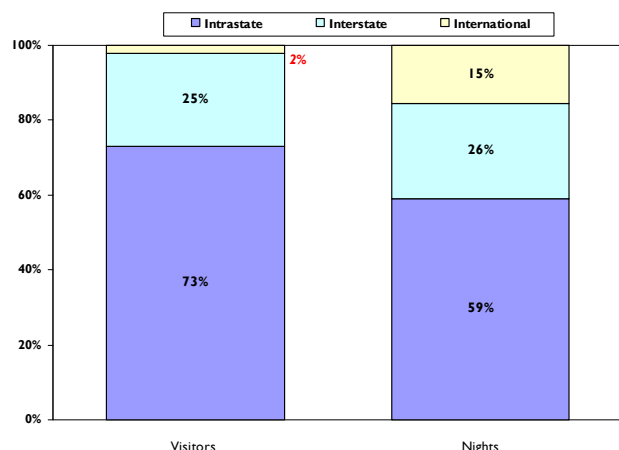


This fact sheet provides a summary of the latest tourism data for the Murray campaign region. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO THE MURRAY

Seventy-three percent of overnight visitors to the Murray were sourced from the intrastate market, followed by 25% from interstate and 2% from the international market.



Fifty-nine percent of visitor nights in the Murray region were sourced from the intrastate market, followed by 26% from interstate and 15% from the international market.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
Domestic					
Overnight Visitors (000s)	1,975	1,685	1,738	-1.3% p.a.	+3.1%
Visitor Nights (000s)	5,851	5,584	5,664	-0.3% p.a.	+1.4%
Daytrip Visitors (000s)	3,354	2,434	2,936	-1.3% p.a.	+20.6%
International					
Overnight Visitors (000s)	44.2	40.6	39.6	-1.1% p.a.	-2.4%

* Average Annual Growth

Domestic Overnight Visitation

The Murray region received an estimated 1.7 million domestic overnight visitors for the year ending December 2010. This was an increase of 3.1% from 2009 to 2010. Seventeen percent of all domestic overnight visitors to regional Victoria visited the Murray region.

The average annual change since 2000 was a decrease of 1.3% 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 5.7 million domestic visitor nights, an increase of 1.4% from 2009 to 2010. The region had an 18% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 3.3 nights in 2010, unchanged from 2009.

The average annual change since 2000 was a decrease of 0.3% 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 Murray region in the year ending December 2010, an increase of 20.6% from 2009 to 2010. Twelve percent of all domestic daytrips to/within regional Victoria visited the Murray region.

International Overnight Visitation

The Murray region received an estimated 39,600 international overnight visitors for the year ending December 2010. This was a decrease of 2.4% from 2009 to 2010. Twelve percent of all international overnight visitors to regional Victoria visited the Murray region.

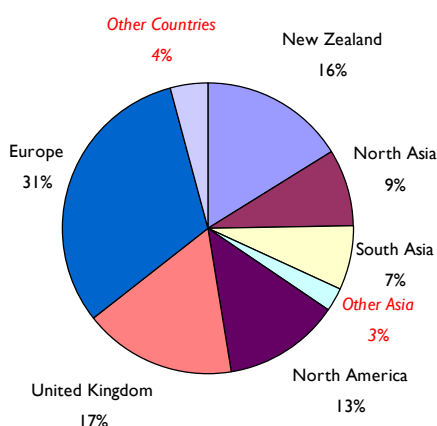
The average annual change since 2000 was a decrease of 1.1% for international overnight visitors to the region compared to an increase of 2.1% for regional Victoria generally.

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 4.2% of the economy in the Murray region.

PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO MURRAY

Origin (% of international overnight visitors to the Murray)*



The largest source market of international overnight visitors to the Murray for the year ending December 2010 was Europe accounting for 31% of international overnight visitors to the region. The next largest market for the region was the UK (17%) and New Zealand (16%).

Age Group (% of international overnight visitors to the Murray)

International overnight visitors to the Murray were most likely to be aged between 25-44 years (41%) or 45-64 years (30%).

Age Group	Murray	Regional Vic
15 - 24 years	22%	16%
25 - 44 years	41%	36%
45 - 64 years	30%	36%
65+ years	7%	11%

Purpose of Visit (% of international overnight visitors to the Murray)

Fifty-four percent of international overnight visitors to the Murray were holiday or leisure visitors and 25% were visiting friends and relatives.

Purpose of Visit	Murray	Regional Vic
Holiday or leisure	54%	53%
Visiting friends and relatives	25%	30%
Other	21%	17%

Length of Visit (% of international overnight visitors to the Murray)

Forty-two percent of international overnight visitors to the Murray were on a short visit of 1-3 nights. Reflecting the size and location of the region, 29% were on a trip of 15 or more nights (compared to 16% for international overnight visitors to regional Victoria generally).

Length of Visit	Murray	Regional Vic
1-3 nights	42%	54%
4-7 nights	16%	20%
8-14 nights	14%	10%
15+ nights	29%	16%

Travel Party (% of international overnight visitors to the Murray)*

Sixty-one percent of international overnight visitors to the Murray were traveling on their own and another 25% travelled as part of an adult couple.

Travel Party	Murray	Regional Vic
Travelling alone	61%	49%
Adult couple	25%	32%
Family (parents and children)	5%	7%
Other	9%	12%

Top 10 Activities (% of international overnight visitors to the Murray)^

Compared to all international overnight visitors to regional Victoria generally, overnight visitors to the Murray were more likely to enjoy going to pubs and clubs (32% compared to 21%), visiting farms (16% compared to 8%), going to wineries (11% compared to 7%) and using a charter boat/cruise/ferry (10% compared to 4%) on their trip.

Activity	Murray	Regional Vic
Eat out	48%	58%
Sightseeing/looking around	45%	54%
Pubs / clubs / discos etc	32%	21%
Shopping for pleasure	18%	27%
Visit farms	16%	8%
Bushwalking / rainforest walks	12%	17%
Visit wineries	11%	7%
Charter boat / cruise / ferry	10%	4%
Visit historic buildings / sites	9%	9%
Go to markets	8%	8%

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

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

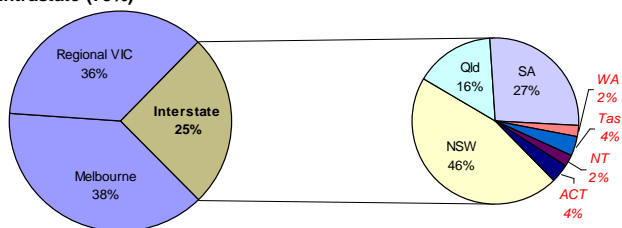
PROFILE OF DOMESTIC OVERNIGHT VISITORS TO THE MURRAY

Destination preference

Seven percent of Australians and 17% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to the Murray region in the next two years.

Origin of domestic overnight visitors to the Murray

Intrastate (75%)



Intrastate overnight visitors are the key market for the Murray region, accounting for 75% of total domestic overnight visitors. Interstate overnight visitors, accounting for 25% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 46% of all interstate visitors to the region.

Age Group (% of domestic overnight visitors to the Murray)

Domestic overnight visitors to the Murray were most likely to be aged between 25-44 years (35%) or 45-64 years (36%).

Age Group	Murray	Regional Vic
15 - 24 years	12%	14%
25 - 44 years	35%	35%
45 - 64 years	36%	35%
65+ years	18%	16%

Lifecycle (% of domestic overnight visitors to the Murray)

Domestic overnight visitors to the Murray region tended to be in the parent (39%) and older – non working (24%) lifecycles.

Lifecycle	Murray	Regional Vic
Single, No Kids	12%	17%
Couple, No Kids	10%	11%
Parent	39%	37%
Older Working	16%	15%
Older Non-Working	24%	20%

Purpose of Visit (% of domestic overnight visitors to the Murray)

Forty-eight percent of domestic overnight visitors to the Murray were holiday or leisure visitors and 37% were visiting friends and relatives.

Purpose of Visit	Murray	Regional Vic
Holiday or leisure	48%	55%
Visiting friends and relatives	37%	33%
Business	10%	9%
Other	5%	4%

Length of Visit (% of domestic overnight visitors to the Murray)

Seventy-two percent of domestic overnight visitors to the Murray were on a short visit of 1-3 nights. A further 23% stayed 4-7 nights.

Length of Visit	Murray	Regional Vic
1-3 nights	72%	76%
4-7 nights	23%	19%
8-14 nights	5%	4%
15+ nights	1%	1%

Seasonality of Trip (% of domestic overnight visitors to the Murray)

Domestic overnight visitation to the region peaks during Spring, attracting the highest proportion of visitors (28%). Winter has the lowest proportion of visitors to the region (21%).

Month	Murray	Regional Vic
December	8%	8%
January	12%	15%
February	7%	7%
Summer	26%	30%
March	8%	10%
April	11%	11%
May	7%	6%
Autumn	26%	26%
June	7%	7%
July	7%	8%
August	6%	6%
Winter	21%	21%
September	8%	7%
October	10%	8%
November	9%	9%
Spring	28%	24%

Travel party (% of domestic overnight visitors to the Murray)

Generally, the majority of domestic overnight visitors to the Murray region travelled as an adult couple (30%), in a family group with parents and children (26%) or with friends or relatives (21%).

Travel Party	Murray	Regional Vic
Travelling alone	19%	19%
Adult couple	30%	29%
Family group - parents and children	26%	27%
Friends or relatives	21%	21%
Business associates	2%	2%
Other	2%	2%

Accommodation (% of domestic visitor nights in the Murray)

Of all domestic visitor nights in the Murray region for 2010, 33% were spent with friends or relatives, 28% in a caravan or camping (commercial or private ground) and 23% at a hotel, motel or serviced apartment.

Accommodation	Murray	Regional Vic
Friends or relatives property	33%	37%
Caravan park / camping (Commercial or private)	28%	22%
Hotel, motel or serviced apartment	23%	16%
Other	7%	5%
Rented house, apartment, flat or unit	6%	11%
Own property (e.g. holiday house)	2%	8%
Guest house or B&B	0%	2%

Top 15 Activities (% of domestic overnight visitors to the Murray)

Compared to all domestic overnight visitors to regional Victoria, overnight visitors to the Murray region were slightly more likely to go to the pub, club or disco (21% compared to 18%), to go fishing (10% compared to 7%), to do water activities and sports (8% compared to 4%), to play other sports (6% compared to 5%), and visit wineries (6% compared to 5%) among other activities on their trip.

Activity	Murray	Regional Vic
Eat out at restaurants	48%	50%
Visit friends and relatives	44%	45%
General sight seeing	28%	30%
Go shopping (pleasure)	24%	24%
Pubs clubs discos etc	21%	18%
Go fishing	10%	7%
Water activities or sports	8%	4%
Bushwalking or rainforest walks	8%	13%
Picnics or BBQs	7%	7%
Play other sports	6%	5%
Visit wineries	6%	5%
Exercise, gym or swimming at a local pool, river or creek	5%	4%
Go on a daytrip to another place	5%	6%
Visit history, heritage buildings sites or monuments	5%	5%
Visit national parks or State parks	5%	11%

Roy Morgan Values Segments¹ (% of domestic overnight leisure visitors to the Murray)

Domestic overnight leisure visitors to the Murray were most likely to come from the Traditional Family Life (24%), Visible Achievement (20%) and Socially Aware (17%) Values Segments.

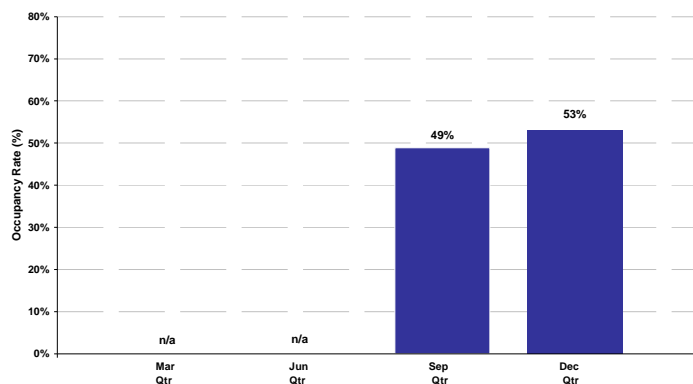
Values Segments	Murray	Regional Vic
Basic Needs	1%	1%
Fairer Deal	3%	2%
Traditional Family Life	24%	20%
Conventional Family Life	10%	10%
'Look At Me'	11%	9%
Something Better	5%	5%
Real Conservatism	5%	4%
Young Optimism	5%	6%
Visible Achievement	20%	22%
Socially Aware	17%	22%

¹ Developed in conjunction with Colin Benjamin of the Horizons Network

Tourist Accommodation - supply and demand in the Murray

- Based on the ABS Survey of Tourism Accommodation:
- There were 105 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 (\$'000)
Hotels/Motels/Serviced Apartments 15+ rooms	105	3,065	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 Murray 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.
- Note 3: There was a definitional change in 2010. Indigo is now included in the Victoria's High Country region (was previously in the Murray region). All back data has been adjusted to reflect this change.

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.