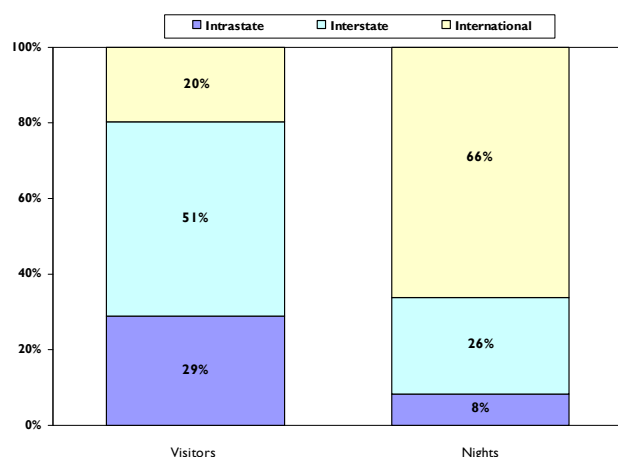


This fact sheet provides a summary of the latest tourism data for Melbourne. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO MELBOURNE

Fifty-one percent of overnight visitors to Melbourne were sourced from the interstate market, followed by 29% from intrastate and 20% from the international market.



Sixty-six percent of visitor nights in Melbourne were sourced from the international market, followed by 26% from interstate and 8% from the intrastate market.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
Domestic					
Overnight Visitors (000s)	6,233	6,257	6,260	+0.0% p.a.	+0.0%
Visitor Nights (000s)	18,789	18,102	18,167	-0.3% p.a.	+0.4%
Daytrip Visitors (000s)	13,688	13,880	14,313	+0.4% p.a.	+3.1%
International					
Overnight Visitors (000s)	1,078.2	1,437.2	1,544.4	+3.7% p.a.	+7.5%

* Average Annual Growth

Domestic Overnight Visitation

Melbourne received an estimated 6.3 million domestic overnight visitors for the year ending December 2010, the same as the previous year. Forty percent of all domestic overnight visitors to Victoria visited Melbourne.

Since 2000 average annual growth in domestic overnight visitation has remained stagnant, compared to a decrease of 1.3% for Victoria generally.

Domestic Visitor Nights

For the year ending December 2010 the region received an estimated 18.2 million domestic visitor nights, an increase of 0.4% from 2009 to 2010. The region has a 37% market share of all domestic visitor nights to Victoria.

The average length of stay was 2.9 nights in 2010, unchanged from 2009.

The average annual decline since 2000 was 0.3% for domestic visitor nights to the city compared to a decline of 0.9% for Victoria generally.

Domestic Daytrip Visitation

There were 14.3 million domestic daytrip visitors to Melbourne in the year ending December 2010, an increase of 3.1% from 2009 to 2010. Thirty-seven percent of all domestic daytrips to/within Victoria visited Melbourne.

Domestic Visitor Expenditure

Domestic overnight expenditure in Melbourne in 2010 is estimated to be \$4.66 billion, with visitors spending on average \$256 per night and \$744 per visitor.

Domestic daytrip visitors are estimated to have spent \$1.48 billion in the region in 2010, spending on average \$103 per visitor.

International Overnight Visitation

Melbourne received an estimated 1.5 million international overnight visitors for the year ending December 2010. This was an increase of 7.5% from 2009 to 2010. Ninety-four percent of all international overnight visitors to Victoria visited Melbourne.

The average annual growth since 2000 was 3.7% for international overnight visitors to the region, with a similar result for Victoria generally (3.7%).

International Visitor Expenditure

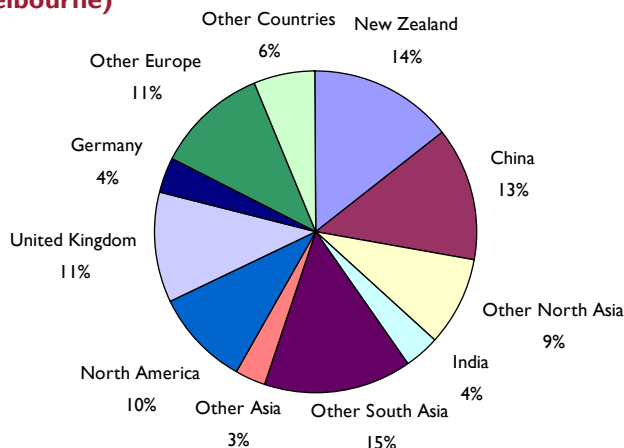
International overnight expenditure in Melbourne in 2010 is estimated to be \$3.65 billion, with visitors spending on average \$102 per night and \$2,353 per visitor.

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 2.3% of the economy in Melbourne.

PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO MELBOURNE

Origin (% of international overnight visitors to Melbourne)



The largest source markets of international overnight visitors to Melbourne for the year ending December 2010 were New Zealand (14%), China (13%), and the UK (11% of international overnight visitors to the region). The combined South Asia markets (excluding India) also make up a large proportion of the international market (15%), as does Europe (Germany 4% and the remainder 11%) and North America (10%).

Age Group (% of international overnight visitors to Melbourne)

International overnight visitors to Melbourne were most likely to be aged between 25-44 years (40%) or 45-64 years (34%).

Age Group	Melbourne	Victoria
15 - 24 years	18%	18%
25 - 44 years	40%	40%
45 - 64 years	34%	35%
65+ years	7%	8%

Purpose of Visit (% of international overnight visitors to Melbourne)

Forty-six percent of international overnight visitors to Melbourne were holiday or leisure visitors and 23% were visiting friends and relatives. A further 17% were visiting for business purposes.

Purpose of Visit	Melbourne	Victoria
Holiday or leisure	46%	46%
Visiting friends and relatives	23%	24%
Business	17%	17%
Other	14%	13%

Length of Visit (% of international overnight visitors to Melbourne)

Thirty-five percent of international overnight visitors to Melbourne were on a short visit of 1-3 nights. A further 29% stayed for 4-7 nights while 23% stayed for 15 nights or more.

Length of Visit	Melbourne	Victoria
1-3 nights	35%	37%
4-7 nights	29%	28%
8-14 nights	13%	13%
15+ nights	23%	22%

Travel Party (% of international overnight visitors to Melbourne)

Fifty-six percent of international overnight visitors to Melbourne were travelling on their own and another 22% travelled as part of an adult couple.

Travel Party	Melbourne	Victoria
Travelling alone	56%	57%
Adult couple	22%	22%
Family (parents and children)	9%	9%
Other	13%	13%

Top 15 Activities (% of international overnight visitors to Melbourne)¹

The most popular activities that international overnight visitors to Melbourne enjoy are dining out (74%), sightseeing (63%), shopping for pleasure (60%), going to markets (31%), to pubs and clubs (29%), to the beach (28%), visiting museums and art galleries (25%), and botanical and other parks (23%) on their trip.

Activity	Melbourne	Victoria
Eat out	74%	70%
Sightseeing/looking around	63%	61%
Shopping for pleasure	60%	52%
Go to markets	31%	26%
Pubs / clubs / discos etc	29%	27%
Go to the beach	28%	29%
Visit museums or art galleries	25%	21%
Visit botanical or other public gardens	23%	19%
Visit historic buildings / sites	22%	19%
Visit national parks / state parks	21%	22%
Visit casinos	20%	16%
Visit wildlife parks / zoos / aquariums	16%	14%
Tourist trains	13%	10%
Attend Movies/Cinema	13%	11%
Go on guided tours or excursions	12%	10%

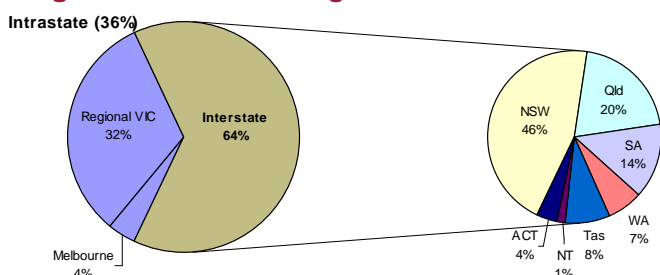
¹ Based on 3 years of data: January 2008 – December 2010.

PROFILE OF DOMESTIC OVERNIGHT VISITORS TO MELBOURNE

Destination preference

Twenty-one percent of Australians and 13% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to Melbourne in the next two years.

Origin of domestic overnight visitors to Melbourne



Interstate overnight visitors are the key market for Melbourne, accounting for 64% of total domestic overnight visitors to the region. This is primarily driven by the New South Wales market which comprises 46% of all interstate overnight visitors to the region. Intrastate overnight visitors, account for 36% of total domestic overnight visitors.

Age Group (% of domestic overnight visitors to Melbourne)

Domestic overnight visitors to Melbourne were most likely to be aged between 25-44 years (38%) or 45-64 years (35%).

Age Group	Melbourne	Victoria
15 - 24 years	15%	15%
25 - 44 years	38%	36%
45 - 64 years	35%	35%
65+ years	12%	14%

Lifecycle (% of domestic overnight visitors to Melbourne)

Domestic overnight visitors to Melbourne tended to be in the parent (41%) lifecycle.

Lifecycle	Melbourne	Victoria
Single, No Kids	17%	17%
Couple, No Kids	12%	12%
Parent	41%	39%
Older Working	16%	15%
Older Non-Working	15%	17%

Purpose of Visit (% of domestic overnight visitors to Melbourne)

Thirty-four percent of domestic overnight visitors to Melbourne were holiday or leisure visitors, 33% were visiting friends and relatives and 27% were visiting for business purposes.

Purpose of Visit	Melbourne	Victoria
Holiday or leisure	34%	47%
Visiting friends and relatives	33%	33%
Business	27%	17%
Other	6%	5%

Length of Visit (% of domestic overnight visitors to Melbourne)

Seventy-six percent of domestic overnight visitors to Melbourne were on a short visit of 1-3 nights. A further 20% stayed 4-7 nights.

Length of Visit	Melbourne	Victoria
1-3 nights	76%	74%
4-7 nights	20%	21%
8-14 nights	3%	4%
15+ nights	1%	1%

Travel party (% of domestic overnight visitors to Melbourne)

The majority of domestic overnight visitors to Melbourne travelled alone (33%), as an adult couple (26%), in a family group with parents and children (18%) or with friends or relatives (16%). When compared to visitors to Victoria generally, visitors to Melbourne were more likely to travel alone or with business associates.

Travel Party	Melbourne	Victoria
Travelling alone	33%	25%
Adult couple	26%	27%
Family group - parents and children	18%	23%
Friends or relatives	16%	19%
Business associates	7%	4%
Other	1%	2%

Seasonality of Trip (% of domestic overnight visitors to Melbourne)

Domestic overnight visitation seems to be relatively consistent throughout the year, with visitation being the highest in Winter (28%) followed closely by Spring (26%), and lowest in Summer and Autumn (23% each). Interestingly, Winter visitation to Melbourne is a higher proportion than visitors to Victoria generally in that season.

Month	Melbourne	Victoria
December	7%	7%
January	9%	13%
February	8%	7%
Summer	23%	27%
March	7%	9%
April	8%	9%
May	8%	7%
Autumn	23%	25%
June	10%	8%
July	9%	8%
August	9%	7%
Winter	28%	23%
September	8%	7%
October	8%	8%
November	10%	9%
Spring	26%	24%

Accommodation (% of domestic visitor nights in Melbourne)

Of all domestic visitor nights in Melbourne for 2010, 45% were spent with friends or relatives and 43% at a hotel, motel or serviced apartment.

Accommodation	Melbourne	Victoria
Hotel, motel or serviced apartment	43%	26%
Guest house or B&B	0%	1%
Rented house, apartment, flat or unit	4%	8%
Caravan park / camping (Commercial or private)	3%	15%
Friends or relatives property	45%	40%
Own property (e.g. holiday house)	1%	5%
Other	4%	5%

Top 15 Activities (% of domestic overnight visitors to Melbourne)

Compared to all domestic overnight visitors to Victoria generally, some of the activities that overnight visitors to Melbourne were more likely to do included dining out (65% compared to 57%), visiting friends and relatives (50% compared to 47%), shopping (38% compared to 30%), visiting museum or art galleries (10% compared to 7%), attending an organised sporting event (10% compared to 6%), attending theatre concerts or other performing arts (9% compared to 5%), and visiting casinos (6% compared to 2%).

Activity	Melbourne	Victoria
Eat out at restaurants	65%	57%
Visit friends and relatives	50%	47%
Go shopping (pleasure)	38%	30%
General sight seeing	21%	27%
Pubs clubs discos etc	16%	17%
Visit museums or art galleries	10%	7%
Attend an organised sporting event	10%	6%
Going to markets (street, weekend or art craft)	9%	8%
Attend theatre concerts or other performing arts	9%	5%
Visit casinos	6%	2%
Attend movies or cinema	4%	3%
Visit wildlife parks, zoos or aquariums	4%	3%
Go to the beach (including swimming)	4%	16%
Visit botanical or other public gardens	4%	3%
Go on a daytrip to another place	3%	5%

Roy Morgan Values Segments² (% of domestic overnight visitors to Melbourne)

Domestic overnight leisure visitors to Melbourne were more likely to come from the Visible Achievement (24%) or Socially Aware (24%) Values Segments.

Values Segments	Melbourne	Victoria
Basic Needs	1%	1%
Fairer Deal	2%	2%
Traditional Family Life	15%	18%
Conventional Family Life	11%	10%
'Look At Me'	7%	8%
Something Better	4%	5%
Real Conservatism	3%	4%
Young Optimism	9%	8%
Visible Achievement	24%	22%
Socially Aware	24%	23%

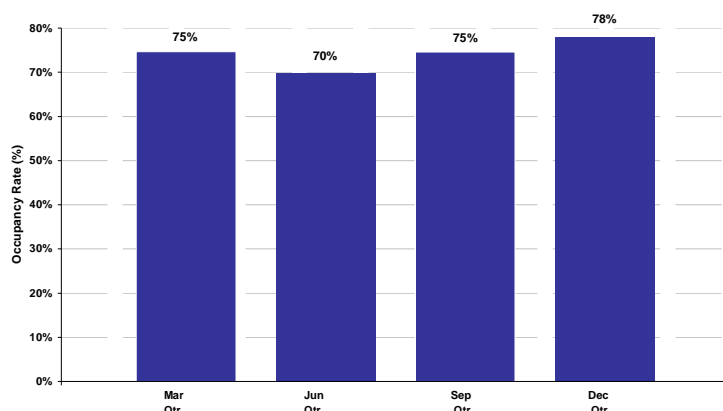
² Developed in conjunction with Colin Benjamin of the Horizons Network

Tourist Accommodation - supply and demand in Melbourne

- Based on the ABS Survey of Tourism Accommodation:
- There were 293 hotels/motels/serviced apartments with 15 or more rooms in the region as at the December quarter 2010. Total takings for 2010 from accommodation for these establishments were \$1.2 billion, and the average annual room occupancy was 74.3%.

	At December Quarter 2010		Year Ending December 2010		
	Establishments	Rooms/Sites Available	Room Nights Occupied ('000)	Average Occupancy Rate	Takings (\$'000)
Hotels/Motels/Serviced Apartments 15+ rooms	293	25,461	6,873	74.3%	\$1,178,211

- Peak occupancy for hotels, motels and serviced apartment of 15 or more rooms in 2010 occurred in the December quarter (78%).



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 Melbourne region also offers a number of smaller accommodation properties with less than 15 rooms including Bed and Breakfast properties. 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/7F1BCA4FD889E82CCA2577570016466?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
- *Domestic and International Tourism Expenditure in Australia's regions 2010*, Tourism Research Australia, Canberra
(TRA expenditure allocation method applied to 2010 National Visitor Survey data)
- *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.