The Surf Coast Tourism System
By Ryan Jopp

The Surf Coast Shire receives more than 1.3 million visitors each year (Tourism Alliance Victoria, 2008); in 2006 this equated to $258 million in tourist expenditure (Geelong Otway Tourism, 2007). This expenditure is estimated to directly support 800 full-time and part-time jobs, and indirectly support up to 1040 jobs (ibid).

The Surf Coast Shire includes a major section of the Great Ocean Road (GOR), and the region is the fastest growing tourism region in Victoria, outside Metropolitan Melbourne (www.parkweb.vic.gov.au, 2009). The region receives over 8 million visitors per year including 5.3 million day trippers (EC3, 2008). For the year ending December 2008 the GOR received 2.4 million domestic overnight visitors, and 150,500 international overnight visitors (Tourism Victoria, 2009). This represents a 15% share of total visitors to Victoria and 11% of total visitor nights (EC3, 2008). However, the GOR as a destination is a product constructed from a composite of interconnected elements brought together by a variety of stakeholders, all of which will be impacted – directly and indirectly - by climate-induced changes, fluctuations in resource availability and multi-scaled responses to these changes. The next section outlines the main components of the wider Surf Coast tourism system.

Every tourism system comprises the following five basic elements (Leiper, 2004):

1. **Tourists** – the essential human element;
2. **Tourist-generating Regions (TGRs)** – geographical place where a tourist’s trip begins and usually ends;
3. **Tourist Destination Regions (TDRs)** – geographical places where a tourist’s main visiting activity occurs;
4. **Transit Route Region** – transit routes and infrastructure tourists use to travel between tourist-generating Regions and Tourist Destination Regions; and
5. **Tourism Industries** – collection of organisations and businesses that facilitate the creation, management and delivery of the purchased tourism product.

### 3.1 The tourist

Of the 1.3 million domestic visitors to the Surf Coast in 2006 approximately 50% were male, with 50.6% of domestic day visitors and 48.4% of domestic overnight visitors being male (Geelong Otway Tourism, 2007). The vast majority of domestic visitors to the Surf Coast, both day visitors (45.6%) and overnight visitors (34.9%) were 25-44 years old. Figure 2 provides a comparison of domestic visitors by age.
The main purpose of visit for both domestic and international visitors was holiday and leisure; noticeably these figures are significantly higher than the state average. A comparison of the purpose of visit for domestic and international visitors to the Surf Coast and visitors to Victoria in general is provided in Figure 3.
A Surf Coast Shire Study completed by Hossain and Barry (2003) asked international visitors what activities they engaged in during their visit to Australia in general compared with the Surf Coast specifically. Interestingly, this study found that international visitors to the Surf Coast were much more likely to visit National/State Parks, visit friends and relatives, experience aboriginal art/craft and cultural displays, and undertake bushwalking/rainforest walks. A more recent report by Tourism Victoria (2009) compared visitors to regional Victoria with visitors to the Great Ocean Road region. Both domestic and international visitors to the Great Ocean Road region were found far more likely to ‘go to the beach’ and ‘go surfing’, confirming the importance of the coastal aspects of the destination. Figure 3 illustrates the activities engaged in by both domestic and international visitors to the Great Ocean Road region, compared with visitors to regional Victoria in general.

Figure 4: Activities engaged in by visitors to Regional Victoria and the Great Ocean Road region.

![Activities of Tourists](image)

Source: Adapted from: (Geelong Otway Tourism, 2007)

### 3.2 Tourist Generating Regions (TGRs)

In 2006 the Surf Coast attracted 1,352,000 domestic tourists (including 802,000 day visitors and 550,000 domestic overnight visitors) and 28,400 international visitors (Geelong Otway Tourism, 2007). This represented 2.5% of Victoria’s day visitors, 3.2% of Victoria’s domestic overnight visitors, and 2% of international overnight visitors (*ibid*).

The vast majority of domestic visitors were from intrastate, with 86% of overnight visitors to the Surf Coast originating in Victoria (Geelong Otway Tourism, 2007). Figure 3 shows that the domestic market dominates visitor levels for the entire Great Ocean Road region, with 81% of visitors coming from Victoria and a further 13% from interstate. Only 6% of GOR visitors are from overseas (Tourism Victoria, 2009).
Melbourne remained the GOR region's largest source market, representing 48% of domestic visitors (Great Ocean Road Australia, 2006). The largest source markets outside Victoria, were New South Wales (40%), South Australia (29%), and Queensland (19%) (EC3, 2008). Tourism Victoria forecasts further growth from the domestic market; 26% of Victorians and 11% of Australians living outside of Victoria indicate that they would like to visit the region in the next two years (Tourism Victoria, 2009).

The main international tourist generating regions (TGRs) for the Surf Coast in 2006 were the United Kingdom (32.5%) followed closely by Europe (28%) (Geelong Otway Tourism, 2007). Other key markets included North America (13%), Asia (14%) and New Zealand (9%) (ibid).

Figure 4 compares international TGRs for the Surf Coast and the entire Great Ocean Road region. Although the figures are similar overall, it is interesting to note that the top two TGRs are reversed for these two markets, with the Surf Coast receiving substantially more tourists from the United Kingdom than the entire Great Ocean Road region.

**Figure 5: Main Tourist Generating Regions for the Great Ocean Road region.**

---

Source: Adapted from: (Geelong Otway Tourism, 2007, Tourism Victoria, 2009)
3.3 Tourist Destination Region (TDR)

Victoria's Surf Coast Shire is located on the west coast of Victoria and incorporates part of the world famous Great Ocean Road. The region includes spectacular coastline, scenic rainforests and magnificent beaches, and is one of the major tourist draw cards of Australia. It covers an area of 1,560 km², from Torquay in the East to Lorne in the West, and features numerous seaside and inland towns (Surf Coast Shire, 2008). The iconic coastline is a popular touring route, and is complemented by rural and forested areas. The region offers a range of touristic activities from surfing to bushwalking, as well as a full range of accommodation options.

Major Regional Towns:

Torquay

Torquay is the largest town in the Surf Coast Shire and marks the official start of the Great Ocean Road. It is a world renowned surf destination, and the birthplace of major surf companies such as Rip Curl and Quiksilver, and home to the Surf World museum. Torquay is around 20 kilometres from the city of Geelong.

- Population: 8,003
- Area: 11.8 sq km

Key Attractions:

- Bells Beach - This is a world renowned surfing destination and home to the longest continuously running surf competition the Rip Curl Pro. The event is held every Easter long weekend and is combines surfing with a music festival.
- Surf World Museum
- Surf City Plaza – A surf shopping district offering everything related to surf culture and fashion.
- Golf
- Fishing
- Beaches

Anglesea

Anglesea is renowned for its abundant wildlife, particularly the kangaroos, which can often be found on the golf course. The area provides for an array of coastal activities, such as swimming and surfing, but is also surrounded by State park and bushland making it popular for walking, horse riding and mountain biking. Anglesea is on the Great Ocean Road and Bass Strait, around 35km from Geelong.

- Population: 2,203
- Area: 7.2 sq km

Key Attractions:

- Anglesea Golf Course
- Paddle Boats
- Beach Horse Riding
- Surfing
- Galleries
Beaches

Aireys Inlet
Offers secluded beaches, walks in the wilderness, a great pub with a fabulous view, and an array of restaurants. Aireys Inlet is one of the coast's oldest settlements, and is home to the Split Point Lighthouse.

Population: 1,033
Area: 9.3 sq km

Key Attractions:
- Split Point Lighthouse
- Beaches
- Bush & Clifftop Walks
- Surfing

Fairhaven
Fairhaven adjoins Aireys Inlet to the west of the Painkalac Creek, on the Great Ocean Road. Since major bushfires in 1983, Fairhaven has grown rapidly. Overlooking Fairhaven beach, this pretty beach town has views of the Aireys Inlet river valley and the Split Point Lighthouse to the east and the mauve blue hills of Mt St George and Cape Patton to the west.

Population: 1,033
Area: 9.3 sq km

Key Attractions:
- Great Otway National Park
- Beaches
- Distillery Creek Picnic Ground
- Walking tracks

Lorne
Set between the waters of Loutit Bay and forests of the Otway Ranges, Lorne is one of the coast's most popular tourist destinations. There is a sheltered 2km beach surrounded by lawn and picnic areas, an array of shops and cafes, and a range of accommodation options. Inland is the Otway forest, flush with tree ferns, sparkling brooks and waterfalls. Lorne is around 70km south west of Geelong on the Great Ocean Road and situated on a protected bay overlooking Bass Strait.

Population: 1,216
Area: 5.4 sq km

Key Attractions:
- Beaches
- Shops and cafes
- Sculpture park
- Waterfalls
Winchelsea

Winchelsea is an attractive rural town by the banks of the Barwon River. There are many historic buildings and a heritage trail that encompasses the town’s older buildings and other points of interest.

Population: 1,101
Area: 3.9 sq km

Key Attractions:
- Heritage trail
- Barwon Park Historic Homestead
- Barwon River
- Fishing

Other Attractions

Great Otway National Park

Some of Australia’s best rainforest scenery can be found in the Great Otway National Park behind Lorne and Apollo Bay. Walk among tall trees and giant tree ferns at Maits Rest, see ancient and intricate plant life, lush ferns and mosses at Melba Gully or experience the full beauty of the rainforest on the Otway Fly tree top walk.

Discover high waterfalls in its narrow valleys, ranging from the impressive Triplet Falls to secluded falls over fern-fringed pools. Dramatic cliffs and secluded beaches can also be found along the shore. Visit wild Johanna Beach where towering cliffs frame the pristine sandy beach or the isolated and incredibly beautiful Blanket Bay. Another highlight along the coast is the Gable Lookout offering stunning views back to Moonlight Head (www.visitvictoria.com 2009).

The Great Otway National Park incorporates the former Otway National Park and Angahook-Lorne, Carlisle and Melba Gully State Parks, as well as areas of state forest and other crown land. The new national park covers 103,000 hectares, an increase in park area of more than 60,000 hectares (www.parkweb.vic.gov.au 2009).

This park represents all that is special about the Otways: the tall wet forests, ancient rainforests, the drier forests of the inland slopes and the very diverse heathlands and woodlands, fringed by a spectacularly rugged coastline and studded with some of Victoria’s most striking waterfalls and other attractions (www.parkweb.vic.gov.au 2009).

The Falls Festival

The Falls Festival is a major musical and cultural event held between the 29th of December and the 1st of January every year since 1993. It is situated in farmland just north of Lorne, and is surrounded by the beautiful Otway ranges. Although music is the major focus of the event, it also incorporated local arts and culture.
3.4 Transit Route Region (TRR)

Visitors travel to and from the Surf Coast region by bus, train or car. Proximity to Melbourne, and its airports, along with good roads and reasonably frequent trains and buses make the Surf Coast an easy place to travel to and from. Travel time from Melbourne to the shire’s first major town, Torquay, is about one and a half hours by most modes of transport.

The Great Ocean Road is not only the major attraction for the Great Ocean Road region, but it is a major part of the transportation infrastructure for the region. The Great Ocean Road (GOR) is in a unique position of not only being a major attraction in itself, but it also provides access to the many locations, and attractions throughout the region. On top of this the road itself provides the means for one of the most popular activities of all; touring the Great Ocean Road!

Work officially started on the Great Ocean Road on 19th September 1919 and the 75 kilometre stretch between Anglesea and Apollo Bay was completed by 1932 (Great Ocean Road Australia, 2009). Today the GOR officially starts at Torquay and finishes at Allansford near Warrnambool (Great Ocean Road Australia, 2009). The journey without stopping takes around 3.5 hours and covers some 243 kilometres (Great Ocean Road Australia, 2009).

The Great Ocean Road also forms part of the Great Southern Touring Route which is a circular route incorporating the Grampians, Warrnambool, and Ballarat. Roads provide the lifeblood for tourism in the GOR both directly and indirectly. For tourists, a drive, whether it be in a coach, car, or on a motorcycle is often a major reason for choosing a holiday in the region. Whilst for those in the tourism industry, the road represents not only access for potential tourists, but access for suppliers of essential goods. Below is a brief description of the transportation infrastructure available for accessing the Surf Coast Shire.

**Plane** – There are no commercial flights into airports along the Great Ocean Road. The closest international airport is the Melbourne International Airport at Tullamarine. Avalon Airport near Geelong is the closest major airport to the Surf Coast Shire, and receives interstate visitors. Sharps Airlines also fly into Portland in Western Victoria, from Melbourne and Adelaide and other regional airports in Victoria and South Australia. This enables access to the western end of the Great Ocean Road, giving tourists the opportunity to travel east towards the Surf Coast Shire.

**Train** – V-Line has a train route running from Melbourne to Geelong; however there are no connecting services to major destinations throughout the Surf Coast Shire (i.e. Torquay or Lorne). Trips from Melbourne (Southern Cross Station) to Geelong (Railway Terrace) cost $9.20 one-way (full-fare, peak, economy). There is also an overland train from Melbourne to Warrnambool that runs three times a day Monday to Saturday, and twice on Sundays (cost: approximately $26). This again enables visitors to access the Surf Coast via the western section of the Great Ocean Road.

**Bus/Coach** – V-Line operates train and coach trips from Melbourne stopping at all the major coastal towns along the Great Ocean Road, including Torquay, Anglesea and
Lorne. A train is commonly used to travel to Geelong, where passengers are then transferred to a coach for the remainder of the trip.

**Boat/Ship** – There are no commercial boat or ship carriers departing or arriving at major destinations along the GOR. However, tourists may wish to use the passenger ferry that operates between Sorrento and Queenscliff, in order to access or depart the Mornington Peninsula. The ferry operates every hour and Queenscliff is located only a short drive (about 1 hour) from Torquay and the start of the Great Ocean Road.

### 3.4 Tourism Industries, Marketing and Management

The Surf Coast Shire is one of several shires throughout the Great Ocean Road region, including Colac-Otway Shire, Corangamite Shire, and Moyne Shire. Local Government Acts empower local shires to deal with development generally, and tourism development in particular (Hall et al., 1997). Local governments can control development of accommodation, attractions, amenities, and other tourism infrastructure in their locality, largely through local zoning and development schemes. Clearly, local government can play a pivotal role in tourism development through infrastructure planning, service provision, and marketing of local attractions.

The Surf Coast also has a local tourism association (LTA) whose main roles are to develop and maintain local tourism facilities, and develop local marketing campaigns. Such campaigns are developed in conjunction with regional tourism associations (RTAs) and the local shire government. Surf Coast Tourism sits under Geelong-Otway Tourism as the RTA.

The Surf Coast also has several smaller tourism and trader associations that support and represent local destinations, for example, the Lorne Business & Tourism Association. These local tourism associations often lobby local and regional tourism associations for funding, and often represent their town on LTA boards.

The structure and governance of tourism in the region is complex, and the following sections can only provide an overview of the roles and responsibilities of each organisation in the development of tourism. In order to have an integrated and effective tourism system it is imperative that duties of each stakeholder are clear, and that organisations work together to develop a sustainable tourism product. Many of the organisations mentioned perform a range of management and marketing duties, and the interrelationships between various players can be complex. The following table provides a summary of the organisations involved, both directly and indirectly, in the marketing and management of the Surf Coast region, and outlines their key roles and responsibilities.
Table 1: Key roles and responsibilities of organisations involved in the marketing and management of the Surf Coast Region.

<table>
<thead>
<tr>
<th>Organisation</th>
<th>Key Roles &amp; Responsibilities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Australia (TA)</td>
<td>Marketing and promotion of Australia to the world.</td>
</tr>
<tr>
<td>Tourism and Transport Forum (TTF)</td>
<td>Peak national advocacy body representing the tourism, transport, aviation and investment sectors.</td>
</tr>
<tr>
<td>Department of Innovation, Industry and Regional Development (DIIRD)</td>
<td>Victorian Government's lead agency for economic and regional development. Guides tourism policy and planning for the state.</td>
</tr>
<tr>
<td>Tourism Victoria (TV)</td>
<td>Promotion of State-wide tourism both domestically and internationally.</td>
</tr>
<tr>
<td>Department of Sustainability &amp; Environment (DSE)</td>
<td>Sustainably manage water resources and catchments, climate change, bushfires, parks and other public land, forests, biodiversity and ecosystem conservation.</td>
</tr>
<tr>
<td>Parks Victoria (PV)</td>
<td>Tourism policy, planning and implementation, monitoring and research, and development and support of tourism initiatives and products</td>
</tr>
<tr>
<td>Tourism Alliance Victoria (TAV)</td>
<td>Represent the interests of the states tourism industry, including tourism operators and RTA’s. Work closely with Tourism Victoria.</td>
</tr>
<tr>
<td>Victorian Coastal Council (VCC)</td>
<td>Undertake state-wide strategic coastal planning. Facilitate the operation of the Regional Coastal Boards. Coordinate the implementation of the Victorian Coastal Strategy and Coastal Action Plans</td>
</tr>
<tr>
<td>Victorian Tourism Industry Council (VTIC)</td>
<td>Represent the State’s tourism industry to the State Government. Provide industry leadership, and raise the profile of tourism in both the public and private sector.</td>
</tr>
<tr>
<td>Great Ocean Road Marketing (GORM)</td>
<td>Promote the GOR region, increase tourist visitation, length of stay, and expenditure.</td>
</tr>
<tr>
<td>Great Ocean Road Coastal Committee (GORCC)</td>
<td>Management of coastal areas along GOR.</td>
</tr>
<tr>
<td>Great Southern Touring Route (GSTR)</td>
<td>Promote the Great Southern Touring Route to select target markets. Increase visitation to the region.</td>
</tr>
<tr>
<td>G21</td>
<td>Build regions capacity for tourism development.</td>
</tr>
<tr>
<td>Surf Coast Shire Council</td>
<td>Manage information centres, and other tourist amenities. Involved in tourism marketing and planning, and infrastructure maintenance and development.</td>
</tr>
<tr>
<td>Geelong-Otway Tourism (RTA)</td>
<td>Represent regional issues of the tourism industry. Work with Tourism Victoria and relevant LTA’s.</td>
</tr>
<tr>
<td>Surf Coast Tourism (LTA)</td>
<td>Develop and maintain local tourism facilities. Develop local marketing campaigns with RTA’s.</td>
</tr>
</tbody>
</table>
Figure 7 provides a graphical representation of each stakeholder within the tourism structure of the Surf Coast region, and clarifies whether their focus is primarily on policy development and planning or on marketing and promotion of the region. Also presented are the direct and indirect connections between various stakeholders. Direct relationships represent a collaborative approach to either marketing or policy and planning, where the degree of communication and cooperation is relatively high. Indirect relationships represent a situation whereby stakeholders work together on certain elements of marketing, or policy and planning, however communication and cooperation is not as commonplace. This illustration is meant only to be a guide to understanding the complex interrelations between various stakeholders, and the degree of involvement and communication between various players may change over time, or fluctuate dependent upon particular circumstances.

Figure 7: Marketing & Management of the Surf Coast (Tourism Structure)

<table>
<thead>
<tr>
<th>Public</th>
<th>Private</th>
<th>Public/Private</th>
<th>Direct Relationship</th>
<th>Indirect Relationship</th>
</tr>
</thead>
</table>

Facilitators: Inbound and Local Tour Operators
Numerous inbound and local tour operators operate in the Surf Coast region including: Australia One, Viator, Wildlife Tours Australia, Go West Tour, Coast to Country Touring, Tiger Moth World Adventure Park, Centre One Tours Australia, Seaside Coach Tours, etc.

Accommodation sector
The Surf Coast region provides a range of accommodation options for tourists including Houses/Cottages, Apartments, Bed & Breakfast/Farm Stays, Retreats, Motels, Hotels, Backpacker Lodges, and Resorts. According to TotalTravel.com (2009) there are 284 accommodation providers in the region with the most popular forms being Houses/Cottages (112), Apartments (47), and Bed & Breakfast/Farm Stays (43).
Auxiliary/Support Tourism Services
There are a number of service providers that support tourism within the Surf Coast region. These range from the supply of food and beverage services, to ATM and banking services. Most services are readily available throughout the region, particularly in tourist towns, however only basic services may be available in the more remote rural areas.

References