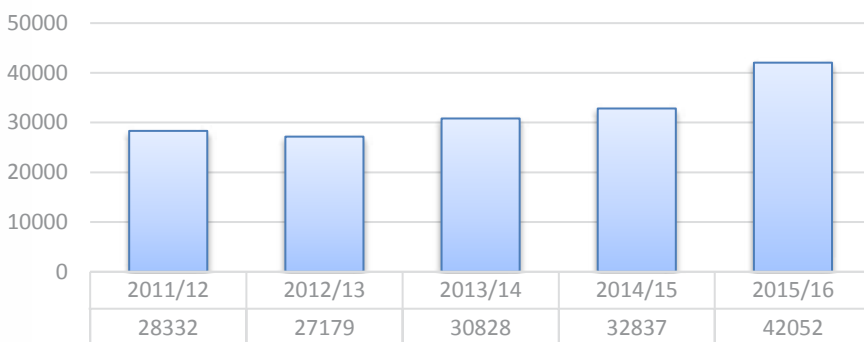


THE UK AND NEW ZEALAND REMAIN THE TWO LARGEST SINGLE MARKETS FOR INTERNATIONAL VISITATION TO SURF COAST. NATIONALLY, AUSTRALIA IS EXPERIENCING INCREASING NUMBERS OF VISITORS FROM ASIA.

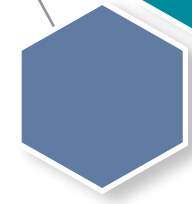
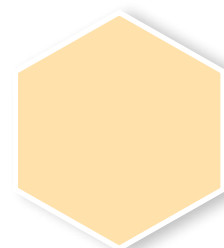
## SURF COAST INTERNATIONAL VISITOR PROFILE

The Surf Coast received 42,052 international overnight visitors. Since 2011/12, total international visitation has grown by an average of 8.2% per year.

### INTERNATIONAL VISITORS



'Other Europe' was the source of most international visitors to the Surf Coast (32%), followed by United Kingdom (22%), and 'other countries' (both 20%).





## TORQUAY & LORNE-ANGLESEA SUB-REGION PROFILES

The following section compares a visitor profile using specific data sets for Torquay and Lorne – Anglesea. Data is less reliable on a smaller area and in some cases; the statistics are gained from an average of a four year profile. Where possible data is used from financial year end 2015/16. The data for Winchelsea is not available as it was not statistically significant or available from Tourism Research Australia.

IN 2015/16, LORNE-ANGLESEA RECEIVED A TOTAL OF 1,238,693 VISITORS AND TORQUAY RECEIVED A TOTAL OF 857,442 VISITORS

### SUB-REGION TOTAL VISITATION

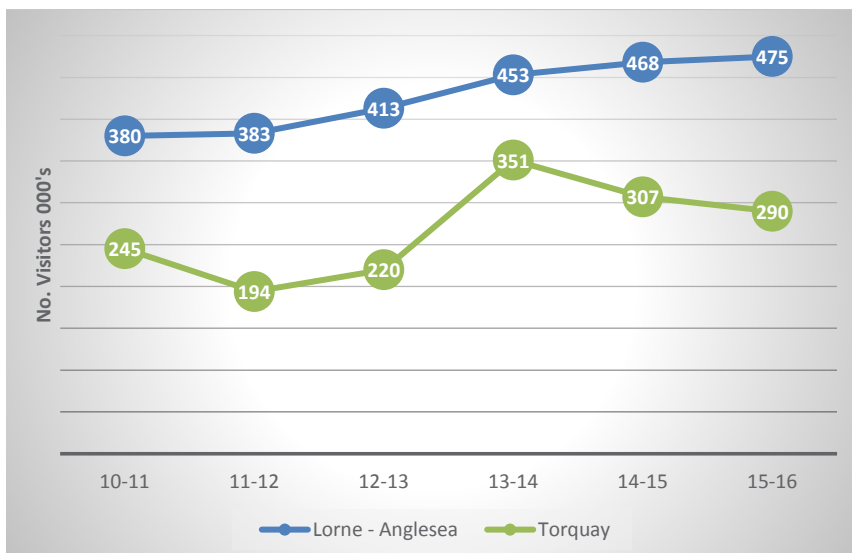
#### VISITOR NUMBERS

Surf Coast Visitor Type	Torquay	Lorne - Anglesea
Domestic Day Visitors	551,000	738,000
Domestic Overnight Visitors	290,000	475,000
International Visitors	16,442	25,693
Total	857,442	1,238,693

## SUB REGION DOMESTIC OVERNIGHT VISITORS

The number of domestic overnight visitors to Torquay has increased at an average rate of 3.33% over the past five years. Lorne domestic overnight visitors has increased by 4.6% on average over the same period.

### DOMESTIC OVERNIGHT VISITORS



## SUB REGION DOMESTIC VISITOR NIGHTS

Lorne received over 1.24 million visitor nights in 2015/16 and Torquay received 847,000.

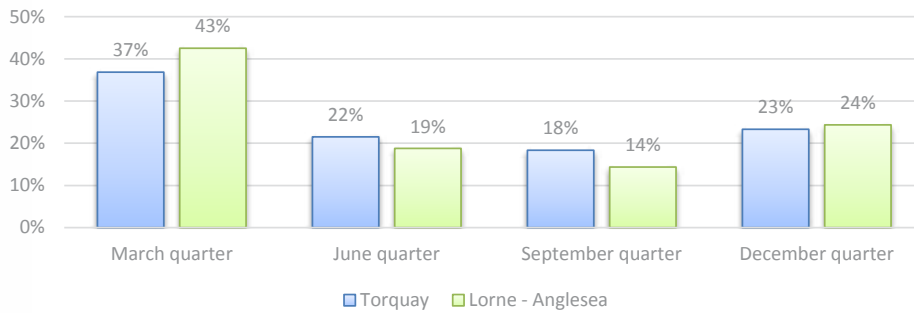
The average length of stay in Lorne-Anglesea has decreased from 2.8 nights in 2010/11 to 2.6 nights in 2015/16. The average length of stay in Torquay has decreased from 2.3 nights to 1.9 nights over the same period.

# SUB REGION VISITATION BY QUARTER

THE MARCH QUARTER WAS THE MOST POPULAR TIME OF YEAR FOR OVERNIGHT VISITORS TO TORQUAY AND LORNE-ANGLESEA.



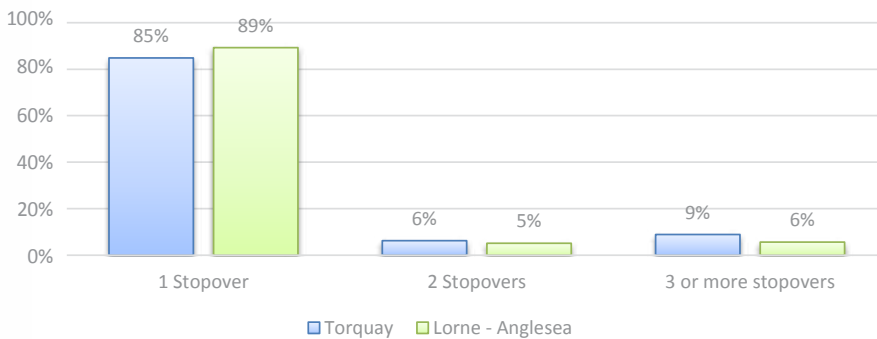
## VISITATION BY QUARTER



# SUB REGION STOPOVERS

OVER 85% OF ALL VISITORS TO BOTH DESTINATIONS HAD A SINGLE STOPOVER DURING THEIR TRIP.

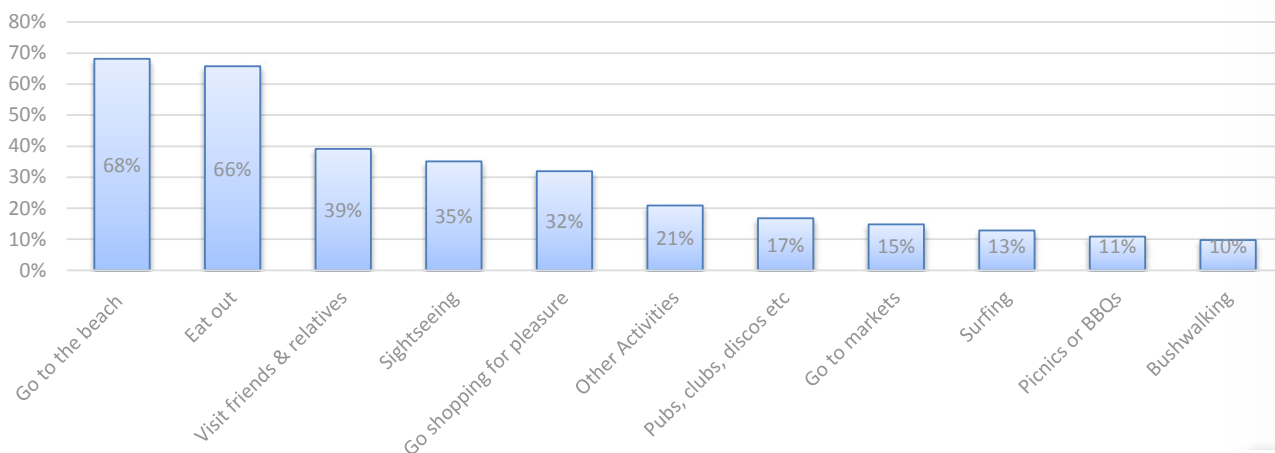
## OVERNIGHT STOPOVERS



# SUB REGION ACTIVITIES

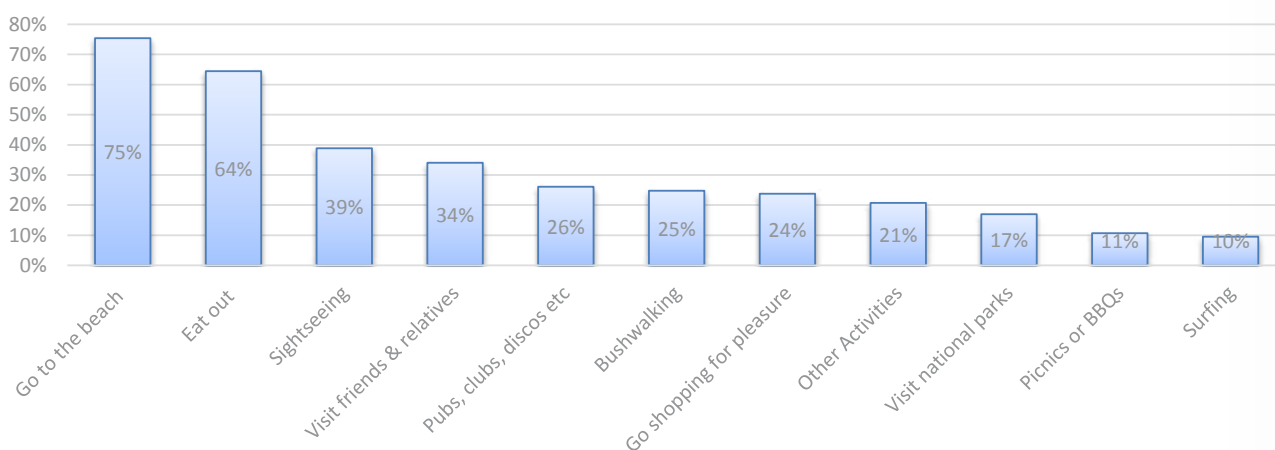
The most popular activities in Torquay are going to the beach (68%), eating out (66%) and visiting friends or relatives (39%).

## TORQUAY TOP ACTIVITIES



The most popular activities in Lorne are going to the beach (75%), eating out (64%) and sightseeing (39%).

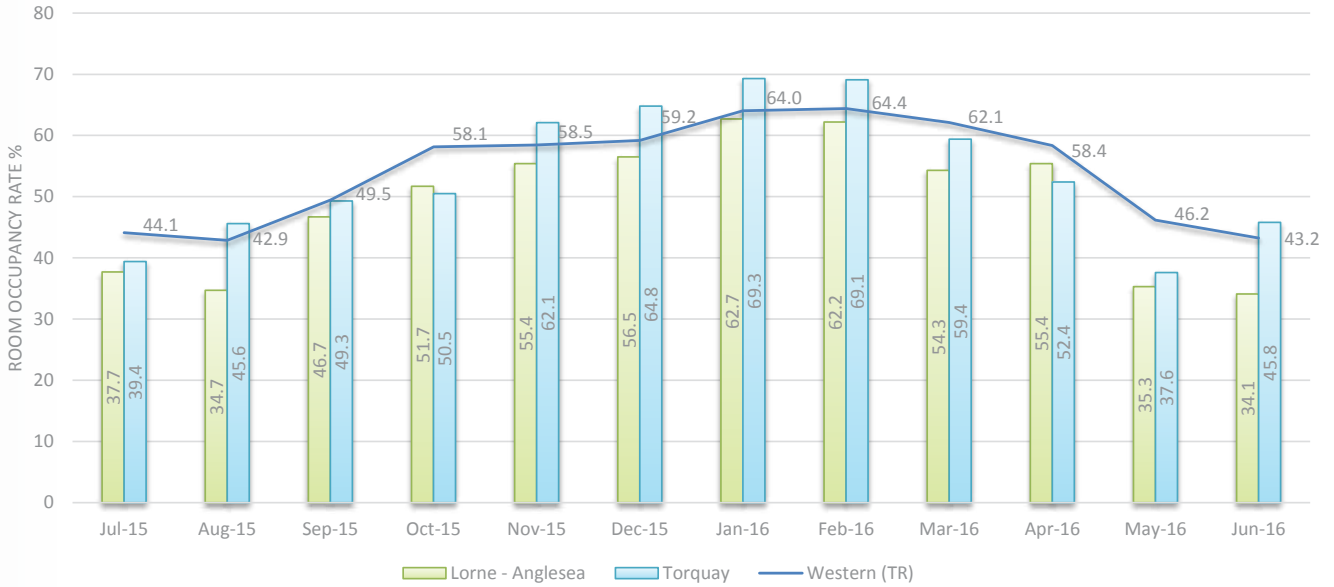
## LORNE TOP ACTIVITIES



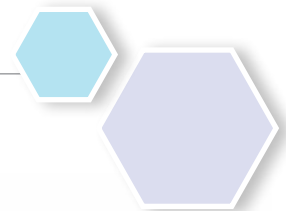
# ROOM OCCUPANCY RATE



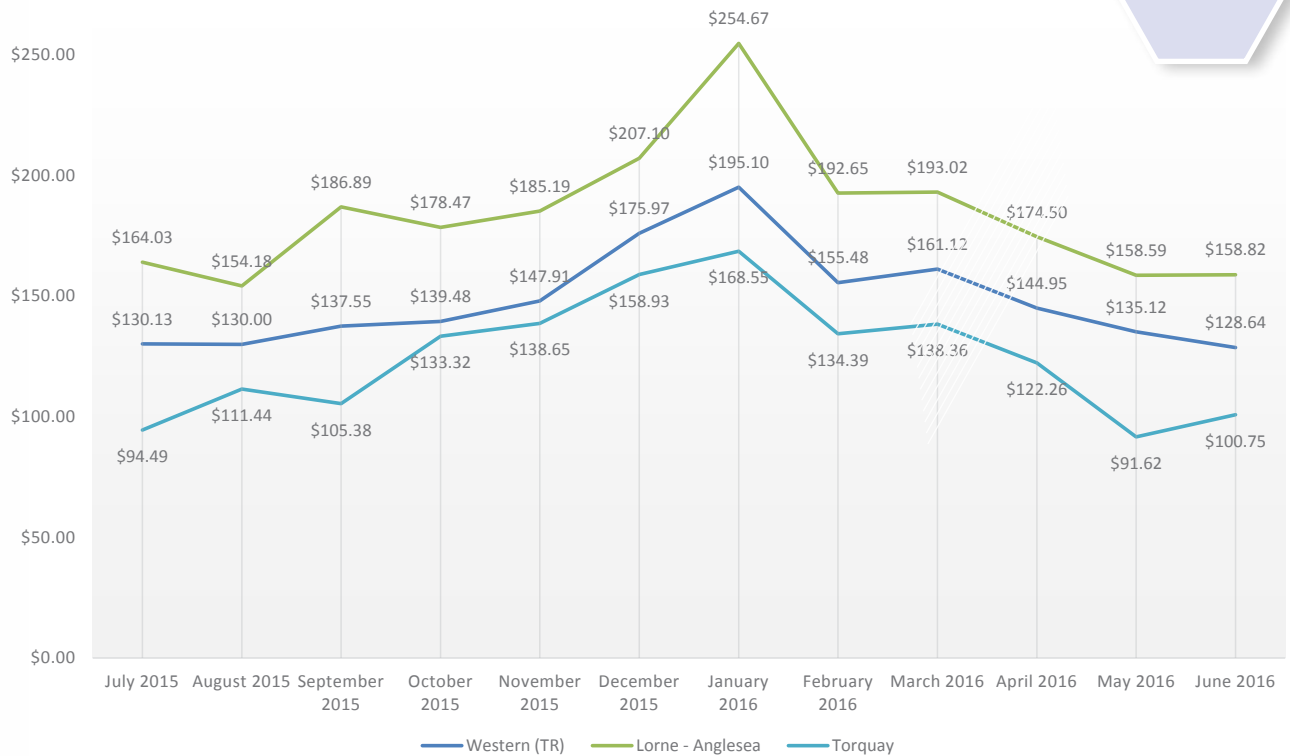
## OCCUPANCY RATE



# TAKINGS PER ROOM NIGHT



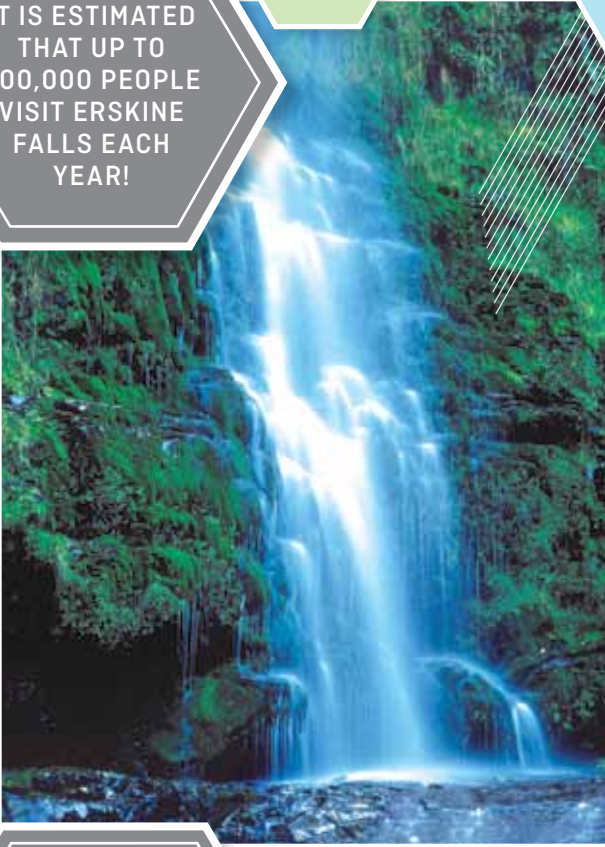
## AVERAGE TAKINGS PER ROOM





# KEY ATTRACTIONS BEING VISITED IN THE REGION

IT IS ESTIMATED THAT UP TO 500,000 PEOPLE VISIT ERSKINE FALLS EACH YEAR!



THE DRESSMAKER COSTUME EXHIBITION HELD IN 2016 ATTRACTED OVER 22,000 VISITORS TO THE BARWON PARK MANSION IN WINCHELSEA.



EACH YEAR OVER 54,000 PEOPLE ENJOY A WORLD CLASS WALKING DESTINATION OFFERING INSPIRING LANDSCAPES ALONG THE SURF COAST WALK



SHOPPING AT SURF CITY IS A POPULAR ACTIVITY, ATTRACTING OVER 1 MILLION VISITORS EACH YEAR!

## SURF COAST EVENTS

# EVENTS BRING BIG BENEFITS TO THE SURF COAST



3,300  
INTERNATIONAL  
ATTENDEES

OVER  
240,000  
PARTICIPANTS

MEDIA EXPOSURE  
REACHES OVER  
40 MILLION  
PEOPLE

OVER 200  
EVENTS  
A YEAR



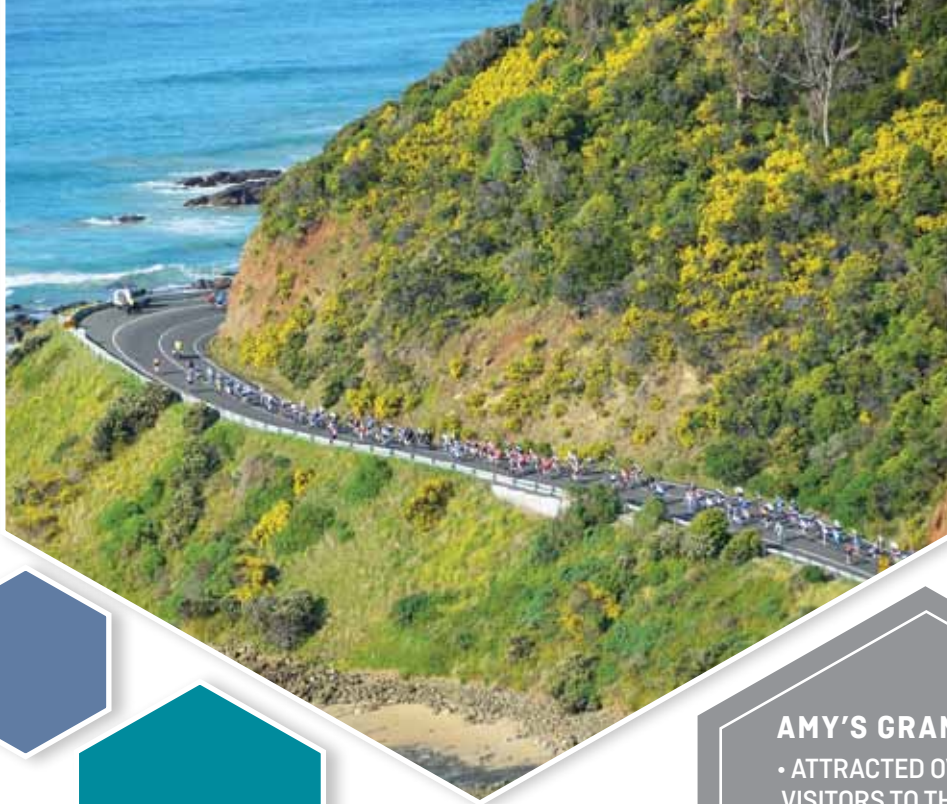
### CADEL EVANS GREAT OCEAN

- ATTRACTED OVER 21,000 VISITORS TO THE REGION.
- ESTIMATED ECONOMIC BENEFIT TO THE LOCAL REGION OF \$11.3 MILLION



### RIP CURL PRO 2016

- ATTRACTED OVER 41,000 VISITORS TO THE REGION.
- 3,000 FROM INTERSTATE AND OVERSEAS.
- ESTIMATED ECONOMIC BENEFIT TO THE LOCAL REGION OF \$7.4 MILLION.



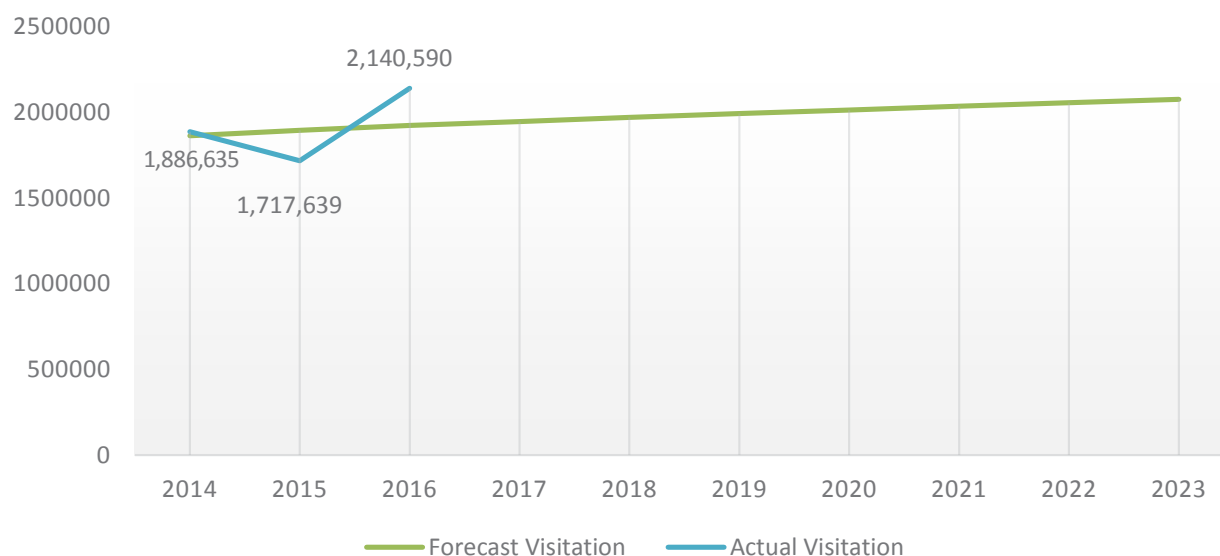
**AMY'S GRAN FONDO**

- ATTRACTED OVER 18,000 VISITORS TO THE REGION.
- 3,000 FROM INTERSTATE AND OVERSEAS.
- ESTIMATED ECONOMIC BENEFIT TO THE LOCAL REGION OF \$15.2 MILLION.

## FUTURE VISITATION

In 2014, Great Ocean Road Regional Tourism as part of the 'Strategic Master Plan for The Great Ocean Road Region Visitor Economy 2015 – 2025' projected various visitation scenarios for the coming decade. Forecasting for a low to moderate level of annual growth (1.7%pa), visitation to Surf Coast Shire was 217,341 visitors above forecast, and a 422,951 increase from the ending June 2015 to the year ending June 2016. This change has been driven by strong growth of domestic day trippers and residents located outside the municipality visiting Surf Coast Shire.

## VISITATION FORECAST 2014 – 2023



# VISITOR INSIGHTS 2015/16



Council's Economic Development & Tourism Unit has collated a range of statistics to assist businesses in making strategic decisions about expanding or relocating to the Surf Coast including:

- Economic Snapshot
- Surf Industry Mapping
- Visitor Insights
- Economic Impact of Events

Contact us for more information and advice.

## ENQUIRIES

All enquiries about this report should be directed to the Economic Development Unit at Surf Coast Shire on (03) 5261 0600.

## CONTACT DETAILS

Surf Coast Shire

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