Domestic overnight visitors spend the most money per day in the Surf Coast.
Purpose of report

This Visitor Insights report presents key statistics and information about tourism visitation to the Surf Coast Shire for the 2018 calendar year

It provides a range of visitation data including visitor expenditure, numbers, popular activities, profiles and patterns for the shire as well as an overview of total visitation to the Surf Coast and several key destinations including Torquay, Lorne and Anglesea and the Surf Coast Hinterland.

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.

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)

National Visitor Survey – Release information

Use caution when comparing 2019 NVS estimates with earlier years. The move to 100% mobile phone interviewing has seen increases to 2019 NVS estimates which have an upward influence on growth rates.

Data for 2017 and 2018 has been revised to align with the latest ABS population projections and will differ from previously published estimates. For further information see: NVS Methodology

International Visitor Survey – Notice changes to estimates

The release of December 2018 data includes purpose of visit information and revisions to the IVS estimates from 2005 to 2018. As results have been revised back to 2005, results from previously published data can not be compared and should not be used.

Please see the International Visitor Survey methodology for further information.

The official tourism figures only include international overnight visitors, there is a calculation for international day figures on page 12.

For more information please visit www.tra.gov.au
Introduction

Surf Coast Shire: Tourism engine room of the Great Ocean Road

The Surf Coast Shire is located in south-western Victoria, 1.5 hours from Melbourne’s CBD and 20 minutes south of Geelong’s CBD. Its beaches, natural attractions, major events and outdoor activities make it a renowned tourism region in Victoria.

The Surf Coast economy is unique and it’s growing. Powered by sectors including surfing, tourism, construction and small business, it supports over 3,500 businesses which drive an economy estimated to be worth over $1.3 billion annually*. A rise in home-based, innovative and creative businesses has led to the Surf Coast being recognised as the fourth largest lifestyle-lead innovation hotspot in Australia.**

During 2018, the Surf Coast Shire attracted over 2.49 million visitors, generating over $544 million in tourism expenditure. While domestic day trippers are the most common type of visitor (58%), domestic overnight visitors contribute the highest spend (69%). International overnight visitor numbers are small (2%) but growing.

Tourism is an amalgam of activities across various industry sectors such as retail, accommodation and food services, and arts and recreation services. It is the second largest industry in the Surf Coast Shire and is reported to generate over $288 million in output. Accommodation and food services represents 72% of this figure.*

Tourism provides 1,536 jobs (16.5%) to the Surf Coast economy and over $67 million in wages and salaries is attributed to tourism in the shire each year.*

Strong population growth will see a need to create approximately 2,500 additional jobs by 2036 in a shire where some 87 per cent of all businesses employ four or less people. The tourism sector will play an important role in providing these jobs.

*Source: RemPlan Economy.
**Source: Regional Australia Institute, 2018.

Tourism attracted more than 2.49 million visitors in 2018
The Surf Coast region received an estimated 2.49 million total visitors to the financial year ending December 2018. The region received over 2.55 million overnight visitor nights during the same period with a direct expenditure of $544 million. Compared to 2017, overall visitor numbers and expenditure increased by 14% and 5% respectively. The sluggish growth of domestic visitor nights contributed to a lower than expected yield.

### Summary of Visitors to the Surf Coast

<table>
<thead>
<tr>
<th>Visitor Type</th>
<th>Total Travel</th>
<th>Visitor Nights</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Day</td>
<td>2.49m visitors</td>
<td>-</td>
<td>$145m</td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>2.55m visitor nights</td>
<td>2.5 million</td>
<td>$377m</td>
</tr>
<tr>
<td>International</td>
<td>-</td>
<td>0.2 million</td>
<td>$22m</td>
</tr>
</tbody>
</table>

### Visitor Type

<table>
<thead>
<tr>
<th>VISITOR TYPE</th>
<th>Domestic Day</th>
<th>Domestic Overnight</th>
<th>International</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Day</td>
<td>1.46 million</td>
<td>1.02 million</td>
<td>0.05 million</td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>–</td>
<td>2.5 million</td>
<td>0.2 million</td>
</tr>
<tr>
<td>International</td>
<td>–</td>
<td>–</td>
<td>–</td>
</tr>
</tbody>
</table>

- **Domestic Day**: 1.46 million visitors (22% increase) with $145 million expenditure (22% increase).
- **Domestic Overnight**: 1.02 million visitors (4% increase) with $377 million expenditure (1% increase).
- **International**: 0.05 million visitors (3% increase) with $22 million expenditure (22% decrease).

More visitors are coming to the Surf Coast and spending more money but they’re not staying as long as they used to.

Note: Although the data shows a large increase in the number of domestic day visitors and a large decrease in international visitor nights and expenditure, the data indicates to a 95% confidence level that this is not a statistically significant change. Numbers may not exactly match the total travel figures due to rounding.
Total Travel to the Surf Coast

Five Year Visitor Trend

A five year trend of visitation to the Surf Coast Shire shows that:

- Visitor numbers are generally increasing
- Visitor nights are generally increasing
- Expenditure is generally increasing

However...

- Length of stay for domestic overnight visitors is going down

The average length of stay has reduced from 3 nights to 2.5 nights on average over the past five years.

Type of visitor by %

Most of the visitors to the Surf Coast are day trippers (58%). However, 69% of the tourism expenditure comes from domestic overnight visitors.

Average spend per visitor

Expenditure per day per type:

Visitor type | Daily | Trip
---|---|---
Day trip | $99 | –
Domestic Overnight | $147 | $367
International | $109 | $425

Source: GORRT Report provided by Data Insights to year end December 2018. The average daily spend per visitor has been applied to all visitor numbers and nights in previous years to allow a comparison on relative expenditure.

Visitation by quarter

Spring and Summer are the most popular seasons to visit the Surf Coast. Most people (38%) visit in between January to March.

Average length of stay for domestic overnight visitors:

<table>
<thead>
<tr>
<th>Year</th>
<th>Length of Stay</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>3.0</td>
</tr>
<tr>
<td>2015</td>
<td>2.8</td>
</tr>
<tr>
<td>2016</td>
<td>2.7</td>
</tr>
<tr>
<td>2017</td>
<td>2.6</td>
</tr>
<tr>
<td>2018</td>
<td>2.5</td>
</tr>
</tbody>
</table>

2014 2015 2016 2017 2018

Domestic overnight

2014 2015 2016 2017 2018

Domestic Day

Jan-March 38%

Oct-Dec 27%

July-Sept 19%

April-June 17%

Source: GORRT Report provided by Data Insights to year end December 2018. The average daily spend per visitor has been applied to all visitor numbers and nights in previous years to allow a comparison on relative expenditure.
Regional Comparison

Surf Coast market share of the Great Ocean Road region

Tourism on the Surf Coast compared to the Great Ocean Road (YE Dec 2018):

In comparison to the Great Ocean Road, the Surf Coast receives:

- **45%** of all visitation
- **39%** of all nights
- **41%** of all expenditure

Market share by visitor type:

<table>
<thead>
<tr>
<th>Visitor Type</th>
<th>Great Ocean Road</th>
<th>Surf Coast</th>
<th>Surf Coast market share of the GOR (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Day</td>
<td>3,156</td>
<td>1,462</td>
<td>46%</td>
</tr>
<tr>
<td>Domestic Overnight</td>
<td>2,269</td>
<td>1,022</td>
<td>45%</td>
</tr>
<tr>
<td>International Overnight</td>
<td>239</td>
<td>51</td>
<td>22%</td>
</tr>
</tbody>
</table>

Victorian Tourism Region Comparison Analysis

In 2018, the Great Ocean Road region received the seventh highest level of domestic overnight and day trip visitation in regional Victoria. If the Surf Coast was a tourism region, it would receive more visitors than Phillip Island (2.2m) or the Grampians regions (2.4m). The Murray received the highest level of average annual growth in domestic visitation over the past 5 years (27.76%). The Great Ocean Road was 7th (10.89%) overall in terms of visitor numbers and growth.

Domestic Day and Overnight Visits by tourism region – Dec 2018:

<table>
<thead>
<tr>
<th>Tourism region</th>
<th>Visits 2018</th>
<th>5 year AAG</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Melbourne</td>
<td>29.4m</td>
<td>4.28%</td>
</tr>
<tr>
<td>2. Mornington Peninsula</td>
<td>7.7m</td>
<td>4.42%</td>
</tr>
<tr>
<td>3. Goldfields</td>
<td>7.1m</td>
<td>12.58%</td>
</tr>
<tr>
<td>4. Murray</td>
<td>6.0m</td>
<td>27.76%</td>
</tr>
<tr>
<td>5. Gippsland</td>
<td>5.8m</td>
<td>14.55%</td>
</tr>
<tr>
<td>6. Yarra Valley &amp; Dandenong Ranges</td>
<td>5.8m</td>
<td>7.3%</td>
</tr>
<tr>
<td>7. Great Ocean Road</td>
<td>5.4m</td>
<td>10.89%</td>
</tr>
<tr>
<td>8. Geelong &amp; The Bellarine</td>
<td>5.3m</td>
<td>6.62%</td>
</tr>
<tr>
<td>9. High Country</td>
<td>4.0m</td>
<td>6.61%</td>
</tr>
<tr>
<td>10. Daylesford &amp; the Macedon Ranges</td>
<td>2.8m</td>
<td>13.24%</td>
</tr>
<tr>
<td>11. Grampians</td>
<td>2.4m</td>
<td>31.22%</td>
</tr>
<tr>
<td>12. Phillip Island</td>
<td>2.2m</td>
<td>9.84%</td>
</tr>
</tbody>
</table>
The Surf Coast received 1.46 million day trip visitors in 2018. The visitation increased on last year and has trended upwards over the past five years. Day trip visitors spent $99.13 million in the Surf Coast last year. This represents 27% of total visitor expenditure.

### Domestic Day Visitor Profile

**Surf Coast Day Trip Trend 2014-2018:**

<table>
<thead>
<tr>
<th>Year</th>
<th>Visitors (000)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>1,058.97</td>
</tr>
<tr>
<td>2015</td>
<td>1,064.07</td>
</tr>
<tr>
<td>2016</td>
<td>1,443.89</td>
</tr>
<tr>
<td>2017</td>
<td>1,196.44</td>
</tr>
<tr>
<td>2018</td>
<td>1,462.70</td>
</tr>
</tbody>
</table>

Refer to National Visitor Survey release notes regarding year on year comparison on page 2.

Who am I? I am a domestic day visitor...

- My favourite things to do are eating out (70%) going to the beach (65.3%), and exploring new places with friends (22.9%). Sometimes I like to go surfing (7.7%).
- I mainly come to find that holiday feel (72.7%). My friends and family draw me back (20.5%).
- I travel by car (97%).
- I'm most likely to come from Melbourne (68%), from suburbs like Werribee, Essendon, Brunswick or Williamstown.
- I have a partner (68%) and I'm most likely to have a child aged 5-14 (30%).
- I like to head down to the Surf Coast in January (20%). February (12%) and December (11%) are pretty good too. I don't like to come in May (3%).
- I'm likely to earn more than $100,000 per year and I have a budget of $100 for the day.
- I work full time (49%).
### Purpose of visit
- Holiday: 72.7%
- Visiting friends and relatives: 20.5%
- Business: 2.3%
- Other reason: 4.6%

### Transport used
- Private vehicle or company car: 97.1%
- Bus/coach/ferry: 2.9%

### Favourite activities
- Eat out/dine at a restaurant and/or café: 70.0%
- Go to the beach: 65.4%
- Sightseeing/looking around: 29.8%
- Visit friends & relatives: 29.0%
- Bushwalking / National Park visit: 17.3%
- Go shopping for pleasure: 17.8%
- Go to a pub or club: 8.5%
- Surfing: 7.7%

### Reasons for choosing the Surf Coast
- Social activities: 90.9%
- Outdoor/nature: 73.9%
- Active outdoor/sports: 20.6%
- Local attractions: 8.2%
- Arts/heritage: 5.2%

### Favourite day to visit
- Sunday: 23%
- Monday: 7%
- Tuesday: 10%
- Wednesday: 8%
- Thursday: 13%
- Friday: 8%
- Saturday: 29%

### Favourite month to visit
- January: 20%
- February: 12%
- March: 9%
- April: 9%
- May: 3%
- June: 5%
- July: 7%
- August: 8%
- September: 6%
- October: 7%
- November: 8%
- December: 11%

### Age group
- 55+: 24%
- 25-29: 13%
- 30-34: 12%
- 40-44: 11%
- 35-39: 11%
- 20-24: 8%
- 50-54: 8%
- 15-19: 7%
- 45-49: 5%

### Income
- $85,000-$99,999: 15%
- $200,000+: 15%
- $150,000-$174,999: 12%
- $70,000-$84,999: 10%
- $175,000-$199,999: 10%
- $115,000-$129,999: 8%

### Employment status
- Working full time: 49%
- Working part time: 23%
- Unemployed and looking for work: 5%
- Retired or on a pension: 9%
- Mainly doing home duties: 4%
- Studying: 9%

### Family structure
- Single: 32%
- Part of a couple: 68%

### Daytrip origin (10 year average 2009-2018)
- Melbourne: 68%
- Geelong and the Bellarine: 18%
- Great Ocean Road: 7%
- Ballarat: 4%
- Melbourne East: 3%

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74% of **Domestic Day Trip** visitors are drawn to the Surf Coast for the natural environment.

### Surf Coast Day Trip visitor preference per month to YE Dec 2018:

![Surf Coast Day Trip visitor preference per month](chart)

43% of all day trip visitors come in **summer**
Domestic Overnight Visitor Profile

The Surf Coast received 1,022,000 domestic overnight visitors in 2018. The number of visitors has been growing steadily over the past 5 years. The number of visitor nights have also grown over the last five years, however the average length of stay has dropped from 3 nights to 2.5 nights in five years. These visitors spent $377m last year and represent 69% of all expenditure on the Surf Coast.

Who am I? I am a domestic overnight visitor...

- I earn 150k - $200k per year ($35%), work full or part time (64%) and I have a budget of around $370 for the trip.
- I'm most likely to stay at my friend or family's house. I prefer private accommodation (58%). If I do stay in commercial accommodation, I prefer to rent a house, go to a caravan park or find a luxury hotel.
- I'm most likely to stay for 1-2 nights (66%) and I base myself in one place (92%).
- I like to visit between December and April (54%).
- I love to go to the beach (72%) and eat out (63%).

I am over 55 years old and I'm most likely to be travelling with my partner or friends. No kids. (56%)

I'm Victorian (93%) and I come from Melbourne (77%), east Melbourne (4%), Geelong and Bellarine (4%) or the Peninsula (4%). I use my car to get here (92%).

I come for a holiday (75%) and to catch up with friends and family (20%).

I love to head down to the Surf Coast in January (20%), February (12%) and December (11%).

63% of Domestic Overnight visitors enjoy eating out while visiting the Surf Coast.
### Purpose of visit
- Holiday: 75.4%
- Visiting friends and relatives: 20.3%
- Business: 2.4%
- Other reason: 2.1%

### Accommodation preference
- Friends or relatives property: 29.2%
- Own property: 18.7%
- Hotel/resort/motel or motor Inn: 17.0%
- Rented house/apartment/flat or unit: 11.8%
- Caravan park or commercial camping ground: 10.8%
- Other Private Accommodation: 5.4%

### Accommodation preference
- Rented house/apartment/flat or unit: 28.6%
- Caravan park or commercial camping ground: 26.1%
- Luxury hotel or luxury resort (4 or 5 star): 21.2%
- Standard hotel/motor inn (below 4 star): 16.5%
- Guest house or Bed & Breakfast: 15.6%

### Top 10 activities
- Go to the beach: 72.4%
- Eat out/dine at a restaurant and/or café: 67.2%
- Bushwalking or visit National Park: 59.1%
- Sightseeing/looking around: 38.6%
- Visit friends & relatives: 35.1%
- Pubs, clubs, discos etc: 22.4%
- Go shopping for pleasure: 18.2%
- Exercise, gym or swimming: 18.2%
- Surfing: 7.2%
- Go to markets: 8.0%

### Travel party type
- Adult couple: 34.2%
- Friends or relatives travelling together: 22.3%
- Family group - parents and children: 21.9%
- Travelling alone: 16.4%
- Friends or relatives travelling together: 3.1%

### Preferred transport to the region
- Private vehicle or company car: 92.3%
- Aircraft: 3.0%
- Railway: 2.5%
- Rental car: 0.8%
- Bus/Coach: 0.9%
- Passenger lines and ferries: 0.3%
- Self-drive motorhome or campervan: 0.3%

### Number of stopovers on trip
- 1 stopover: 90.0%
- 2 stopovers: 4.8%
- 3 stopovers: 0.9%
- 4-7 stopovers: 1.3%

### Length of stay
- 1 night: 26.8%
- 2 nights: 39.2%
- 3 nights: 19.2%
- 4 nights: 7.3%
- 5 nights: 7.3%
- 6 nights: 4.0%
- 7 nights: 2.2%

### Age group
- 55+: 36.3%
- 20-24: 13.5%
- 50-54: 9.6%
- 35-39: 9.0%
- 45-49: 7.1%
- 40-44: 7.0%
- 25-29: 7.0%
- 30-34: 5.4%
- 15-19: 5.1%

### Origin of Domestic Overnight Visitors
- Victoria: 93.6%
- New South Wales: 3.0%
- Western Australia: 1.3%
- South Australia: 1.0%
- Queensland: 0.6%
- ACT: 0.4%
- Tasmania: 0.2%
- Northern Territory: 0.1%

### Intertaste vs intrastate
- Interstate: 9.0%
- Intra state: 91.0%

### Household income PA
- $200,000+: 24.1%
- $150,000-$174,999: 11.0%
- $55,000-$69,999: 10.6%
- $100,000-$114,999: 8.1%
- $25,000-$39,999: 6.0%
- $65,000-$99,999: 7.0%
- $70,000-$84,999: 6.7%
- $115,000-$129,999: 6.0%
- $40,000-$54,999: 6.0%
- $175,000-$199,999: 5.9%
- $130,000-$149,999: 4.5%
- $10,000-$24,999: 1.7%
- $1-$9,999: 0.3%

### Day of week returned from trip
- Sunday: 44.8%
- Monday: 16.4%
- Tuesday: 9.2%
- Wednesday: 8.9%
- Thursday: 4.0%
- Friday: 6.6%
- Saturday: 9.5%

### Month returned from trip
- January: 12.4%
- February: 12.1%
- March: 9.6%
- April: 11.7%
- May: 8.8%
- June: 5.0%
- July: 5.6%
- August: 5.7%
- September: 4.0%
- October: 9.1%
- November: 7.8%
- December: 8.3%
The Surf Coast received 51,510 overnight visitors in 2018, a figure which has been slowly rising over the past five years. International visitor nights have also increased over a five year trend. The average length of stay is 3.9 nights compared to 2.5 nights for domestic visitors. These visitors spent $22 million last year which is less than previous years. International expenditure represents only 4% of all expenditure on the Surf Coast.

International Visitor Trend 2013-2017:

<table>
<thead>
<tr>
<th>Year</th>
<th>Nights</th>
<th>Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>106.18</td>
<td>31.60</td>
</tr>
<tr>
<td>2015</td>
<td>95.43</td>
<td>38.52</td>
</tr>
<tr>
<td>2016</td>
<td>149.35</td>
<td>43.01</td>
</tr>
<tr>
<td>2017</td>
<td>258.69</td>
<td>50.02</td>
</tr>
<tr>
<td>2018</td>
<td>201.72</td>
<td>51.51</td>
</tr>
</tbody>
</table>

Who am I? I am an international visitor...

- I come to the Surf Coast for a holiday (58%). I have a budget of $109 to spend each day.
- I’m most likely to come from the UK (16%), USA (11%) or China (10%).
- I’m most likely to stay in commercial accommodation and when I do I’ll usually choose a hotel (49%) or a caravan park (24%).
- I love to head down to the Surf Coast in January (20%), February (12%) and December (11%).
- I’m most likely to be either over 55 (22%) or in my late 20s (20%). I mainly travel on my own or with my partner. I like to visit from October to March (76%).
- My favourite things to do are eating out (100%), going to the beach and National Parks (98%), and sightseeing or shopping (86%).
- There’s a 50/50 chance I haven’t been to Australia before. If I have, it’s only once or twice. I rely on the internet (56%) or word of mouth (25%) to plan my itinerary, look for airfares and book accommodation. I fly into Melbourne when I come. Sometimes Sydney.
- The Surf Coast is usually my second or third place I stay overnight on my trip to Australia.
- I rent a car (41%) or campervan (8%) to get around the Surf Coast.
Purpose of visit
Holiday 58.4%
Visiting friends and relatives 27.7%
Business 6.2%
Employment 3.4%
Education 4.2%

Accommodation preference
Commercial accommodation 72.8%
Private accommodation 27.6%

Transport
Rental car 41.6%
Private vehicle or company car 33.2%
Self-drive motorhome or campervan 8.2%
Note: Only 1.3% of international overnight visitors come to the Surf Coast by tour bus.

Stopover order
2nd stopover 36.0%
3rd stopover 18.1%
1st stopover 17.4%

Favourite quarter of year to visit
March quarter 40.5%
June quarter 13.0%
September quarter 11.2%
December quarter 35.4%

Age group
55+ 21.8%
25-29 20.1%
20-24 13.6%
30-34 10.4%
35-39 10.1%
50-54 10.0%
40-44 6.8%
45-49 4.7%
15-19 2.5%

City of arrival
Melbourne 65.3%
Sydney 22.2%
Brisbane 5.2%
Adelaide 4.6%

Number of previous visits
No previous visit 50.3%
1 17.4%
2 10.6%
3 5.6%
4 to 7 8.8%
8 to 20 7.3%

Planning the visit
Internet 56.4%
Friend or relative living in Australia 24.7%
Previous Visit(s) 11.6%
Travel book or guide 18.2%
Friend or relative who has visited Australia 12.7%

Travel party type
Unaccompanied traveller 43.1%
Adult couple 35.0%
Family group - parent(s) and children 10.5%
Friends and/or relatives travelling together with or without spouses 0.7%
School tour group (teachers and/or students) (2011 onwards) 0.3%

Country of origin (3 year average)
United Kingdom 16.4%
United States of America 10.6%
China 10.4%
Germany 9.4%
New Zealand 8.8%

International day trip visitors
The Great Ocean Road region experiences a high volume of international day trip visitors. These visitors differ greatly from the usual visitor profile in their overwhelming preference for single day tour bus packages. At the request of Council, Tourism Research Australia analysed their database to provide an estimate of the size of this market. This was done by identifying the places stayed overnight and places visited fields. When an international visitor said they visited the Great Ocean Road region but did not stay overnight, this was counted as an international day trip visitor.

Total GOR visitors 2018 showing plus average international daytrippers 2014-2018:

7,000
6,000
5,000
4,000
3,000
2,000
1,000
0
Total Great Ocean Road (GOR) Visitors 2018
Total GOR Visitors International Day Visitors
5,665.2
5,665.2
781.2

There are 3 times more international day visitors than international overnight visitors coming to the Great Ocean Road region.
Visitor Information Centres

The Surf Coast Shire operates four Visitor Information Centres across the Shire at Torquay, Lorne, Anglesea and Winchelsea.

Visitor Centre engagements in 2018:

<table>
<thead>
<tr>
<th></th>
<th>Torquay VIC</th>
<th>Lorne VIC</th>
<th>Anglesea VIC</th>
<th>Winchelsea VIC</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Walk-in enquiries</td>
<td>68,689</td>
<td>129,149</td>
<td>11,097</td>
<td>863</td>
<td>209,798</td>
</tr>
<tr>
<td>Phone enquiries</td>
<td>6,151</td>
<td>6,962</td>
<td></td>
<td></td>
<td>13,113</td>
</tr>
<tr>
<td>Total</td>
<td>74,840</td>
<td>136,111</td>
<td>11,097</td>
<td>863</td>
<td>222,911</td>
</tr>
</tbody>
</table>

Torquay and Lorne are fully accredited centres with salaried staff and volunteers assisting in their operation. Winchelsea and Anglesea are overseen by staff with volunteers providing the daily face to face information service. There are on average 70 volunteers assisting staff each week.

Our Visitor Information Centres are critical in engaging and inspiring visitors (face to face, phone or email) to stay longer in the Shire and experience more of what we have to offer or to provide basic information such as directions. The one on one direct engagement with a ‘local’ is a highly effective way to enhance and inform the visitor experience. Feedback from visitors is consistently very positive and provides direct evidence of Visitor Centre staff and volunteers increasing visitor stays and expenditure.

The Visitor Centre’s are also at the front line of changing visitor trends. There are emerging changes in visitation patterns with some visitors indicating January is too congested and are delaying their visit to February. Anecdotally, March is also being promoted in social media as an alternative month to travel the Great Ocean Road.

While visitors continue to utilise digital media, there is an increasing trend for tourists of all ages to visit our centres to ensure they have the correct information and/or to hear the local independent perspective.

In 2018 the Visitor Centres engaged 222,911 visitors.
Sub-Region Profiles

The following section compares the visitor profile for each of the Surf Coast’s sub-regions using specific data sets for Torquay, Lorne-Anglesea and the Surf Coast Hinterland to get a statistically significant sample on a five year average is best. The regions use are the defined SA2 region set by the Australian Bureau of Statistics. When looking at the data in this way, we can see:

**Lorne-Anglesea Visitor Profile 2014-2018**
Lorne-Anglesea receives the most visitors overall and has the highest number of overnight stays:

- Share of visitors to the Surf Coast: 55%
- Visitors on average: 1.19m
  - Day visitors: 54%
  - Night visitors: 44%
  - International visitors: 2%

**Hinterland Visitor Profile 2014-2018**
The Hinterland receives the fewest number of visitors on average. It also has the lowest percentage of visitors who choose to stay overnight:

- Share of visitors to the Surf Coast: 3%
- Visitors on average: 67k
  - Day visitors: 71%
  - Night visitors: 28%
  - International visitors: 1%

**Torquay Visitor Profile 2014-2018**
Torquay receives the second highest number of visitors and nights across all segments:

- Share of visitors to the Surf Coast: 42%
- Visitors on average: 910k
  - Day visitors: 61%
  - Night visitors: 37%
  - International visitors: 2%

*Data at this scale is less reliable when looked at in a single year-figure. To improve the reliability of data, a percentage of visitation over a five year average is used.*

**Total % of visitors by Surf Coast’s sub-regions:**

![Map of Surf Coast sub-regions with percentages]

- **Hinterland:** 3%
- **Torquay:** 42%
- **Lorne-Anglesea:** 55%
The Surf Coast continues to be one of Australia’s most popular events destinations, hosting over 200 events, festivals and markets each year. From internationally broadcast events such as the Rip Curl Pro Bells Beach and Cadel Evans Great Ocean Road Race through to mass participation sporting events, unique music and arts productions, and community activities, events play a vital role in driving visitation, creating social connections, and showcasing our region to the world.

In 2018/19, major events on the Surf Coast collectively attracted over 200,000 participants and spectators, with an estimated economic benefit to the Surf Coast region of over $100 million.

**Events on the Surf Coast**

**World-class sporting events:**
- Cadel Evans Great Ocean Road Race
- Rip Curl Pro Bells Beach

**Mass participation events:**
- Amy’s Gran Fondo
- Great Ocean Road Running Festival
- Lorne Pier to Pub
- Surf Coast Century

**Music, arts and culture:**
- Aireys Inlet Open Mic Festival
- Falls Music & Arts Festival
- Surf Coast Arts Trail

Events drive growth and enhance quality of life on the Surf Coast

They provide the opportunity to:
- Expand the economy
- Increase visitor nights
- Provide national and international exposure
- Enhance social and economic wellbeing
- Build vibrant, connected communities
- Influence off-peak visitation

**Business Events and Conferences – did you know?**

- The Great Ocean Road has the 2nd highest conference delegate visitation in regional Victoria (over 13,300 in 2016)*
- Conference delegates spend up to 3 times more than a leisure visitor.

*Source: Tourism Research Australia.

Each year the **Surf Coast** region hosts **200+** events, festivals and markets
Digital Visitation

Many visitors to the Surf Coast and Great Ocean Road region use the internet to plan and book their trip

Great Ocean Road Regional Tourism maintain the official tourism destination website, visitgreatoceanroad.org.au and associated Facebook and Instagram accounts. Below is a summary of digital visitation to these accounts in 2018.

Visit Great Ocean Road website
The website has reached a total of 393,026 users in 2018. 99% of these were new users.

- 70% of users found the website via a search engine, 12% typed the web address into their browser and 7% came from social media posts.
- The homepage was the most popular page (19%), attractions, whale sightings, Must see places and travel information were similarly popular (3%).

Visit Great Ocean Road website most popular pages:
The home page was the most popular page with 19.9% of all digital visitors going to the home page. Attractions, Whale Sightings and 13 Must See Places (Blog) are in high demand.

<table>
<thead>
<tr>
<th>Top 10 pages</th>
<th>% of total page views</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Homepage</td>
<td>19.9%</td>
</tr>
<tr>
<td>2. Attractions</td>
<td>4.0%</td>
</tr>
<tr>
<td>3. Whale Sightings</td>
<td>3.7%</td>
</tr>
<tr>
<td>4. 13 Must See Places (Blog)</td>
<td>3.6%</td>
</tr>
<tr>
<td>5. Time and Distance</td>
<td>3.2%</td>
</tr>
<tr>
<td>6. Accommodation</td>
<td>2.7%</td>
</tr>
<tr>
<td>7. Road Trips</td>
<td>2.1%</td>
</tr>
<tr>
<td>8. Getting Here</td>
<td>2.2%</td>
</tr>
<tr>
<td>9. I Am Where Stories Unfold</td>
<td>1.8%</td>
</tr>
<tr>
<td>10. Events</td>
<td>1.3%</td>
</tr>
</tbody>
</table>

Source of Digital Visitors to GOR website:

- Over 70% of visitors found the website via a search engine.
- 12% typed the web address into their browser (direct).

Destination websites in the Surf Coast
The destination websites received a total 117,739 new users.

<table>
<thead>
<tr>
<th>Destination</th>
<th>Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>Torquay Life</td>
<td>55,472</td>
</tr>
<tr>
<td>Anglesea Adventure</td>
<td>15,546</td>
</tr>
<tr>
<td>Love Lorne</td>
<td>46,721</td>
</tr>
</tbody>
</table>

\[
117,739 \text{ new users.}
\]
Tourism Research Australia's forecasts provide a ten-year view on changes in the following indicators:

- inbound arrivals, focusing on Australia's main international markets
- purpose of travel for inbound arrivals
- visitor nights and spend for international and domestic travellers
- international and domestic visitor nights in Australia’s states and territories
- outbound travel by Australian residents, and the main country they visit

Overall, national forecasts suggest that the outlook for Victoria’s tourism industry for the next few years is positive. Chinese visitation is projected to continue to grow, but at a much softer pace than previously anticipated. International visitors from the USA, UK and New Zealand are expected to grow solidly.

The lower Australian dollar will make Australia more competitive with other overseas destinations and temper outbound travel growth. The growth outlook for domestic tourism is moderate.

The forecast average annual growth from 2018-2028 for visitors to Victoria is summarised in the table below.

**Forecast Growth to 2028:**

<table>
<thead>
<tr>
<th></th>
<th>AAG 2018-2028</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Day</td>
<td>1.1%</td>
</tr>
<tr>
<td>Domestic Day expenditure</td>
<td>1.4%</td>
</tr>
<tr>
<td>Domestic Overnight Visitors</td>
<td>1.2%</td>
</tr>
<tr>
<td>Domestic Overnight Nights</td>
<td>1.5%</td>
</tr>
<tr>
<td>Domestic Overnight expenditure</td>
<td>3.4%</td>
</tr>
<tr>
<td>International Visitors</td>
<td>4.7%</td>
</tr>
<tr>
<td>International Nights</td>
<td>5.4%</td>
</tr>
<tr>
<td>International expenditure</td>
<td>7.6%</td>
</tr>
</tbody>
</table>

When we apply the average annual growth rates in visitors and expenditure to the Surf Coast, we see that by 2028:

- the total number of visitors is expected to reach 2.89m; and
- visitor expenditure will exceed $636.5m.

In the same period, visitation to the Great Ocean Road will reach 5.1 million visitors and $1.59b in expenditure.
**Forecast Tourism Visitation and Spend for Surf Coast 2018-2028:**

![Chart showing tourism visitation and expenditure trends from 2013 to 2027.]

**Positive drivers**
- Lower Australian currency value will make Australia more cost competitive relative to other international destinations and will also drive international spend growth in the coming years.
- The low Australian dollar may also soften outbound travel by Australians.
- Continued expansion in emerging Asian economies like India, Malaysia and Indonesia will drive growth in international spend from the region.
- Low interest rates and income tax offsets are expected support domestic travel growth as discretionary income levels are restored.
- Growth in the sharing economy (i.e. Airbnb) may help address supply gaps in domestic accommodation and improve the competitive pricing of the sector.

**Downside risks**
- Slower economic growth in China as the economy transitions from investment and export-led growth, to one more driven by consumption and services.
- Discretionary spend by Australians limited by sluggish wage growth.
- Domestic travel costs likely to remain high, especially for accommodation.
- Low growth in domestic air capacity could result in higher domestic airfares.
- Weakening global oil demand, trade tensions and disruptions in oil producing countries (i.e. Iran, Venezuela and Libya), may increase petrol/jet fuel prices.
- Slow growth in business and employment-related travel due to weakening global economic conditions.

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**By 2028** the total number of visitors is expected to reach **2.89 million**
Economic Development Unit

Council’s Economic Development and Tourism Unit provides a range of reports on the economy and tourism of the Surf Coast Shire including:

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

Contact the unit for business support and information.

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E: business@surfcoast.vic.gov.au