

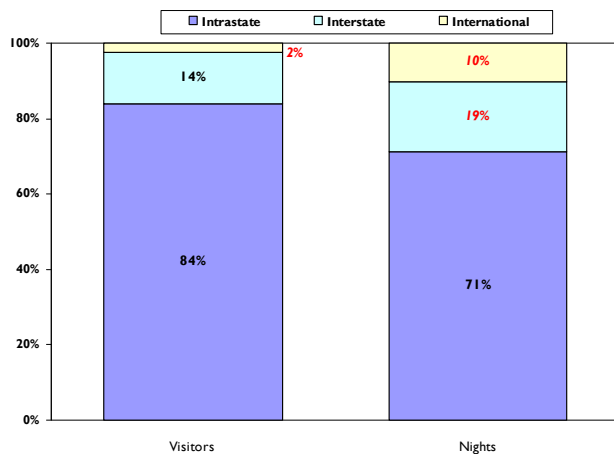
Daylesford and the Macedon Ranges Market Profile Year Ending December 2010



This fact sheet provides a summary of the latest tourism data for the Daylesford and the Macedon Ranges campaign region. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO DAYLESFORD AND THE MACEDON RANGES

Eighty-four percent of overnight visitors to Daylesford and the Macedon Ranges were sourced from the intrastate market, followed by 14% from interstate.



Seventy-one percent of visitor nights in the Daylesford and the Macedon Ranges region were sourced from the intrastate market.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
Domestic					
Overnight Visitors (000s)	449	317	390	-1.4% p.a.	+23.0%
Visitor Nights (000s)	1,032	780	913	-1.2% p.a.	+17.1%
Daytrip Visitors (000s)	1,446	1,391	1,405	-0.3% p.a.	+1.0%
International					
Overnight Visitors (000s)	6.5	11.8	9.8	+4.2% p.a.	-17.4%

* Average Annual Growth

Domestic Overnight Visitation

The Daylesford and the Macedon Ranges region received an estimated 390,000 domestic overnight visitors for the year ending December 2010. This was an increase of 23.0% from 2009 to 2010. Four percent of all domestic overnight visitors to regional Victoria visited the Daylesford and the Macedon Ranges region.

The average annual decline since 2000 was 1.4% for domestic overnight visitation to the region compared to a decrease of 2.0% for regional Victoria generally.

Domestic Visitor Nights

For the year ending December 2010 the region received an estimated 913,000 domestic visitor nights, an increase of 17.1% from 2009 to 2010. The region had a 3% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 2.3 nights in 2010, down from 2.5 nights in 2009.

The average annual decline since 2000 was 1.2% for domestic visitor nights to the region in line with that for regional Victoria.

Domestic Daytrip Visitation

There were an estimated 1.4 million domestic daytrip visitors to the Daylesford and the Macedon Ranges region in the year ending December 2010. This was an increase of 1.0% from 2009 to 2010. Six percent of all domestic daytrips to/within regional Victoria visited the Daylesford and the Macedon Ranges region.

International Overnight Visitation

The Daylesford and the Macedon Ranges region received an estimated 9,800 international overnight visitors for the year ending December 2010. This was a decline of 17.4% from 2009 to 2010. Three percent of all international overnight visitors to regional Victoria visited the Daylesford and the Macedon Ranges region.

The average annual growth since 2000 was 4.2% for international overnight visitors to the region compared to 2.1% for regional Victoria generally.

Estimated International Daytrip visitors

It is estimated that Daylesford and the Macedon Ranges received 15,100 international daytrip visitors in the year ending December 2010.

Economic Importance of Tourism in the region (2007/08).

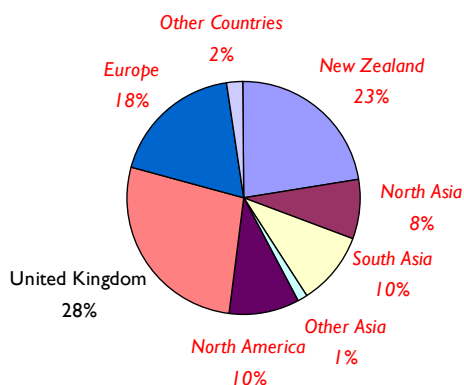
By estimating the ratio of the region's total tourism output to its total economic output, it is estimated tourism represents 3.0% of the economy in the Daylesford and the Macedon Ranges region.

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PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO DAYLESFORD AND THE MACEDON RANGES

Origin (% of international overnight visitors to Daylesford and the Macedon Ranges)*



The largest source market of international overnight visitors to Daylesford and the Macedon Ranges for the year ending December 2010 was the United Kingdom, accounting for 28% of international overnight visitors to the region.

Age Group (% of international overnight visitors to Daylesford and the Macedon Ranges)*

International overnight visitors to Daylesford and the Macedon Ranges were most likely to be aged between 45-64 years (36%) or 25-44 years (28%).

Age Group	DMR	Regional Vic
15 - 24 years	18%	16%
25 - 44 years	28%	36%
45 - 64 years	36%	36%
65+ years	18%	11%

Purpose of Visit (% of international overnight visitors to Daylesford and the Macedon Ranges)*

Forty-four percent of international overnight visitors to Daylesford and the Macedon Ranges were visiting friends and relatives and 43% were holiday visitors.

Purpose of Visit	DMR	Regional Vic
Holiday or leisure	43%	53%
Visiting friends and relatives	44%	30%
Other	13%	17%

Length of Visit (% of international overnight visitors to Daylesford and the Macedon Ranges)*

Fifty-four percent of international overnight visitors to Daylesford and the Macedon Ranges were on a short visit of 1-3 nights.

Length of Visit	DMR	Regional Vic
1-3 nights	54%	54%
4-7 nights	22%	20%
8-14 nights	9%	10%
15+ nights	15%	16%

Travel Party (% of international overnight visitors to Daylesford and the Macedon Ranges)*

Forty-six percent of international overnight visitors to Daylesford and the Macedon Ranges were travelling on their own and another 32% travelled as part of an adult couple.

Travel Party	DMR	Regional Vic
Travelling alone	46%	49%
Adult couple	32%	32%
Family (parents and children)	9%	7%
Other	12%	12%

Top 10 Activities (% of international overnight visitors to Daylesford and the Macedon Ranges)^

Compared to all international overnight visitors to regional Victoria, overnight visitors to Daylesford and the Macedon Ranges were less likely to eat out (52% compared to 58%) on their trip.

Activity	DMR	Regional Vic
Eat out	52%	58%
Sightseeing/looking around	45%	54%
Shopping for pleasure	26%	27%
Pubs / clubs / discos etc	20%	21%
Visit museums or art galleries	19%	7%
Bushwalking / rainforest walks	19%	17%
Visit historic buildings / sites	18%	9%
Visit national parks / state parks	16%	26%
Visit botanical or other public gardens	16%	7%
Visit farms	16%	8%

* Based on 2 years of data: January 2009 – December 2010.

^ Based on 3 years of data: January 2008 – December 2010.

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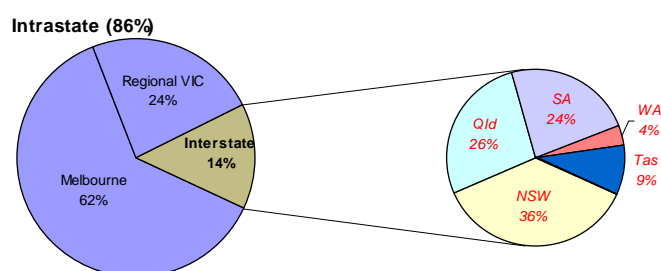
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PROFILE OF DOMESTIC OVERNIGHT VISITORS TO DAYLESFORD AND THE MACEDON RANGES

Destination preference

Three percent of Australians and 10% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to the Daylesford and the Macedon Ranges region in the next two years.

Origin of domestic overnight visitors to Daylesford and the Macedon Ranges



Intrastate overnight visitors account for 86% of total domestic overnight visitors to the region. Interstate overnight visitors, accounting for 14% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 36% of all interstate overnight visitors to the region.

Age Group (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

Domestic overnight visitors to Daylesford and the Macedon Ranges were most likely to be aged between 45-64 years (33%) and 25-44 years (31%).

Age Group	DMR	Regional Vic
15 - 24 years	14%	14%
25 - 44 years	31%	35%
45 - 64 years	33%	35%
65+ years	22%	16%

Purpose of Visit (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

Fifty-two percent of domestic overnight visitors to Daylesford and the Macedon Ranges were visiting friends and relatives and 35% were holiday visitors.

Purpose of Visit	DMR	Regional Vic
Holiday or leisure	52%	55%
Visiting friends and relatives	35%	33%
Business	7%	9%
Other	7%	4%

Lifecycle (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

Domestic overnight visitors to the Daylesford and the Macedon Ranges region tended to be in the parent (31%) and older non-working (28%) lifecycle groups. Compared to all domestic overnight visitors to regional Victoria, visitors to the region were more likely to be older non-working (28% compared to 20%) or single, no kids (19% compared to 17%).

Lifecycle	DMR	Regional Vic
Single, No Kids	19%	17%
Couple, No Kids	7%	11%
Parent	31%	37%
Older Working	14%	15%
Older Non-Working	28%	20%

Length of Visit (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

Eighty-eight percent of domestic overnight visitors to Daylesford and the Macedon Ranges were on a short trip of 1-3 nights.

Length of Visit	DMR	Regional Vic
1-3 nights	88%	76%
4-7 nights	10%	19%
8-14 nights	1%	4%
15+ nights	1%	1%

Travel party (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

The majority of visitors to the Daylesford and the Macedon Ranges region travelled as an adult couple (34%). When compared to visitors to regional Victoria, visitors to Daylesford and the Macedon Ranges were more likely to travel as an adult couple (34% compared to 29%) and less likely to travel as a family (18% compared to 27%).

Travel Party	DMR	Regional Vic
Travelling alone	16%	19%
Adult couple	34%	29%
Family group - parents and children	18%	27%
Friends or relatives	20%	21%
Business associates	6%	2%
Other	6%	2%

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Seasonality of Trip (% of domestic overnight visitors to Daylesford and the Macedon Ranges)¹

Domestic overnight visitation to the region peaks during Spring, attracting the highest proportion of visitors (32%). Visitation is relatively consistent throughout the remainder of the year, with visitation being the lowest in Winter (22%).

Month	DMR	Regional Vic
December	7%	8%
January	10%	15%
February	6%	7%
Summer	23%	30%
March	7%	10%
April	8%	11%
May	8%	6%
Autumn	23%	26%
June	7%	7%
July	9%	8%
August	5%	6%
Winter	22%	21%
September	9%	7%
October	11%	8%
November	12%	9%
Spring	32%	24%

Accommodation (% of domestic visitor nights in Daylesford and the Macedon Ranges)²

Of all domestic visitor nights in the Daylesford and the Macedon Ranges region for 2010, 39% were spent with friends or relatives.

Accommodation	DMR	Regional Vic
Friends or relatives property	39%	37%
Hotel, motel or serviced apartment	17%	16%
Rented house, apartment, flat or unit	15%	11%
Own property (e.g. holiday house)	9%	8%
Caravan park / camping (Commercial or private)	8%	22%
Guest house or B&B	7%	2%
Other	4%	5%

¹ Based on 2 years of data: January 2009 – December 2010.

² Based on 3 years of data: January 2008 – December 2010.

Top 10 Activities (% of domestic overnight visitors to Daylesford and the Macedon Ranges)

Compared to all domestic overnight visitors to regional Victoria, overnight visitors to the Daylesford and the Macedon Ranges region were more likely to eat out (54% compared to 50%), go on a bushwalk or rainforest walk (15% compared to 13%) and go to markets (14% compared to 7%).

Activity	DMR	Regional Vic
Eat out at restaurants	54%	50%
Visit friends and relatives	45%	45%
General sight seeing	33%	30%
Go shopping (pleasure)	24%	24%
Bushwalking or rainforest walks	15%	13%
Going to markets (street, weekend or art craft)	14%	7%
Pubs clubs discos etc	12%	18%
Visit national parks or State parks	12%	11%
Visit museums or art galleries	9%	5%
Visit a health spa or well-being centre	6%	1%

Roy Morgan Values Segments³ (% of domestic overnight leisure visitors to Daylesford and the Macedon Ranges)

Domestic overnight leisure visitors to Daylesford and the Macedon Ranges were more likely to come from the Socially Aware (31%) and Visible Achievement (25%) Values Segments.

Values Segments	DMR	Regional Vic
Basic Needs	1%	1%
Fairer Deal	0%	2%
Traditional Family Life	13%	20%
Conventional Family Life	8%	10%
'Look At Me'	8%	9%
Something Better	2%	5%
Real Conservatism	1%	4%
Young Optimism	10%	6%
Visible Achievement	25%	22%
Socially Aware	31%	22%

³ Developed in conjunction with Colin Benjamin of the Horizons Network

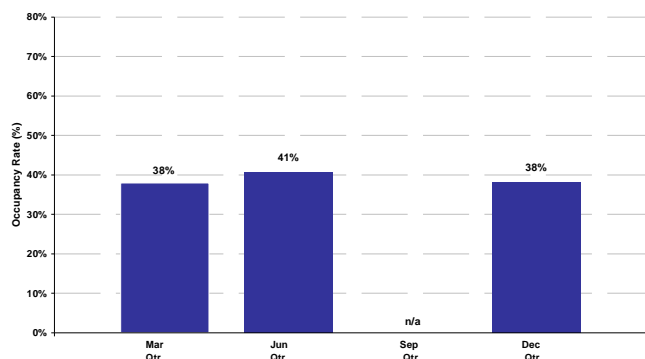
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Tourist Accommodation - supply and demand in Daylesford and the Macedon Ranges

- Based on the ABS Survey of Tourism Accommodation:
- There were 12 hotels/motels/serviced apartments with 15 or more rooms in the region as at the December quarter 2010.

	At December Quarter 2010		Year Ending December 2010		
	Establishments	Rooms/Sites Available	Room Nights Occupied ('000)	Average Occupancy Rate	Takings (\$million)
Hotels/Motels/Serviced Apartments 15+ rooms	12	487	n/a	n/a	n/a



Note: N/A refers to results in 2010 that were not reported by the ABS, primarily due to maintaining data confidentiality for the accommodation suppliers in the region.

In 2010, changes were made to the ABS Survey of Tourist Accommodation to only collect and publish the core scope of 15 or more rooms establishments in the survey.

It's important to be aware that the Daylesford and the Macedon Ranges region also offers a number of smaller accommodation properties with less than 15 rooms including Bed and Breakfast properties, cottages and farmstays. These accommodation establishments are not included in the scope of the ABS Survey of Tourist Accommodation results outlined above.

For more information on tourist accommodation in Victoria please refer to the Australian Bureau of Statistics website: <http://www.abs.gov.au/AUSSTATS/abs@.nsf/allprimarymainfeatures/7F1BCA4FD889E82CCA25775700164667?opendocument>

For more information and statistics on tourism in Victoria and Australia please refer to the:

1. Tourism Victoria website:

<http://www.tourism.vic.gov.au/facts-and-figures/>

2. Dept of Resources, Energy and Tourism website:

http://www.ret.gov.au/tourism/tourism_statistics/Pages/TourismStatistics.aspx

3. Tourism Research Australia website:

<http://www.ret.gov.au/tourism/tra/Pages/default.aspx>

4. Destination Visitor Survey results:

<http://www.ret.gov.au/tourism/tra/regional/destinations/Pages/default.aspx>

Note 1: Percentages may not add to 100% due to rounding.

Note 2: Figures in *red italics* are subject to sampling error and should be used with caution.

Sources:

- National and International Visitor Surveys*, year ending December 2000-2010, Tourism Research Australia, Canberra
- The Economic Importance of Tourism in Australia's Regions*, Tourism Research Australia, Canberra
- Holiday Tracking Survey*, year ending December 2010, Roy Morgan Research
- Survey of Tourist Accommodation*, December 2010, Australian Bureau of Statistics.