31 May 2007

Damian Drum MLC
Rural & Regional Committee
Parliament House
MELBOURNE VIC 3002

Dear Damian

RE: Parliamentary inquiry into Rural & Regional Tourism

Thank you for the opportunity to make a submission to this inquiry into regional and rural tourism.

Included overleaf is a summary of issues under the terms of reference of this inquiry which are considered of importance to ensuring the sustainability and growth of tourism in regional areas.

The Surf Coast Shire is among the fastest growing regional municipalities in Victoria (av. 3.06% annually for past 15 years).

With its spectacular coastline, array of beaches, National Parks and scenic rainforests, Surf Coast is a major tourist drawcard by national standards. It marks the start of the iconic Great Ocean Road which extends 50 kilometres along the Shire's coastline. It is a top of mind destination for Victorian visitors and one of Australia’s most well known coastlines.

The main population centres include Torquay, well known for its surf related industries and Bells Beach, Winchelsea, gateway to the fertile Western District, Anglesea and the beautiful resort town of Lorne. It covers an area of 1,560 km2.

The Surf Coast Shire has worked to enhance this environment while encouraging appropriate new development to the area. It is hoped that the matters raised following will provide insight into challenges for tourism in this region and highlight areas for future focus.

If you have any enquiries concerning this matter please contact Simon Loone, Tourism Coordinator on 03 5261 0608.

Yours Faithfully

[Signature]

Simon Loone
Tourism Coordinator
Surf Coast Shire

[enc]
(1) the economic benefits of tourism in regional areas, including tracking the flow-on benefits through other regional businesses and industry;

An executive summary of the economic benefits of tourism in the Surf Coast Shire is included below. It should be noted that although this information is available it is often difficult to get good reliable data at a Local Government Area (LGA) level as the ABS, NVS and IVS data refer to this region as ‘Western’ an area covering Geelong to the South Australian border.

Whilst some information can be extrapolated, compiled and presented as an indication, it is difficult to source truly reliable data to an LGA level.

This document presents a profile of tourism in Surf Coast Shire and estimates the impact of tourism on the local economy for the year ended September 2006. The study was conducted by Street Ryan & Associates in partnership with Geelong Otway Tourism.

EXECUTIVE SUMMARY

The Surf Coast Region

Surf Coast Shire comprises part of the Geelong Otway Tourism region and the Great Ocean Road campaign region of Victoria. At June 2005 it had an estimated resident population of 23,085, having grown at 2.7% pa from 2000 to 2005, more than double the State average of 1.1%. It houses 8.6% of Geelong Otway’s population. By 2031, it is expected Surf Coast’s population will be around 34,300 and its share of the region’s population around 10%.

Surf Coast Shire’s major industry sectors are recreation and leisure goods manufacturing (particularly associated with the surf industry), tourism and agribusiness. Because of its strong population growth and strong visitor numbers, it also has a well developed retailing and construction sector and an emerging home and micro business sector focusing on business services and information technology. Most residents are employed in retail, manufacturing and health and community services, and most businesses are in construction, property and business services, and finance and insurance services.

With its spectacular coastline, array of beautiful beaches, National Parks and scenic rainforests, Surf Coast is a major tourist drawcard by national standards. It marks the start of the iconic Great Ocean Road which then extends 50 kilometres along the Shire’s coastline. It is one of Australia’s most well known coastlines, complemented by scenic rural and forested environments.

The Shire offers a full complement of accommodation options ranging from camping and caravan/tourist parks to resorts, cottages, B&Bs and retreats.

VISITOR NUMBERS AND CHARACTERISTICS

In the year ended September 2006, Surf Coast attracted
- 802,000 day trips
- 550,000 domestic overnight visitors staying 1.7 million nights
- 28,400 international visitors staying an estimated 91,000 nights.

Its share of regional and State visitors was
- 24.5% of Geelong Otway and 2.5% of Victoria’s day visitors
- 29.9% of Geelong Otway’s and 3.2% of Victoria’s domestic overnight visitors
- 30.1% of Geelong Otway’s and 2.0% of Victoria’s international overnight visitors.
Most day visitors to Surf Coast
- are aged between 25 and 44 (45.6%)
- travel for holiday or leisure (76.1%)
- travel by private or company vehicle (100%)
- travel in the March quarter (40.9%)
- participate mostly in social and nature or outdoor activities
- spend an average of $73 in the Shire per day.

Most domestic overnight visitors to the Shire
- are aged between 25 and 44 (34.9%) and are younger than those throughout the region, Victoria and Australia
- have an average annual household income of between $78,000 and $103,499 (22.4%), with a lesser concentration in the lower income brackets than the region, Victoria and Australia
- travel for holiday or leisure (74.5%, a significantly higher proportion than throughout the region and the State)
- travel mainly in the March quarter (45.5%)
- travel by car (94.5%)
- travel as a family group (parents with children), but with relatively more travelling as friend or relatives without children and as "other" travel parties than the region and the State
- stay an average of 3.1 nights in the region
- stay in friends or relatives' properties (48%)
- participate in social, outdoor or nature, and sport or active outdoor activities
- spend an average of $112 per night per person.

Most international visitors to Surf Coast
- are aged 25 to 44 years (42.5%) and have a younger age profile than international visitors to Victoria or Australia
- originate from the United Kingdom (32.5%), whereas most international visitors to Victoria and Australia originate in Asia
- travel for holiday or leisure (83.2%) a significantly higher proportion than for Victoria (50%) or Australia (53%)
- stay in hotels, motels or resorts (36.5%)
- spend an average of $67 per night per person in the Shire.

The top 3 activities that international visitors participated in whilst in Surf Coast are
- eating out, dining at cafes, restaurants etc (98.5%)
- going to the beach (90.3%)
- going shopping for pleasure (86.7%).

OUTLOOK

TRA projections (October 2006) estimate that, from 2005 to 2015
- international visitors to Australia will increase at an average annual rate of 4.3%
- domestic overnight visitor nights will increase at an average annual rate of 0.5%.

Street Ryan estimates of day trips in Victoria suggest a drop of around 1.8% pa on average.

Should Surf Coast maintain the same proportion of Victorian day trips, and national domestic and international overnight visitors that it sustained throughout the period 1999 to 2006, then indicative visitation levels to the region in 2015 are
- 52,000 international overnight visitors (an increase of around 85% on September 2006 levels), possibly generating around 166,400 international visitor nights
- 1.6 domestic visitor nights, (a decrease of around 8%)
- 743,000 million day visitors (a decrease of around 7%).
ESTIMATED TOURISM IMPACTS

Total expenditure made by tourists in Surf Coast in the year ended September 2006 is estimated at $258 million.

This equates to around $11,200 tourist expenditure per resident, compared with $3,300 throughout Geelong Otway, $2,600 throughout Victoria and $3,100 throughout Australia, indicating a greater significance of tourism to the Shire.

The level of tourist expenditure is the equivalent of the average household expenditure of around 5,506 Victorian households or 74% of the occupied private dwellings in the Shire in 2001.

Direct tourist expenditure in Surf Coast is estimated to directly support 800 (full time and part time) jobs. Total employment supported by tourist expenditure (including flow-on or multiplier effects) is estimated at 1,040.

This represents 11.8% of employed residents in the Shire at the time of the 2001 Census of Population and Housing.
(2) Potential impediments to the sustained growth of regional tourism, economic activity and jobs;

PLANNING – TRANSLATION OF RURAL ZONE TO FARM ZONE

The Former Rural zone and Environmental zone allowed for range of uses including tourism uses to be applied for with a planning permit.

New rural zones developed by the State Government changed this context. The Rural zone became the Farming zone while the Environmental Rural zone became the Rural Conservation zone. Both these new zones only allow limited tourism based uses and limit tourist cabins to six on a site and must be in conjunction with agriculture, winery or rural industry.

The minister for Planning undertook a direct translation for Surf Coast Shire to the new rural zones with the Shire's agreement which resulted in all of the rural areas of the Shire being one of the above zones. Council also committed to undertake a Rural Strategy Review to revise the existing rural strategy but to also explore opportunities for application of the new Rural Activity zone which would effectively allow for consideration of uses similar to the old Rural zone.

The current draft Rural Strategy Review on exhibition has highlighted that the best opportunities for applying the Rural Activity zone (which would be targeted for tourism uses) would be in two areas: south of Deans Marsh and in the Gundrys Rd area. The main focus on nominating these areas has been based around providing opportunity for small scale tourism proposals that can blend with the landscape that currently are restricted by the Farming zone.

Even in the event the areas nominated are agreed with it will still be another year of two before they are likely to be implemented into the Planning Scheme.

The above is a good example of how the new rural zones have impacted on tourism potential with a number of proposals (tourism parks, breweries) not able to seek planning permits under the current zones. It also highlights the resources, time and effort involved in strategically justifying the only zone that will allow flexible tourism opportunities (Rural Activity zone).

RURAL ZONES AND THE IMPACT ON ACCOMMODATION SUPPLY

The impact of restricting the size of the development of group accommodation and having it run as a subsidiary operation to an agricultural base is that the quality of the accommodation is likely to suffer as a secondary operation. B&B operators display a wide variety of performances, overall indicating that the development of the market has been dictated by lifestyle decisions rather than business investment decisions.

An accommodation supply and demand study is currently being undertaken by Geelong Otway Tourism. The original study conducted in October 2002 by Macropian noted a the numbers of Bed & Breakfasts had increased from a ‘sprinkling’ to 130 throughout the Geelong Otway Region. The study indicated limited growth in the market due to the very low occupancy levels recorded by B&B operators, particularly in Geelong.

Given these very low occupancy levels (e.g. in some cases as low as 15% for the year), it was assumed then that there was an oversupply in the market and future development should be restricted in certain sub-regions until excess demand can be proven by future surveys of the sector. There are now more than 155 of
this type of accommodation in the Surf Coast region alone and is not considered sustainable in terms of quality or enough demand.

RURAL CONSERVATION ZONES

Separate to the above the Shire has also flagged with DSE that the Rural Conservation zone should be redrafted to allow tourism uses to be in conjunction with environmental management as opposed to currently relating to agriculture given the difficulties in such a link being made on such sites.

Following the introduction of Clause 35.06 – Rural Conservation Zone into the Surf Coast Planning Scheme in January 2006, Surf Coast Shire has been experiencing a conflict between the section 2 condition and State policy, local policy and the purpose of the zone when assessing planning permit applications to use and develop land for group accommodation.

Under the provisions of Clause 35.06-1, a planning permit is required for group accommodation and a permit may only be granted if the condition must be used in conjunction with Agriculture, Rural Industry or a Winery" is met. As a result, any form of group accommodation not used in conjunction with these specified activities is prohibited.

Surf Coast shire contains substantial areas of private land which are heavily vegetated supporting a variety of significant flora and fauna. Due to the sensitive nature of these blocks, managing the land predominantly for environmental purposes is often more appropriate than farming uses. The draft Surf Coast Shire Rural Strategy Review demarks the areas containing Rural Conservation Zones as having ‘poor’ agricultural quality.

The Rural Conservation Zone is considered to be the most appropriate zoning within the VPPs for these properties in conjunction with a range of overlays to protect the environmental assets recognised in State and local policy. Yet there is a shortfall within the zone in respect to group accommodation which Surf Coast deems could be considered where it meets the environmental objectives outlined in the purpose of the zone.

It is suggested that consideration be given to amend Clause 35.06-1 to allow group accommodation where such a use can justify achieving the environmental objectives within the purpose of the zone rather than in conjunction with specific rural activities only. This would allow greater flexibility in the provision of appropriately scaled tourist facilities whilst ensuring the environmental objectives and the values of the zone are achieved.

HOUSING AFFORDABILITY ISSUES IN SURF COAST

Affordable housing presents a potential major impediment to attracting and retaining skilled, unskilled, seasonal workers and full time workers. Demand for workers is highest during the peak summer period when the accommodation options are also at their highest occupancy and most expensive making the job prospects in many cases unviable.

- Housing costs, both for purchase and rent, have increased rapidly over the last 5-10 years. Residents are concerned that dwellings are becoming unaffordable for young couples and that low cost and rental properties are not available for service sector workers.

- The number of active lettings is low both in numbers and as a proportion of the total number of dwellings Surf Coast is the least affordable regional municipality in Victoria when comparing housing
rental costs, and trends indicate this will continue. Figures collected between September 1999 and March 2006 indicate that the proportion of affordable private rental housing in Surf Coast has steadily declined over this period from approximately 55% to 20% of all rentals.

- The median weekly rental for a property in Surf Coast in 2005 was $234 per week. This compares with median rentals in Greater Geelong of $185, Colac Otway of $176, Queenscliff of $200 and Golden Plains of $185. Within western metropolitan Melbourne the 2005 median rental in Wyndham was $200, Maribyrnong was $203, Brimbank $186 and Moreland $216. On available data, the Surf Coast rental median was exceeded only by inner and eastern suburban municipalities.

- Valuation data indicates that the median residential valuations have increased substantially over the last 5 years. In 2000 the median property valuation was $159,000. In 2004 the median was $369,000. This represents a 132% increase over the 4 year period. These increases in dwelling prices can be largely attributed to the rise in land values rather than construction costs, as the average increase in property prices of 132% over 4 years is well above the inflation rate which has varied between 2.0% and 4% over the 4 years ending June 2006 (Consumer Price Index, Reserve Bank of Australia, www.rba.gov.au). The increase in property prices has not been restricted to the Surf Coast Shire, although the rate of increase has been very high in comparison to other areas. Property prices in Geelong and Melbourne have also seen increases, although these have been far more modest, with the median house price in Melbourne rising by 20% to $375,000 between September 2001 and September 2006.

- There is an imbalance between the coastal and hinterland townships, with coastal townships having greatest exaggerations of unaffordability and lack of low cost housing

- As a result, there is a lack of low cost housing, for both short and long term occupancy in coastal townships.

- Provision of low cost housing for employees is necessary for the economic health of the Shire

- Locating low cost housing options in hinterland towns, distant from sustainable transport to employment nodes, is not a sound long term strategy. Anecdotal evidence from the stakeholder consultation suggests that a large proportion of employees in Lorne and other coastal towns are travelling from Geelong, Winchelsea or Colac over peak periods, due to the lack of low cost housing in the vicinity. GORRS envisages that the service sector employment base for the region will be located in inland towns such as Winchelsea. There may also be opportunities to provide for employee accommodation within caravan parks in the area, as well as increasing the supply of dwellings in nearby Deans Marsh, where property prices are significantly lower. However, the lack of public transport between Winchelsea, Deans Marsh and the Lorne area presents an obstacle in terms of providing sustainable travel choices and catering for affordability, as residents would be car dependent. The long term sustainability of catering for employee accommodation in hinterland towns is also questioned in the Amendment C18 Panel report for the Aireys Inlet to Eastern View Neighbourhood Character Study. As petrol prices increase employees will be unwilling or unable to travel long distances to lower paying jobs. Without employees 39 the tourism sector will suffer. There are economic imperatives, therefore, in addressing the housing affordability issue. This anecdotal evidence is reinforced by Regional Matters (DSE) and the findings contained in the G21 Plan, which identifies issues of affordability, and the resulting impact on locals who are forced out of coastal towns due to increased land values and rates, and the fact that workers cannot afford to live in coastal towns.

**Strategies identified to address some of the above issues include:**

2.2.1 Encourage long term rental of existing holiday homes to increase the supply of private rental accommodation to address demand and current high rental costs.

2.2.2 Actively encourage new caravan and camping facilities to provide for key or seasonal worker accommodation and discourage the subdivision of existing caravan parks for private housing.
2.2.3 Explore opportunities for the development and/or use of educational, conference, school camp or other facilities in or near Lorne, Anglesea and Torquay that also provide affordable or low cost housing for seasonal workers during the peak holiday periods.

2.2.4 Encourage the development of backpacker facilities, particularly in Lorne, which incorporate a separate component for the accommodation of key workers during peak periods.

2.2.5 Encourage the provision of employee accommodation by government organisations to support the delivery of essential services (e.g. Police, education, ambulance, fire services etc).

2.2.6 Encourage opportunities for the expansion of social housing (community and public housing) in the Surf Coast Shire.

2.2.7 Promote economic development and new employment opportunities (particularly higher end/professional) across the Shire to complement the tourism industry, provide increased employment choice, and improve the accessibility of home ownership in the Shire by increasing its affordability relative to income.

3.1.1 Encourage the development of medium and higher density housing close to shops, transport, services and facilities.

3.1.2 Ensure that medium and higher density housing provides a range of dwelling sizes, particularly smaller dwellings.

2.2.8 Encourage a diversity of lot and housing sizes in new subdivisions to cater for different prices and household sizes, including medium and higher density housing in appropriate and accessible locations.

**CARAVAN PARKS AND AFFORDABLE HOUSING FOR KEY WORKERS**

The Surf Coast Shire Economic Development Strategy acknowledges that Caravan Parks provide a major component of visitor accommodation in the Shire. Privately owned Coastal Caravan Parks are facing uncertain futures due to rates of rental on coastal land on which they are situated. A priority activity must be to negotiate arrangements regarding sustainable use and development of coastal caravan parks as a key component in affordable visitor accommodation.

Within the Surf Coast Shire, caravan parks have not historically provided longer term accommodation, as is seen in some suburban parts of Melbourne, where long term leases and semipermanent dwellings often provide low cost housing. Indeed, some caravan parks within the Shire have limits on the number of weeks per year that a caravan or cabin may be occupied, which serves to prevent permanent occupation. At the same time, high development pressure in coastal areas is resulting in the loss of caravan parks, which often occupy valuable and high amenity land. Opportunities for new caravan parks and protection of existing camping and caravan facilities is also important in terms of providing tourist accommodation, which at the same time may assist in reducing the market for accommodation in dwellings that could otherwise be permanently occupied.

Caravan parks have also been identified as offering transitory accommodation for seasonal employees of tourism areas during peak holiday periods, where the influx of visitors to the area combined with the high costs of housing make it difficult for employees to find local accommodation. The Lorne Strategy Plan Review notes the lack of suitable accommodation for key workers, and notes the need for a review of camping and caravan facilities in the town. Caravan parks within Lorne and Anglesea were contacted to gauge their current use for temporary or longer term accommodation for key workers and others (e.g. retirees), as these townships have the greatest demand for key worker accommodation and are more remote from areas of more affordable housing. Three caravan park operators provided input: the Great Ocean Road Coast Committee (operating the 5 caravan parks in Lorne), the Big 4 Anglesea Holiday Park (Driftwood) and the Anglesea Beachfront Family Caravan Park.
Each operation varied, with only one of the Anglesea caravan parks currently providing potential for affordable accommodation for local employees (in addition to providing units for permanent retiree accommodation), with all operators having varying limits on the length of stay over a year or the peak holiday period. This poses a major barrier to the use of this type of accommodation over longer term periods. In addition, the high cost of much of the caravan park accommodation and the need to book the accommodation well in advance, effectively rules out the use of caravan parks for most employees of the tourism and service industries who often seek employment over the peak holiday periods.

Maintaining caravan parks as a low cost housing option is becoming increasingly difficult due to land price increases in coastal areas. Private caravan and camping sites are frequently lost to subdivision, and one of the private caravan park operators spoke of the imminent closure of a further two privately operated caravan parks within the Surf Coast Shire. The Council owned sites are therefore increasingly important for the maintenance of these facilities.

**GRANT FUNDING**

The Surf Coast Shire has benefited from grant funding at a State and Federal level enabling the construction of tourism infrastructure such as the Lorne Visitor Centre and Anglesea Riverbank Masterplan. Continuing support via funds such as these is essential to provide infrastructure and services to support the visitor demand.

**Public Transport & Road Access**

The Tourism Strategic Plan for the Surf Coast region notes a weakness to the region as public transport both to and within the region. Improved public transport could decrease traffic and parking congestion and provide a better service to residents.

The Geelong Ring Road presents great potential for access to the Surf Coast region but also a threat to Torquay if a connection to the Surf Coast Highway does not go through.

The presentation of the rail corridor from Melbourne to Geelong relation to graffiti and rubbish has a negative impact on visitor perceptions to the region of travel to Geelong, Geelong itself and access to the Great Ocean Road.
(3) the effectiveness, at a National, State and local level, of current programs to promote and enhance tourism in regional Victoria;

The Great Ocean Road Coast Committee (GORCC) is intending to install paid parking meters at the car parks of the most popular surf beaches in Torquay and the Surf Coast. Parking along the coast has been free with the exception of Lorne (however there is ample free parking available in close proximity to the beach).

The Surf Coast Tourism Board believe that paid parking to be installed in these locations will have a negative impact on tourism and the Surf Coast community.

GORCC decided to install the parking meters as the funding received from their major revenue source, the coastal caravan parks and from State Government was not enough to allow them to provide the maintenance on infrastructure and services which are in high demand during the peak periods.

There is a great deal of community opposition to the installation of the parking meters and it is felt that if the funding at a State level was directed towards areas that carried a higher ‘tourism’ demand then the experience of both the visitor and community need not be detrimentally impacted.

Public infrastructure that often receives the highest level of demand and is the first introduction to a region is the public toilets. The construction and maintenance of these facilities rests with both Council and the Coast Committees of Management. Grant funding should be available to support the development of facilities in ‘tourism demand’ areas.
(4) initiatives to increase both international and domestic visitor nights in regional Victoria;

Strategies identified in the Tourism Strategic plan for the Surf Coast region to increase both domestic and international visitor nights in regional Victoria include:

- Develop a Shire-wide approach to the development of tourism marketing collateral to ensure that marketing efforts are collaborative, not duplicating effort.
- Promote and develop conferencing as a high yield niche product in Surf Coast.
- Direct market to holiday home owners, to stimulate increased visits, for example through direct promotion of upcoming events and product offers.
- Develop mountain biking as a key outdoor activity within the Shire, particularly in Anglesea, the development of a network of purpose built mountain bike trails which can be directly accessed from town. The development of world class mountain bike trails will attract local, state, national and ultimately international events which will further enhance Anglesea’s reputation as a world class mountain bike destination.
- Develop multi day walks through coastal parks linking Surf Coast Shire townships.
- Develop year-round events for Surf Coast Shire based on product strengths, with a preference for new events in the off-peak season.
- Support the development of food and wine product in the hinterland and inland villages.
- Lobby V/Line to operate more frequent bus services from Melbourne during peak periods.
- Explore the potential to develop safe boating infrastructure in the Shire, including moorings and boat launching facilities.
- Investigate the relocation of the Torquay Visitor Centre and Surfworld to a prominent location.
- Support infrastructure improvements that promote touring in the Shire, including stopping points, lookouts, interpretive information.
- Establish an on-going training program of business development and professional development for the tourism industry including business accreditation.

Focus on Visitor Spend and Length of Stay, not numbers

The Surf Coast Shire Economic Development strategy acknowledges nature based tourism represents the primary product strength of the Surf Coast Shire.

A range of tourism strategies focus on **increasing length of stay and yield** from visitors to the Great Ocean Road Region and extending off peak tourism, **rather than simply focusing on increasing visitor numbers** to the region.
The strategies and plans also highlight the need to better manage visitor movement, which is underpinned by strategic product development, strategic planning, transport planning, improving north-south connecting routes between the Great Ocean Road, the hinterland and the Princes Highway, and infrastructure development. A connection to the Surf Coast Highway from the Geelong Bypass is seen as a significant project to ensure that visitors don't bypass Torquay and the tourism and surf industry offer available.

A critical issue to increasing length of stay and yield is to provide a diversity of quality accommodation options and to provide quality tourism product that is consistent with the coastal and natural assets of the region and takes into account both current supply and future demand.

Due to the nature of the region's tourism strengths, product and infrastructure development is complex as many attractions and activities are within the proposed single National Park being developed along the coast. This necessitates the maintenance of highly functional partnerships between the tourist bodies, tourist operators and the public land managers (Department of Sustainability and Environment and Parks Victoria).

INTERNET

Technology will play a large role in the future sustainability and growth of the Victorian tourism industry. There is a distinct lack of cohesion on a state level when it comes to providing the consumer a single platform to convert interest into bookings.

The official Tourism Victoria web sites visitvictoria.com and visitmelbourne.com offer no capacity to book product. This is certainly a concern, as almost all branding and state endorsed tactical campaigns use the web site as the call to action.

Tourism Victoria are expected to announce developments on a web based booking platform in June. It is highly anticipated by the tourism industry at an RTA and LTA level.

HERITAGE LISTING OF THE GREAT OCEAN ROAD

The Great Ocean Road is this region's single greatest natural asset and tourism attraction. The Great Ocean Road is the 'top of mind' destination for both domestic and international visitors when thinking of a Victorian holiday. This year the Great Ocean Road celebrated its 75th Anniversary and was given due recognition by the RSL as the world's largest living war memorial as it was built by the returned soldiers and sailors of World War 1 in honor of their fallen comrades. It also incorporates the Great Otway National Park, Port Campbell National Park and 12 Apostles, 2 Marine National parks and the worlds first surfing reserve at Bells
Beach. The Great Ocean Road needs to be gain heritage listing to ensure that its flora, fauna, views and history will be preserved for future generations.

**SURF COAST SHIRE MSS**

The Surf Coast Shire Municipal Strategic Statement (MSS) refers to "the Surf Coast facilitating authentic experiences for visitors with a focus on eco and cultural tourism activities", adopting the following objectives:

- Protecting the natural environment through development controls
- Heritage listing of the GOR (see above)
- Promoting a total experience
- Encouraging provision of tourist accommodation
- Encouraging private sector development of tourist facilities
- Encouraging tour packages and off-peak tourism opportunities
- Promoting eco-tourism and cultural activities
- Developing a festivals program
- Support the sport and recreation business sector

The MSS refers to opportunities afforded in the "well-being industry" and identifies the "natural environment and scenic beauties of the GOR and coastal environs" as the single most important asset to the Shire. While recognizing the critical importance of these features it also recognizes the inherent threats to these assets through development pressure, limited land availability, lifestyle preferences and building design and sighting issues.

**REGIONAL CAMPAIGN COMMITTEES**

Regional campaign committees (RCC) within the tourism industry structure are relied on by both Tourism Victoria as well as the Regional and Local Tourism Associations to provide the broader marketing efforts both interstate and international.

Due to variance in industry structures across the state, this marketing effort can either be effective or disconnected from the region depending on the level of communication and understanding between industry associations and operators. If an RCC campaign is misunderstood or not created with industry input, it is likely that further marketing efforts will be undertaken at an RTA or LTA level which may diminish the effectiveness of both campaigns.

The Great Ocean Road region is now fortunate that Great Ocean Road Marketing in association with Tourism Victoria has created an overall brand strategy for the Great Ocean Road that also allows for specific destinations to be marketed to their specific target markets but still retain that regional 'Great Ocean Road' branding.
As a result of the new brand campaign, more resources than ever before are available to promote specific destinations under the broader campaign region and the results are highly anticipated.
(5) the efficacy of existing mechanisms at a National, State and local level to address the impact on regional tourism of natural events such as bushfires, floods and drought, and effective measures to drive long term economic recovery; and
(6) opportunities to leverage private investment and commercial activity in regional tourism infrastructure, including ecotourism.

Many of the opportunities to leverage private investment and commercial activity in regional tourism infrastructure including ecotourism are limited in regional tourism as mentioned in reference in section 2 under the translation of the Rural Zones to Farm Zones.

Better communication between the tourism industry and the land managers (eg Parks Victoria) is required to allow for joint planning and management plans that achieve both conservation of the natural assets and tourism development.