



SURF COAST SHIRE

# Visitor Insights 2018

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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 in 2017

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 SA3s 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)



# Introduction

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

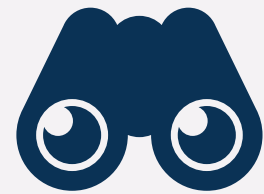
The Surf Coast Shire is located in south-western Victoria, 1.5 hours from Melbourne's CBD and 20 minutes south of Geelong's CBD. It is a tourism region renowned for its beaches, natural attractions, events and outdoor activities.

As a distinctly different economy to that of Geelong and surrounding regions, the tourism and surfing sectors playing a key role. The Surf Coast economy supports over 3,000 businesses which drive an economy estimated to be **over \$1.3 billion annually**.

**Tourism attracts more than 2.1 million visitors** directly expending over \$430 million during 2017. 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 per cent of total employment (Surf Coast's largest employment sector).

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. Many of these jobs will come from the tourism sector.



Tourism attracts more than  
**2.1 million visitors**  
directly expending over **\$430m**  
during 2017





## Summary of Visitors to the Surf Coast

The Surf Coast region received an estimated 2.1 million total visitors to the year end December 2017. The region received over 2.7 million overnight visitor nights during the same period with a direct expenditure of \$433 million. Compared to 2016 numbers are down but nights are up.



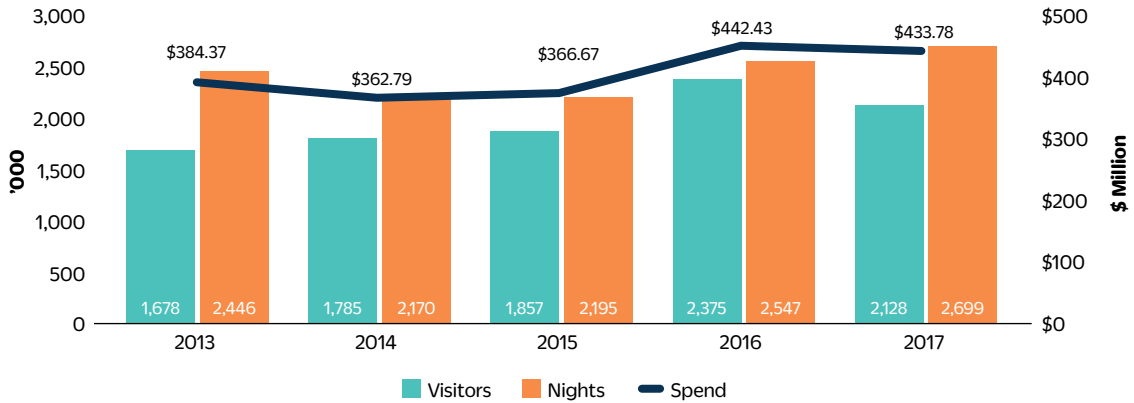
**VISITOR TYPE**

	Domestic Day	Domestic Overnight	International
	1.1 million ▼ 22%	0.9 million ▲ 7%	0.1 million ▲ 15%
	–	2.4 million ▲ 2%	0.3 million ▲ 79%
	\$95.2 million ▼ 22%	\$310 million ▲ 2%	\$28.6 million ▲ 79%

*Note: Although the data shows a large decrease in the number of domestic day visitors and a large increase in international visitor nights, 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:



## Average daily spend per visitor

Visitor type:

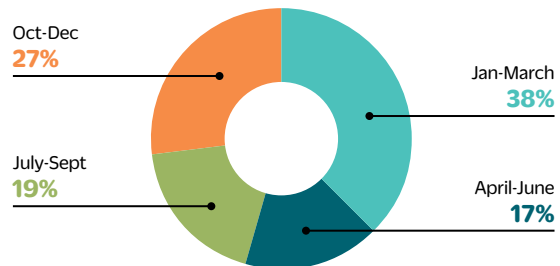
Day trip	\$84
Domestic Overnight	\$127
International	\$111

**Domestic overnight visitors spend the most money per day in the Surf Coast.**

Source: Tourism Research Australia Local Government area profiles 2016, Surf Coast. Data is based on a four year average from 2013-2016.

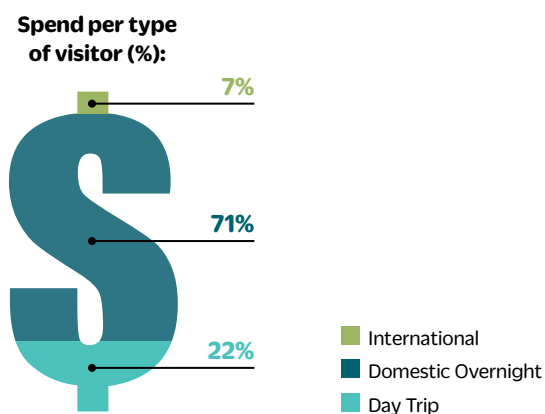
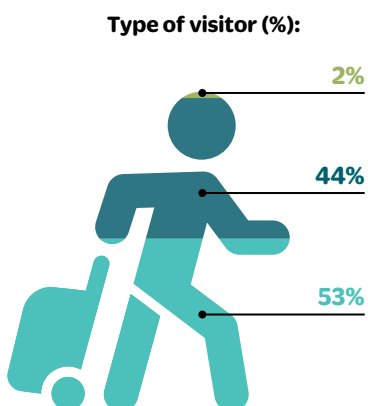
## Visitation by quarter

Spring and Summer are the most popular seasons to visit the Surf Coast. Most people (38%) visit in between January to March. October to December is the second most popular time to visit 27%.



## Type of visitor by %

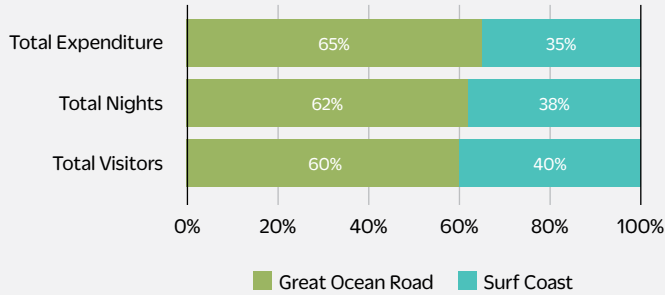
Most of the visitors to the Surf Coast are day trippers (53%). However, 71% of the tourism expenditure is from domestic overnight visitors.



# Regional Competition

## Surf Coast market share of the Great Ocean Road

Tourism on the Surf Coast compared to the Great Ocean Road:



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

**40%** of all visitation

**38%** of all nights

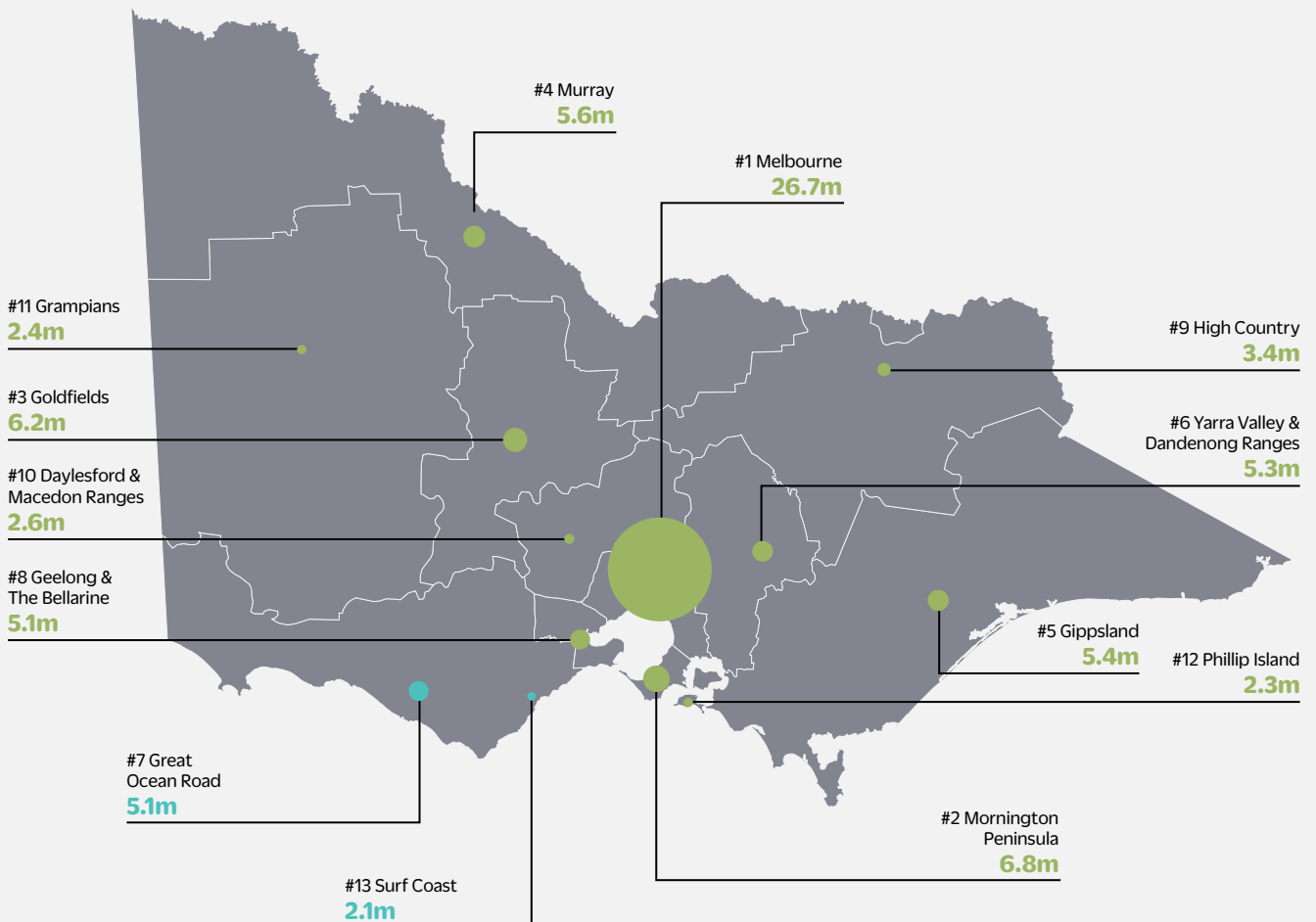
**35%** of all expenditure

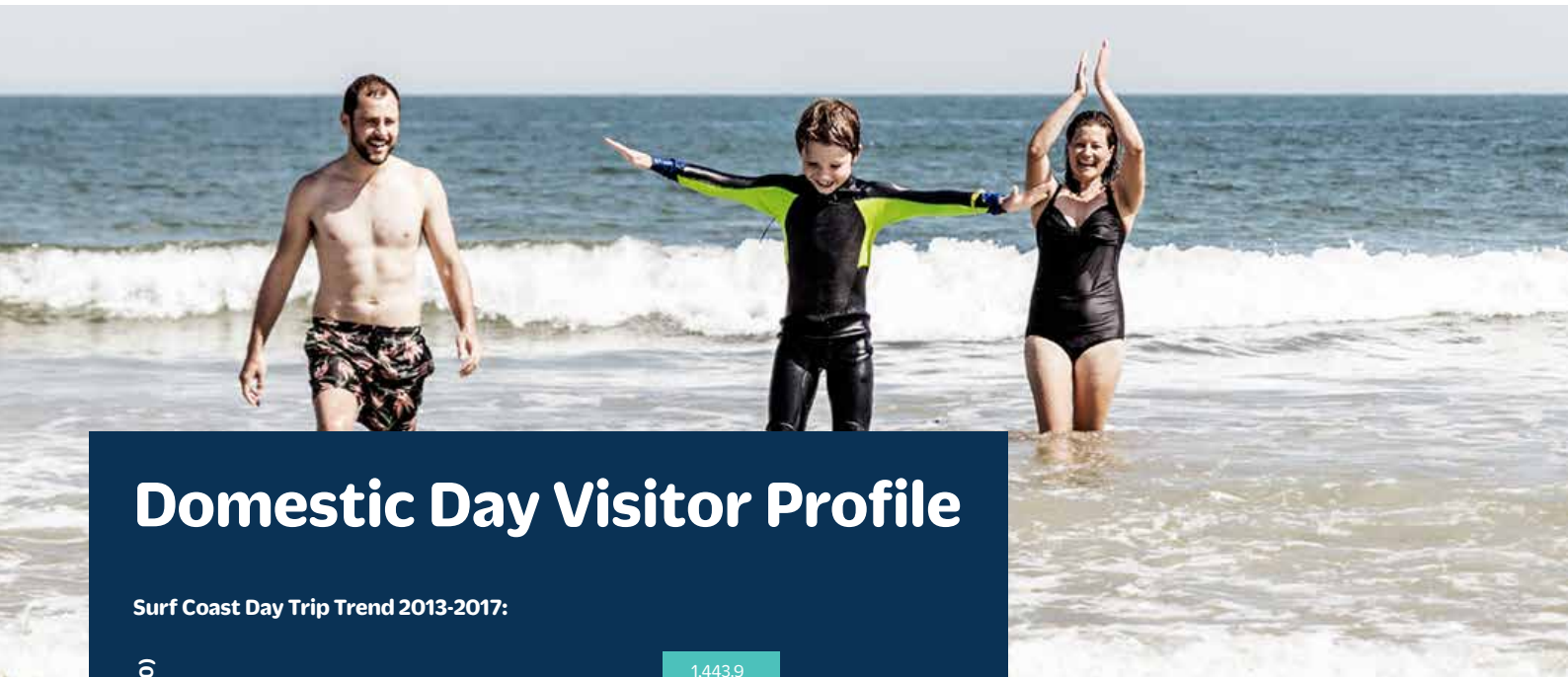
Only 23% of international overnight visitors to the Great Ocean Road stay overnight in the Surf Coast.

## Victorian Tourism Region Comparison Analysis

In 2017, 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 show a similar level of visitation as Phillip Island (2.3m).

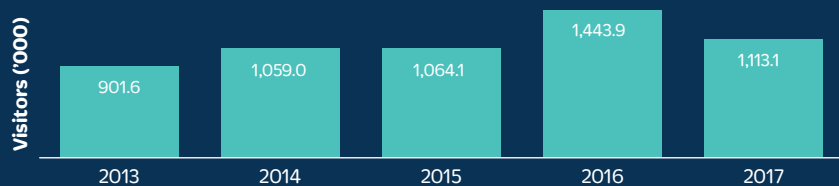
Domestic Day and Overnight Visits by tourism region:





# Domestic Day Visitor Profile

Surf Coast Day Trip Trend 2013-2017:



The Surf Coast received 1.133 million day trip visitors in 2017. While this is down by 22% from 2016, the five year trend shows an increase of 26%. Day trip visitors spent \$95.2 million in the Surf Coast last year. This represents 22% of total visitor expenditure.

## Income

\$85,000-\$99,999	29%
\$100,000-\$114,999	25%

## Favourite activities

Go to the beach	37%
Eat out at a restaurant and/or café	30%
Sightseeing/looking around	14%
Visit friends & relatives	8%
Go shopping for pleasure	6%
Surfing	6%

## Reason for trip

Holiday	78%
Visiting friends & relatives	12%
Business	5%
Other reason	4%

## Favourite day to visit

Sunday	31%
Saturday	30%
Monday	9%
Thursday	9%
Tuesday	9%
Wednesday	7%
Friday	5%

## Favourite month to visit

January	25%
November	12%
March	11%
August	9%
October	8%
December	7%
February	6%
April	5%
September	5%
May	4%
July	4%
June	3%

## Age group

55+	24%
30-34	18%
20-24	15%
25-29	14%
45-49	7%

## Employment status

Working full time	50%
Working part time	27%
Retired or on a pension	18%

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

My favourite things to do are going to the beach (37%), eating out (30%) and exploring new places with friends (22%). Sometimes I like to go shopping or surfing (6%).

I earn around \$100,00 per year and have a budget of \$84 to spend for the day.

I mainly come to find that holiday feel (78%). My friends and family draw me back (12%).

I'm most likely to be in my mid 20s-30s (46%). And to have a partner (59%). I may have a child under five (17%).

I work full time or part time (77%).

I love to head down to the Surf Coast in January (25%). March (11%) and November (12%) are pretty good too. I don't like to come in June (3%).

Most of the time I come on the weekend (61%). Sometimes I like to come around on Monday or Thursday (9%). I don't like to visit on Friday (5%).

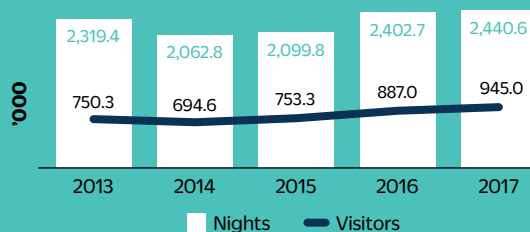
I'm most likely to come from Geelong. I may come from the surrounding area (Bellarine, Colac, Ballarat, Werribee, Ocean Grove, Colac or from Melbourne (Brunswick, Essendon, St Kilda, Williamstown, South Yarra).



# Domestic Overnight Visitor Profile

The Surf Coast received 945,000 domestic overnight visitors in 2017, an increase of 7% on 2016 and 26% over the last five years. Overnight stays increased by 2% on 2016 and 5% average growth over the last five years. The average length of stay has dropped from 3.1 nights to 2.6 nights in five years. These visitors spent \$309.95m last year and represent 71% of all expenditure on the Surf Coast.

Domestic Overnight Visitor Trend 2013-2017:



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



### Income

\$55k-\$130k	40%
\$130k +	44%

Note: 21% earn over \$200k

### Purpose of visit

Holiday	69%
Visiting friends and relatives	23%
Business	7%
Other reason	1%

### Top 10 activities

Go to the beach	71%
Eat out at a restaurant or café	61%
Visit friends & relatives	34%
Sightseeing	33%
Go to Pubs, clubs	24%
Bushwalking	22%
Visit national parks	17%
Go shopping for pleasure	16%
Surfing	12%
Go to markets	9%

### Accommodation preference

Private	52%
Commercial	47%

### Commercial accommodation preference

Rented house or apartment (not serviced daily)	29%
Luxury hotel or resort (4 or 5 star)	25%
Standard hotel/motor inn (< 4 star)	14%
Caravan park – cabin	13%

### Preferred transport to the region

Private vehicle or company car	93%
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### Length of stay

2 nights	39%
1 night	30%
3 nights	14%
4 nights	6%
5 nights	4%

### Employment status

Working full time	46%
Working part time	25%
Retired or on a pension	17%
Studying	7%

### Age group

55+	33%
20-24	13%
50-54	11%
40-44	9%

### Travel party type

Adult couple	31%
Friends or relatives travelling together (without children)	27%
Travelling alone	17%
Family group (parents & children)	15%

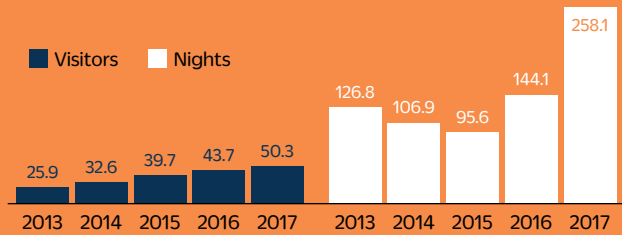
### Day of week returned from trip

Sunday	40%
Monday	14%
Saturday	13%
Friday	11%
Wednesday	8%
Tuesday	7%
Thursday	6%

# International Visitor Profile

The Surf Coast received 50,300 visitors in 2017, an increase of 15% from 2016. Since 2013, there has been 95% growth in international visitor nights. This finding is statistically significant at a 95% confidence level. International visitor nights increased by 79% from 2016 and by 104% over a five year trend. The average length of stay has increased slightly from 4.9 to 5.1 nights since 2013. These visitors spent \$28,648 last year and represent only 7% of all expenditure on the Surf Coast.

International Visitor Trend 2013-2017:



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



### Purpose of visit

Holiday	87%
Visiting friends & relatives	10%
Business	2%
Employment	1%
Education	<1%

### Age group

55+	25%
25-29	18%
20-24	12%
50-54	11%
30-34	10%
45-49	9%
35-39	8%
40-44	6%
15-19	1%

### Activities

Eat out at a restaurant and/or café	97%
Go to the beach	92%
Sightseeing/looking around	90%
Go shopping for pleasure	83%
Visit national parks/state parks	82%
Go to markets	67%

### Transport

Rental car	43%
Private vehicle or company car	25%
Self-drive motorhome or campervan	9%

Note: Only 3% of international overnight visitors come to the Surf Coast by tour bus.

### Stopover order

2nd stopover	32%
3rd stopover	17%
1st stopover	16%

### Country of origin

China (excl SARs & Taiwan province)	13%
England	12%
Germany	10%
United States of America	9%
New Zealand	8%

### Accommodation preference

Commercial	72%
Private	28%

### Commercial accommodation preference

Standard hotel/motor inn (<4 star)	31%
Caravan park (travelling with a motor home or campervan)	16%
Caravan park (camping)	11%
Backpacker or hostel	10%
Rented house/apartment/flat or unit (not serviced daily)	8%

### Planning the visit

Internet	61%
Friend or relative living in Australia	33%
Previous visit(s)	21%
Travel book or guide	21%
Friend or relative who visited Australia	12%

### Travel party type

Unaccompanied traveller	39%
Adult couple	30%
Friends and/or relatives travelling together	15%
Family group (parents & children)	15%
Business associates	1%

### City of arrival

Melbourne	60%
Sydney	22%
Brisbane	8%

### Number of previous visits

No previous visit	48%
1	19%
2	8%

### Arrived on a group tour

Non package tour	94%
Package tour	6%



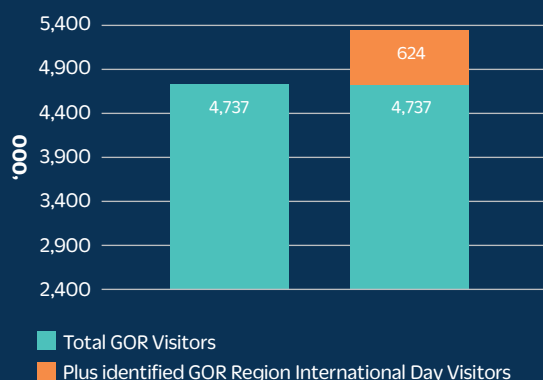
## International day trip visitors

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.

The data shows that:

- On average 624,000 international visitors come to the Great Ocean Road on a day trip
- There are 3.5 times more international day visitors than international overnight visitors coming to the Great Ocean Road region
- International day visitors are the third largest market in terms of visitor numbers (13%), following domestic day visitors (48%) and domestic overnight visitors (37%) respectively.

Average Annual GOR Visitors 2013-2017:



It should be noted this data is generally not reported due to limitations of the international visitor survey questions and hasn't been added to the total visitation in other areas of this publication.



International day visitors are the 3rd largest market in terms of numbers

# 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 2017:

	Torquay VIC	Lorne VIC	Anglesea VIC	Winchelsea VIC
Walk-in enquiries	67,916	146,389	15,966	1,004
Phone enquiries	9,242	8,817	-	-

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 Centres 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 2017** the Visitor Centres engaged **249,334** 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.

## Lorne-Anglesea

Lorne-Anglesea receives the most visitors overall and has the highest number of overnight stays:

Share of visitors to the Surf Coast	<b>54%</b>
Visitors on average	<b>1.07m</b>
• Day visitors	<b>53%</b>
• Night visitors	<b>45%</b>
• International visitors	<b>2%</b>

## Torquay

Torquay receives the second highest number of visitors and more day trips:

Share of visitors to the Surf Coast	<b>42%</b>
Visitors on average	<b>829.1k</b>
• Day visitors	<b>61%</b>
• Night visitors	<b>38%</b>
• International visitors	<b>2%</b>

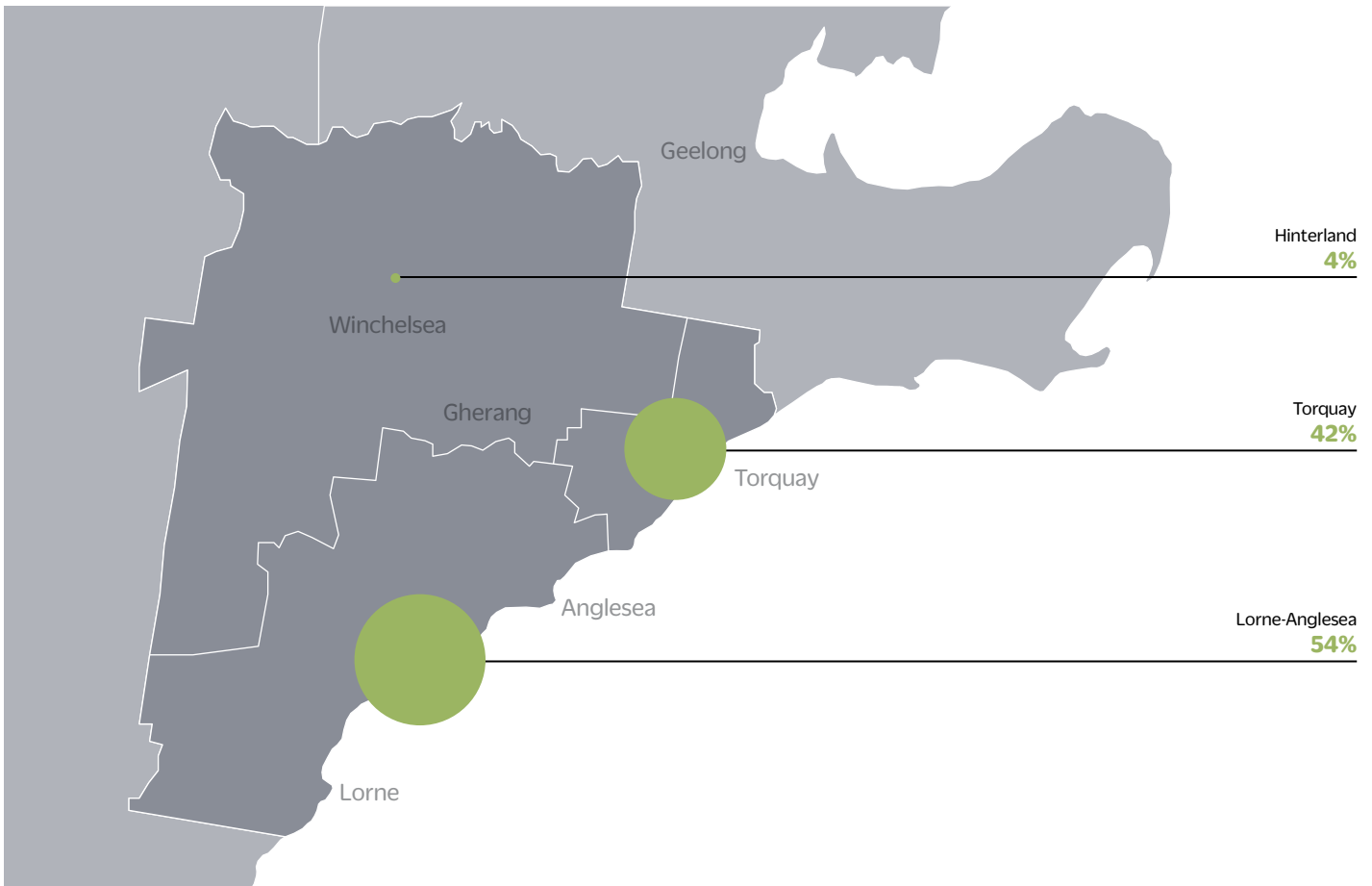
## Hinterland

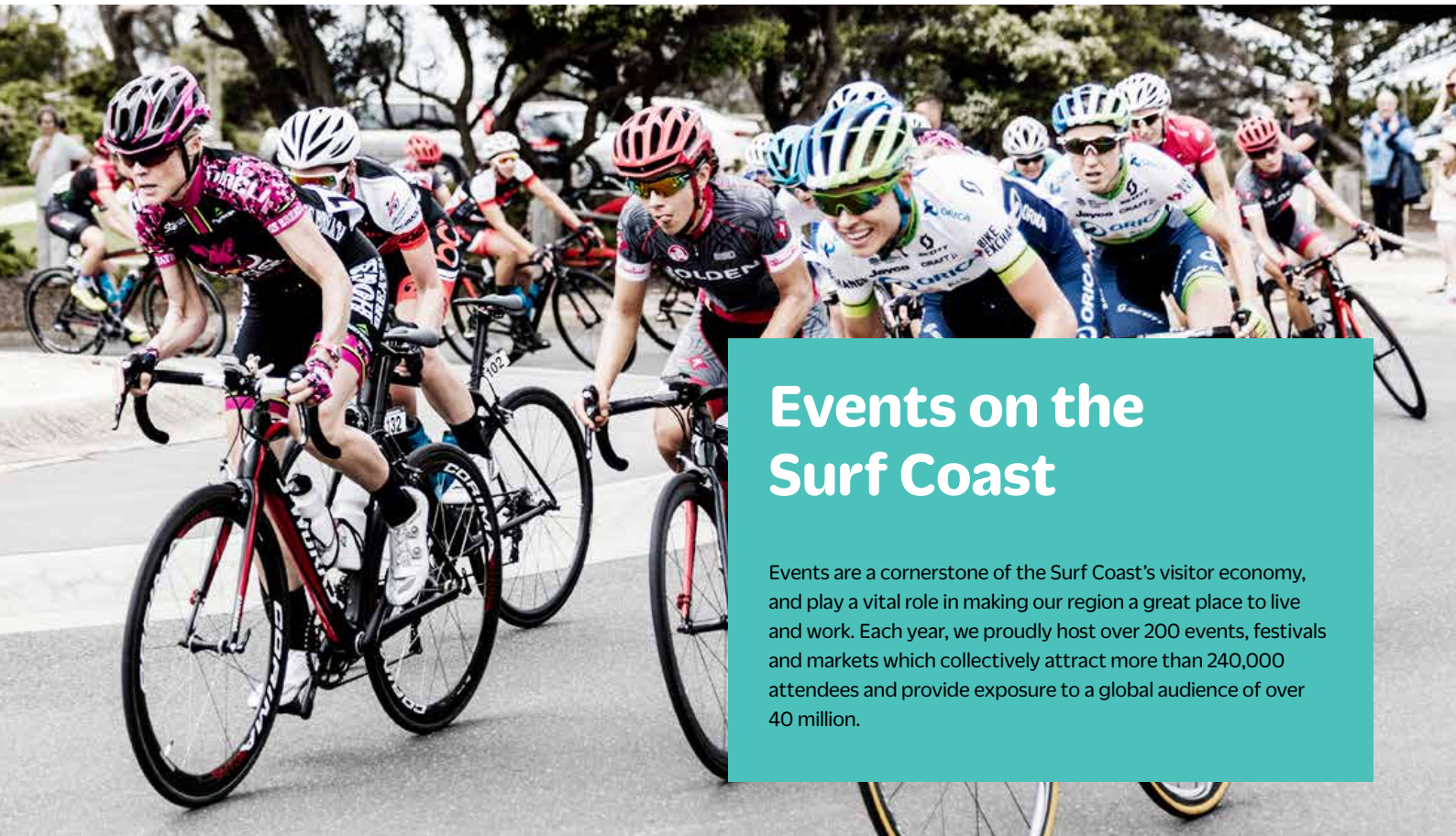
The Hinterland receives the fewest number of visitors on average and the highest number of day trips:

Share of visitors to the Surf Coast	<b>4%</b>
Visitors on average	<b>71.3k</b>
• Day visitors	<b>72%</b>
• Night visitors	<b>27%</b>
• International visitors	<b>1%</b>

*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:





## Events on the Surf Coast

Events are a cornerstone of the Surf Coast's visitor economy, and play a vital role in making our region a great place to live and work. Each year, we proudly host over 200 events, festivals and markets which collectively attract more than 240,000 attendees and provide exposure to a global audience of over 40 million.

**200+** events, festivals and markets

**240,000+** attendees

Global audience of **40 million+**

### World-class sporting events:

- Cadel Evans Great Ocean Road Race
- Rip Curl Pro Bells Beach

### Mass participation events:

- Amy's Gran Fondo
- Lorne Pier to Pub
- Surf Coast Century

### Music, arts and culture:

- Aireys Inlet Open Mic Festival
- Falls Music and Arts Festival
- Lorne's Festival of Performing Arts
- 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 three 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](http://visitgreatoceanroad.org.au) and associated Facebook and Instagram accounts. Below is a summary of digital visitation to these accounts in 2017.

The website has reached a total of **1.18 million** potential visitors in 2017.

This includes visitors to the following destination websites and social media pages:



### Visit Great Ocean Road Website:

**1,064,872** unique visitors

Source: 80% search, 12% typing the web address, 6% referral from another website.



### Facebook:

**33,243** likes

**2,712,056** reach



### Destination Websites:

I am Torquay  
Anglesea Adventure  
Love Lorne\* } **30,738**

\*Since December 2017.



### Instagram:

**53,800** followers

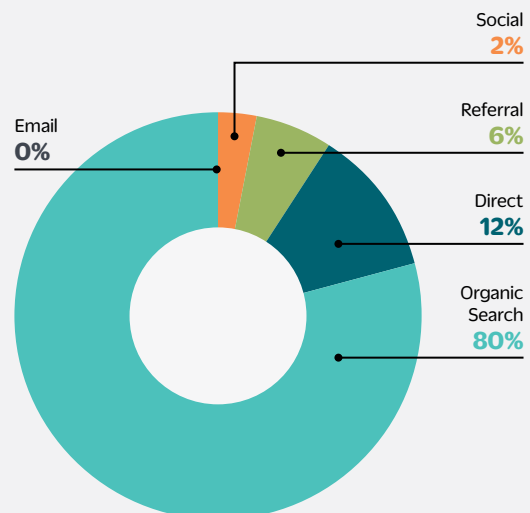
**2,200,000** reach

## Visit Great Ocean Road website most popular pages

The home page was the most popular page with 27% of all digital visitors going to the home page. Attractions, accommodation and itineraries are in high demand. Lorne was the only town to feature in the top 10 pages.

Top 10 page visits		Unique page views	% of total page views
1.	Home Page	288,444	27.09
2.	Attractions	68,187	6.40
3.	Accommodation	46,385	4.36
4.	Getting Here	45,431	4.27
5.	3 Day Itineraries	26,038	2.45
6.	Whale Sightings	19,940	1.87
7.	Camping	19,485	1.83
8.	3 Day Itineraries (the essentials)	19,157	1.80
9.	Towns & Villages (Lorne)	18,335	1.72
10.	Towns & Villages	16,447	1.54

### Source of Digital Visitors:



Over 80% of visitors found the website via a search engine. 11.9% typed the web address into their browser (direct).

# Future Visitation

Tourism Research Australia released Tourism Forecasts 2017 on 2 August 2017. Overall, the outlook for Australia's tourism industry for the next few years is positive, influenced by an improving outlook for the global economy.

This global growth is underpinned by increasing consumer confidence and an upturn of business investment in major advanced economies such as the US, Japan, the UK and Canada, and by continued strong growth in emerging Asian economies like China, India and Indonesia.

The forecast average annual growth from 2016-2027 for visitors to Victoria is summarised below.

### Forecast Growth to 2027:

Domestic Day	▲ 2.9%
Domestic Visitors	▲ 2.4%
Domestic Nights	▲ 2.7%
International Visitors	▲ 6.5%
International Nights	▲ 6.2%

When we apply the average annual growth rates in visitors and expenditure to the Surf Coast, we see that by 2027:

- the total number of visitors is expected to reach 2.8 million; and
- visitor expenditure will exceed \$583 million.

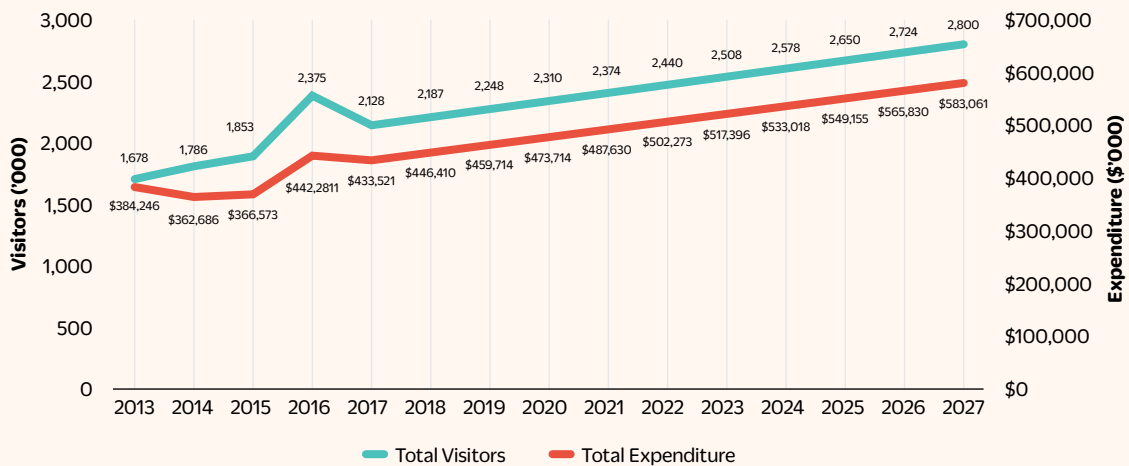
In the same period, visitation to the Great Ocean Road will reach 7.02 million visitors and \$1.59 billion in expenditure.

### China is set to become our largest international market

In 2018 China is expected to overtake New Zealand to become the largest source of international visitors. By 2027, the number of Chinese international visitors will exceed New Zealand (2nd largest market) on a 2:1 ratio.

By 2027 the total number of visitors will reach **2.8 million** and visitor expenditure will exceed **\$583 million**

Forecast Tourism Visitation and Spend for Surf Coast 2017-2027:



In 2018 **China** is set to become our largest **international** market



## **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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