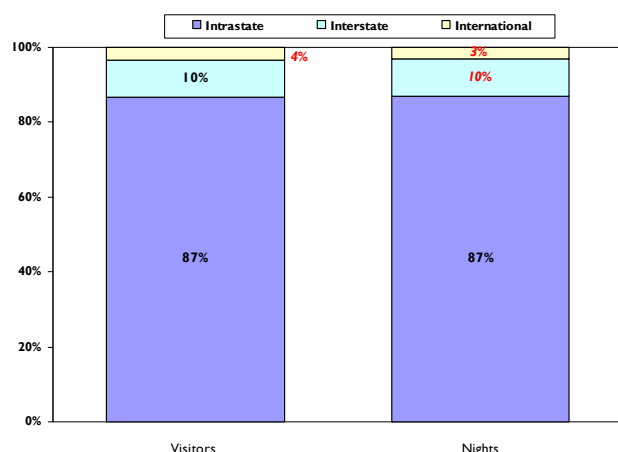


This fact sheet provides a summary of the latest tourism data for Phillip Island campaign region. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

DOMESTIC & INTERNATIONAL OVERNIGHT VISITATION TO PHILLIP ISLAND

Eighty-seven percent of overnight visitors to Phillip Island were sourced from the intrastate market, followed by 10% from interstate and 4% from the international market.



Eighty-seven percent of visitor nights in the Phillip Island region were sourced from the intrastate market, followed by 10% from interstate and 3% from the international market.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
Domestic					
Overnight Visitors (000s)	757	656	639	-1.7% p.a.	-2.6%
Visitor Nights (000s)	1,963	1,882	2,067	+0.5% p.a.	+9.8%
Daytrip Visitors (000s)	1,269	1,088	848	-4.0% p.a.	-22.1%
International					
Overnight Visitors (000s)	33.7	29.7	23.2	-3.6% p.a.	-21.7%

* Average Annual Growth

Domestic Overnight Visitation

The Phillip Island region received an estimated 639,000 domestic overnight visitors for the year ending December 2010. This was a decrease of 2.6% from 2009 to 2010. Six percent of all domestic overnight visitors to regional Victoria visited the Phillip Island region.

The average annual change since 2000 was a decline of 1.7% for domestic overnight visitation to the region compared to a decline of 2.0% for regional Victoria generally.

Domestic Visitor Nights

For the year ending December 2010 the region received an estimated 2.1 million domestic visitor nights, an increase of 9.8% from 2009 to 2010. The region had a 7% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 3.2 nights in 2010, up from 2.9 nights in 2009.

The average annual increase since 2000 was 0.5% for domestic visitor nights to the region, compared to a decline of 1.2% for regional Victoria generally.

Domestic Daytrip Visitation

There were an estimated 848,000 domestic daytrip visitors to the Phillip Island region in the year ending December 2010. This was a strong decline of 22.1% from 2009 to 2010. Three percent of all domestic daytrips to/within regional Victoria visited the Phillip Island region.

International Overnight Visitation

The Phillip Island region received approximately 23,200 international overnight visitors for the year ending December 2010, a decline of 21.7% from 2009 to 2010. Seven percent of all international overnight visitors to regional Victoria visited the Phillip Island region.

The average annual change since 2000 was a decrease of 3.6% for international overnight visitors to the region compared to an increase of 2.1% for regional Victoria generally.

Estimated International Daytrip visitors

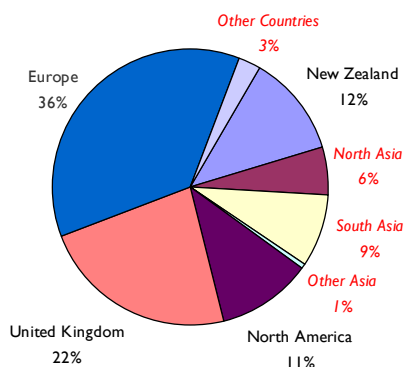
It is estimated that the Phillip Island region received 273,700 international daytrip visitors in the year ending December 2010.

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 18.7% of the economy in the Phillip Island region.

PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO PHILLIP ISLAND

Origin (% of international overnight visitors to Phillip Island)*



The largest source market of international overnight visitors to Phillip Island for the year ending December 2010 was Europe, accounting for 36% of international overnight visitors to the region. The next largest market for the region was the UK, accounting for 22%.

Age Group (% of international overnight visitors to Phillip Island)*

International overnight visitors to Phillip Island were most likely to be aged between 25-44 years (40%) or 45-64 years (35%).

Age Group	Phillip Island	Regional Vic
15 - 24 years	18%	16%
25 - 44 years	40%	36%
45 - 64 years	35%	36%
65+ years	8%	11%

Purpose of Visit (% of international overnight visitors to Phillip Island)

Sixty-two percent of international overnight visitors to Phillip Island were holiday or leisure visitors and 27% were visiting friends and relatives.

Purpose of Visit	Phillip Island	Regional Vic
Holiday or leisure	62%	53%
Visiting friends and relatives	27%	30%
Other	11%	17%

Length of Visit (% of international overnight visitors to Phillip Island)*

Seventy-eight percent of international overnight visitors to Phillip Island were on a short visit of 1-3 nights. A further 16% stayed for 4-7 nights.

Length of Visit	Phillip Island	Regional Vic
1-3 nights	78%	54%
4-7 nights	16%	20%
8-14 nights	4%	10%
15+ nights	2%	16%

Travel Party (% of international overnight visitors to Phillip Island)*

The majority of international overnight visitors to Phillip Island were travelling as part of an adult couple or on their own (both 40%).

Travel Party	Phillip Island	Regional Vic
Travelling alone	40%	49%
Adult couple	40%	32%
Family (parents and children)	8%	7%
Other	13%	12%

Top 10 Activities (% of international overnight visitors to Phillip Island)^

Compared to all international overnight visitors to regional Victoria generally, overnight visitors to Phillip Island were more likely to go sightseeing (60% compared to 54%), to the beach (53% compared to 31%), visit national or State parks (37% compared to 26%), visit wildlife parks, zoos or aquariums (33% compared to 8%), and to go on a guided tour or excursion (6% compared to 3%).

Activity	Phillip Island	Regional Vic
Sightseeing/looking around	60%	54%
Eat out	53%	58%
Go to the beach	53%	31%
Visit national parks / state parks	37%	26%
Visit wildlife parks / zoos / aquariums	33%	8%
Shopping for pleasure	23%	27%
Bushwalking / rainforest walks	13%	17%
Pubs / clubs / discos etc	12%	21%
Other sports	7%	3%
Go on guided tours or excursions	6%	3%

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

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

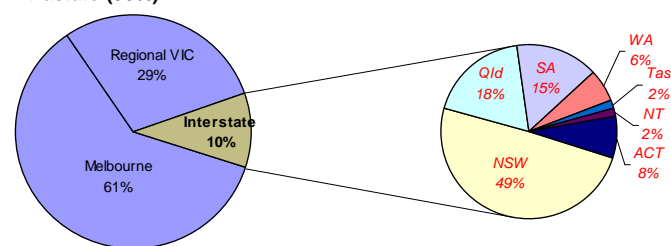
PROFILE OF DOMESTIC OVERNIGHT VISITORS TO PHILLIP ISLAND

Destination preference

Six percent of Australians and 15% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to the Phillip Island region in the next two years.

Origin of domestic overnight visitors to Phillip Island

Intrastate (90%)



Intrastate overnight visitors are the key market for the Phillip Island region, accounting for 90% of total domestic overnight visitors. Interstate overnight visitors, accounting for 10% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 49% of all interstate visitors to the region.

Age Group (% of domestic overnight visitors to Phillip Island)

Domestic overnight visitors to Phillip Island were most likely to be aged between 25-44 years or 45-64 years (34%).

Age Group	Phillip Island	Regional Vic
15 - 24 years	20%	14%
25 - 44 years	34%	35%
45 - 64 years	34%	35%
65+ years	13%	16%

Lifecycle (% of domestic overnight visitors to Phillip Island)

Domestic overnight visitors to the Phillip Island region tended to be in the parent (39%), and the single – no kids (22%) lifecycle groups.

Lifecycle	Phillip Island	Regional Vic
Single, No Kids	22%	17%
Couple, No Kids	11%	11%
Parent	39%	37%
Older Working	14%	15%
Older Non-Working	14%	20%

Purpose of Visit (% of domestic overnight visitors to Phillip Island)

Seventy-two percent of domestic overnight visitors to Phillip Island were holiday or leisure visitors and 17% were visiting friends and relatives.

Purpose of Visit	Phillip Island	Regional Vic
Holiday or leisure	72%	55%
Visiting friends and relatives	17%	33%
Business	9%	9%
Other	3%	4%

Length of Visit (% of domestic overnight visitors to Phillip Island)

Seventy-five percent of domestic overnight visitors to Phillip Island were on a short visit of 1-3 nights. A further 21% stayed 4-7 nights.

Length of Visit	Phillip Island	Regional Vic
1-3 nights	75%	76%
4-7 nights	21%	19%
8-14 nights	2%	4%
15+ nights	2%	1%

Seasonality of trip (% of domestic overnight visitors to Phillip Island)¹

Domestic overnight visitation to the region peaks during Summer, attracting the highest proportion of visitors (36%). This is a higher proportion than visitors to regional Victoria (30%). In contrast, Winter has the lowest proportion of visitors to the region (18%).

Month	Phillip Island	Regional Vic
December	9%	8%
January	20%	15%
February	7%	7%
Summer	36%	30%
March	11%	10%
April	8%	11%
May	5%	6%
Autumn	24%	26%
June	7%	7%
July	7%	8%
August	4%	6%
Winter	18%	21%
September	6%	7%
October	8%	8%
November	8%	9%
Spring	22%	24%

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

Travel party (% of domestic overnight visitors to Phillip Island)

The majority of visitors to the Phillip Island region travelled as a family group with parents and children or as an adult couple (34% and 31% respectively). When compared to visitors to regional Victoria, visitors to Phillip Island were more likely to travel as a family group and less likely to travel alone.

Travel Party	Phillip Island	Regional Vic
Travelling alone	12%	19%
Adult couple	31%	29%
Family group - parents and children	34%	27%
Friends or relatives	19%	21%
Business associates	3%	2%
Other	1%	2%

Accommodation (% of domestic visitor nights in Phillip Island)²

Of all domestic visitor nights in the Phillip Island region for 2010, 30% were spent with friends or relatives, and 21% in own property (eg. Holiday house). When compared to visitor nights spent in regional Victoria, visitors to Phillip Island were more likely to stay in their own property or in a rental property (house, apartment, flat or unit), and less likely to stay with friends or relatives or in a caravan park or camping ground.

Accommodation	Phillip Island	Regional Vic
Friends or relatives property	30%	37%
Own property (e.g. holiday house)	21%	8%
Caravan park / camping (Commercial or private)	18%	22%
Rented house, apartment, flat or unit	18%	11%
Hotel, motel or serviced apartment	11%	16%
Other	2%	5%
Guest house or B&B	1%	2%

Top 15 Activities (% of domestic overnight visitors to Phillip Island)

Compared to all domestic overnight visitors to regional Victoria generally, overnight visitors to the Phillip Island region were more likely to go to the beach (60% compared to 23%), dine out (56% compared to 50%), go sightseeing (35% compared to 30%), go shopping (26% compared to 24%), go to pubs and clubs (19% compared to 18%), visit wildlife parks, zoos and aquariums (12% compared to 2%), visit national or State parks (12% compared to 11%), and go to markets (8% compared to 7%) among other activities while on their trip.

Activity	Phillip Island	Regional Vic
Go to the beach (including swimming)	60%	23%
Eat out at restaurants	56%	50%
Visit friends and relatives	35%	45%
General sight seeing	35%	30%
Go shopping (pleasure)	26%	24%
Pubs clubs discos etc	19%	18%
Visit wildlife parks, zoos or aquariums	12%	2%
Visit national parks or State parks	12%	11%
Bushwalking or rainforest walks	9%	13%
Going to markets (street, weekend or art craft)	8%	7%
Go fishing	8%	7%
Picnics or BBQs	7%	7%
Go on a daytrip to another place	5%	6%
Exercise, gym or swimming at a local pool, river or creek	5%	4%
Play other sports	5%	5%

Roy Morgan Values Segments³ (% of domestic overnight leisure visitors to Phillip Island)

Domestic overnight leisure visitors to Phillip Island were most likely to come from the Visible Achievement (24%) or Socially Aware (23%) Values Segments.

Values Segments	Phillip Island	Regional Vic
Basic Needs	0%	1%
Fairer Deal	1%	2%
Traditional Family Life	14%	20%
Conventional Family Life	10%	10%
'Look At Me'	10%	9%
Something Better	4%	5%
Real Conservatism	2%	4%
Young Optimism	11%	6%
Visible Achievement	24%	22%
Socially Aware	23%	22%

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

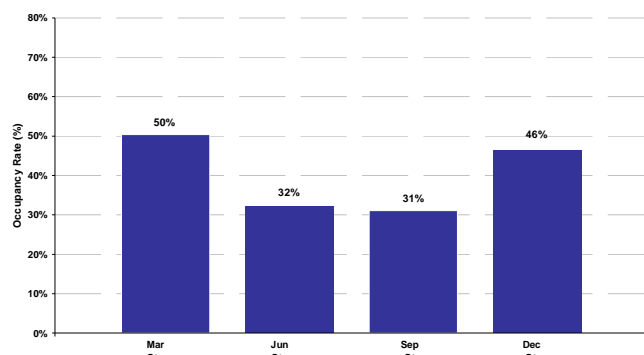
³ Developed in conjunction with Colin Benjamin of the Horizons Network

Tourist Accommodation - supply and demand in Phillip Island

- Based on the ABS Survey of Tourism Accommodation:
- There were 13 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 \$17.8 million, and the average annual room occupancy was 40.0%.

	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	13	736	110	40.0%	\$17,812

- Peak occupancies for both hotels/motels and caravan parks in 2010 occurred in the March quarter (50%).



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 Phillip Island 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.