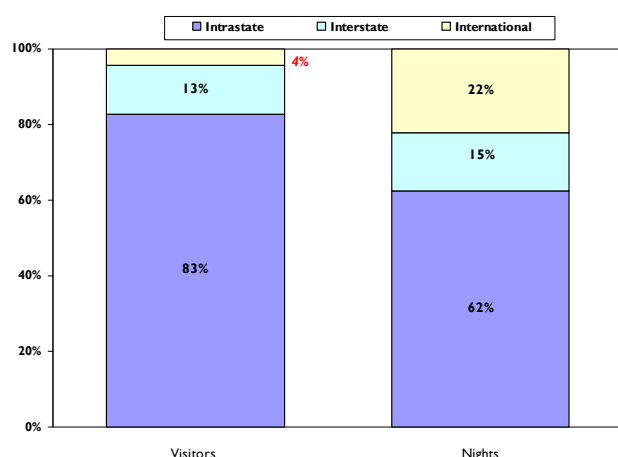


This fact sheet provides a summary of the latest tourism data for the Mornington Peninsula campaign region. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

### DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO THE MORNINGTON PENINSULA

Eighty-three percent of overnight visitors to the Mornington Peninsula were sourced from the intrastate market, followed by 13% from interstate.



Sixty-two percent of visitor nights in the Mornington Peninsula region were sourced from the intrastate market, followed by 22% from the international market and 15% from interstate.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
<b>Domestic</b>					
Overnight Visitors (000s)	1,121	1,100	874	-2.5% p.a.	-20.5%
Visitor Nights (000s)	3,365	3,361	2,666	-2.3% p.a.	-20.7%
Daytrip Visitors (000s)	3,972	3,323	2,881	-3.2% p.a.	-13.3%
<b>International</b>					
Overnight Visitors (000s)	18.9	35.8	38.9	+7.5% p.a.	+8.5%

\* Average Annual Growth

### Domestic Overnight Visitation

The Mornington Peninsula region received an estimated 874,000 domestic overnight visitors for the year ending December 2010. This was a decrease of 20.5% from 2009 to 2010. Nine percent of all domestic overnight visitors to regional Victoria visited the Mornington Peninsula.

The average annual change since 2000 was a decrease of 2.5% 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 2.7 million domestic visitor nights, a decrease of 20.7% from 2009 to 2010. The region had a 9% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 3.1 nights in 2010, unchanged from 2009.

The average annual change since 2000 was a decrease of 2.3% for domestic visitor nights to the region compared to a decrease of 1.2% for regional Victoria generally.

### Domestic Daytrip Visitation

There were an estimated 2.9 million domestic daytrip visitors to the Mornington Peninsula region in the year ending December 2010, a decrease of 13.3% from 2009 to 2010. Twelve percent of all domestic daytrips to/within regional Victoria visited the Mornington Peninsula.

### International Overnight Visitation

The Mornington Peninsula region received an estimated 38,900 international overnight visitors for the year ending December 2010. This was an increase of 8.5% from 2009 to 2010. Twelve percent of all international overnight visitors to regional Victoria visited the Mornington Peninsula.

The average annual growth since 2000 was 7.5% for international overnight visitors to the region compared to 2.1% for regional Victoria generally.

### Estimated International Daytrip visitors

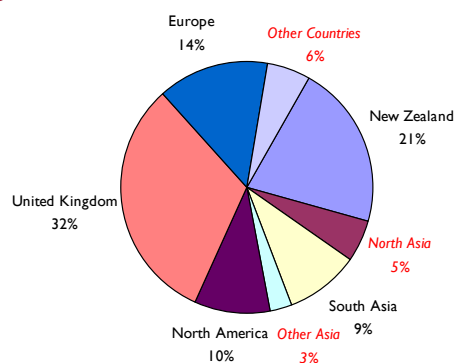
It is estimated that the Mornington Peninsula region received 99,400 international daytrip visitors in the year ending December 2010.

### 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 2.4% of the economy in the Mornington Peninsula region.

## PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO MORNINGTON PENINSULA

### Origin of international overnight visitors to the Mornington Peninsula\*



The largest source market of international overnight visitors to the Mornington Peninsula for the year ending December 2010 was the UK, accounting for 32% of international overnight visitors to the region. The next largest market for the region was New Zealand (21%), Europe (14%) and North America (10%).

### Age Group (% of international overnight visitors to the Mornington Peninsula)

International overnight visitors to the Mornington Peninsula were most likely to be aged between 45-64 years (40%) or 25-44 years (31%).

Age Group	MP	Regional Vic
15 - 24 years	15%	16%
25 - 44 years	31%	36%
45 - 64 years	40%	36%
65+ years	14%	11%

### Purpose of Visit (% of international overnight visitors to the Mornington Peninsula)

Thirty-four percent of international overnight visitors to the Mornington Peninsula were holiday visitors while 47% were visiting friends and relatives. Compared to all international overnight visitors to regional Victoria, visitors to this region were more likely to be visiting friends and relatives (47% compared to 30%) on their trip.

Purpose of Visit	MP	Regional Vic
Holiday or leisure	34%	53%
Visiting friends and relatives	47%	30%
Other	18%	17%

### Length of Visit (% of international overnight visitors to the Mornington Peninsula)

Only 26% percent of international overnight visitors to the Mornington Peninsula were on a short visit of 1-3 nights, compared to 54% of international overnight visitors to regional Victoria generally. The highest proportions were those on a trip of 4-7 nights (29%) and 15 or more nights (also 29%).

Length of Visit	MP	Regional Vic
1-3 nights	26%	54%
4-7 nights	29%	20%
8-14 nights	16%	10%
15+ nights	29%	16%

### Travel Party (% of international overnight visitors to the Mornington Peninsula)\*

Fifty-two percent of international overnight visitors to the Mornington Peninsula were travelling on their own and another 32% travelled as part of an adult couple.

Travel Party	MP	Regional Vic
Travelling alone	52%	49%
Adult couple	32%	32%
Family (parents and children)	9%	7%
Other	8%	12%

### Top 10 Activities (% of international overnight visitors to the Mornington Peninsula)^

Compared to all international overnight visitors to regional Victoria, overnight visitors to the Mornington Peninsula were more likely to dine out (68% compared to 58%), go to the beach (58% compared to 31%), go shopping (50% compared to 27%), to markets (16% compared to 8%) and visit wineries (13% compared to 7%) on their trip.

Activity	MP	Regional Vic
Eat out	68%	58%
Go to the beach	58%	31%
Shopping for pleasure	50%	27%
Sightseeing/looking around	47%	54%
Pubs / clubs / discos etc	21%	21%
Visit national parks / state parks	21%	26%
Go to markets	16%	8%
Visit wineries	13%	7%
Visit wildlife parks / zoos / aquariums	11%	8%
Visit botanical or other public gardens	10%	7%

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

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

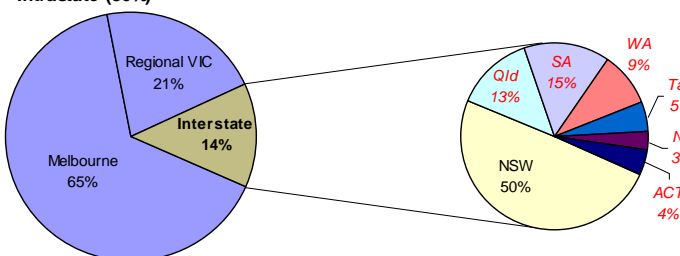
## PROFILE OF DOMESTIC OVERNIGHT VISITORS TO THE MORNINGTON PENINSULA

### Destination preference

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

### Origin of domestic overnight visitors to the Mornington Peninsula

Intrastate (86%)



Intrastate overnight visitors are the key market for the Mornington Peninsula region, accounting for 86% of total domestic overnight visitors. Interstate overnight visitors, accounting for 14% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 50% of all interstate visitors to the region.

### Age Group (% of domestic overnight visitors to the Mornington Peninsula)

Domestic overnight visitors to the Mornington Peninsula were most likely to be aged between 25-44 years (41%) or 45-64 years (37%).

Age Group	MP	Regional Vic
15 - 24 years	10%	14%
25 - 44 years	41%	35%
45 - 64 years	37%	35%
65+ years	12%	16%

### Lifecycle (% of domestic overnight visitors to the Mornington Peninsula)

Domestic overnight visitors to the Mornington Peninsula region tended to be in the parent (41%) lifecycle group.

Lifecycle	MP	Regional Vic
Single, No Kids	15%	17%
Couple, No Kids	14%	11%
Parent	41%	37%
Older Working	14%	15%
Older Non-Working	16%	20%

### Purpose of Visit (% of domestic overnight visitors to the Mornington Peninsula)

Sixty-seven percent of domestic overnight visitors to the Mornington Peninsula were holiday visitors and 27% were visiting friends and relatives.

Purpose of Visit	MP	Regional Vic
Holiday or leisure	67%	55%
Visiting friends and relatives	27%	33%
Business	4%	9%
Other	2%	4%

### Length of Visit (% of domestic overnight visitors to the Mornington Peninsula)

Seventy-eight percent of domestic overnight visitors to the Mornington Peninsula were on a short visit of 1-3 nights. A further 16% stayed 4-7 nights.

Length of Visit	MP	Regional Vic
1-3 nights	78%	76%
4-7 nights	16%	19%
8-14 nights	5%	4%
15+ nights	1%	1%

### Seasonality of Trip (% of domestic overnight visitors to the Mornington Peninsula)

Domestic overnight visitation to the region peaks during Summer, attracting the highest proportion of visitors (43%). This is a higher proportion than visitors to regional Victoria (30%). In contrast, Autumn had the lowest proportion of visitors to the region (17%).

Month	MP	Regional Vic
December	8%	8%
January	26%	15%
February	9%	7%
<b>Summer</b>	<b>43%</b>	<b>30%</b>
March	6%	10%
April	8%	11%
May	3%	6%
<b>Autumn</b>	<b>17%</b>	<b>26%</b>
June	9%	7%
July	5%	8%
August	6%	6%
<b>Winter</b>	<b>20%</b>	<b>21%</b>
September	6%	7%
October	7%	8%
November	7%	9%
<b>Spring</b>	<b>20%</b>	<b>24%</b>

### Travel party (% of domestic overnight visitors to the Mornington Peninsula)

The majority of visitors to the Mornington Peninsula region travelled as an adult couple (32%) or as a family group with parents and children (29%). When compared to visitors to regional Victoria, visitors to Mornington Peninsula were less likely to travel alone.

Travel Party	MP	Regional Vic
Travelling alone	15%	19%
Adult couple	32%	29%
Family group - parents and children	29%	27%
Friends or relatives	22%	21%
Business associates	1%	2%
Other	1%	2%

### Accommodation (% of domestic visitor nights in the Mornington Peninsula)<sup>1</sup>

Of all domestic visitor nights in the Mornington Peninsula region for 2010, 46% were spent with friends or relatives and 21% on their own property (eg. holiday house).

Accommodation	MP	Regional Vic
Hotel, motel or serviced apartment	8%	16%
Guest house or B&B	1%	2%
Rented house, apartment, flat or unit	12%	11%
Caravan park / camping (Commerical or private)	11%	22%
Friends or relatives property	46%	37%
Own property (e.g. holiday house)	21%	8%
Other	2%	5%

### Top 15 Activities (% of domestic overnight visitors to the Mornington Peninsula)

Compared to all domestic overnight visitors to regional Victoria, activities overnight visitors to the Mornington Peninsula region were more likely to do included going to the beach (54% compared to 23%), visiting friends and relatives (48% compared to 45%), shopping (30% compared to 24%) and visiting wineries (10% compared to 5%).

Activity	MP	Regional Vic
Go to the beach (including swimming)	54%	23%
Eat out at restaurants	49%	50%
Visit friends and relatives	48%	45%
Go shopping (pleasure)	30%	24%
General sight seeing	28%	30%
Pubs clubs discos etc	17%	18%
Visit national parks or State parks	10%	11%
Visit wineries	10%	5%
Picnics or BBQs	9%	7%
Going to markets (street, weekend or art craft)	8%	7%
Bushwalking or rainforest walks	7%	13%
Play other sports	6%	5%
Go on a daytrip to another place	5%	6%
Play golf	4%	3%
Visit museums or art galleries	3%	5%

<sup>1</sup> Based on 3 years of data: January 2008 – December 2010.

### Roy Morgan Values Segments<sup>2</sup> (% of domestic overnight visitors to the Mornington Peninsula)

Domestic overnight visitors to the Mornington Peninsula were more likely to come from the Socially Aware (32%), Visible Achievement (23%) and Traditional Family Life (16%) Values Segments.

Values Segments	MP	Regional Vic
Basic Needs	1%	1%
Fairer Deal	0%	2%
Traditional Family Life	16%	20%
Conventional Family Life	7%	10%
'Look At Me'	8%	9%
Something Better	5%	5%
Real Conservatism	2%	4%
Young Optimism	7%	6%
Visible Achievement	23%	22%
Socially Aware	32%	22%

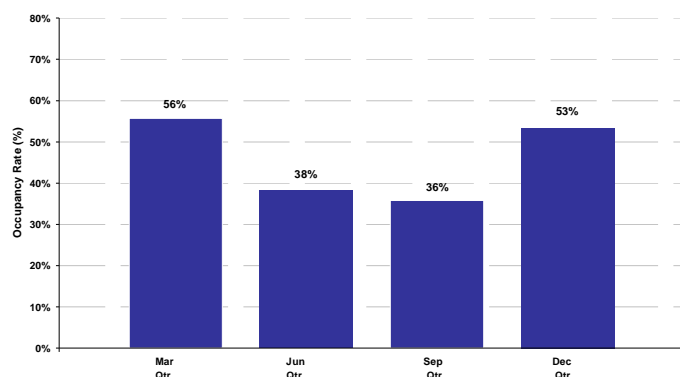
<sup>2</sup> Developed in conjunction with Colin Benjamin of the Horizons Network

### Tourist Accommodation - supply and demand in Mornington Peninsula

- Based on the ABS Survey of Tourism Accommodation:
- There were 26 hotels/motels/serviced apartments with 15 or more rooms in the region as at December 2010. Total takings for 2010 from accommodation for these establishments were \$21.5 million, and the average annual room occupancy was 45.8%.

	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	26	907	154	45.8%	\$21,521

- Peak occupancy for hotels, motels and serviced apartment of 15 or more rooms in 2010 occurred in the March quarter (56%).



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 Mornington Peninsula 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](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.