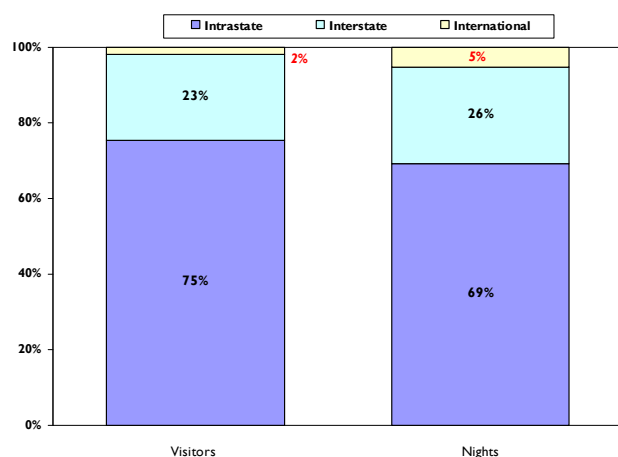


Victoria's High Country Market Profile Year Ending December 2010

This fact sheet provides a summary of the latest tourism data for Victoria's High Country 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 VICTORIA'S HIGH COUNTRY

Seventy-five percent of overnight visitors to Victoria's High Country were sourced from the intrastate market, followed by 23% from interstate and 2% from the international market.



Sixty-nine percent of visitor nights in Victoria's High Country were sourced from the intrastate market, followed by 26% from interstate and 5% from the international market.

Year ending December	2000	2009	2010	AAG* 00/10	% change 09/10
Domestic					
Overnight Visitors (000s)	1,146	1,086	981	-1.5% p.a.	-9.7%
Visitor Nights (000s)	3,386	3,143	3,005	-1.2% p.a.	-4.4%
Daytrip Visitors (000s)	1,683	1,131	1,108	-4.1% p.a.	-2.0%
International					
Overnight Visitors (000s)	23.9	21.6	19.6	-2.0% p.a.	-9.5%

* Average Annual Growth

Domestic Overnight Visitation

Victoria's High Country received an estimated 981,000 domestic overnight visitors for the year ending December 2010. This was a decrease of 9.7% from 2009 to 2010. Ten percent of all domestic overnight visitors to regional Victoria visited Victoria's High Country.

The average annual change since 2000 was a decrease of 1.5% 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 3.0 million domestic visitor nights, a decrease of 4.4% from 2009 to 2010. The region had a 10% market share of all domestic visitor nights to regional Victoria.

The average length of stay was 3.1 nights in 2010, up from 2.9 in 2009.

The average annual change since 2000 was a decrease of 1.2% 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 1.1 million domestic daytrip visitors to Victoria's High Country in the year ending December 2010, a decrease of 2.0% from 2009 to 2010. Five percent of all domestic daytrips to/within regional Victoria visited Victoria's High Country.

International Overnight Visitation

Victoria's High Country region received an estimated 19,600 international overnight visitors for the year ending December 2010. This was a decrease of 9.5% from 2009 to 2010. Six percent of all international overnight visitors to regional Victoria visited Victoria's High Country.

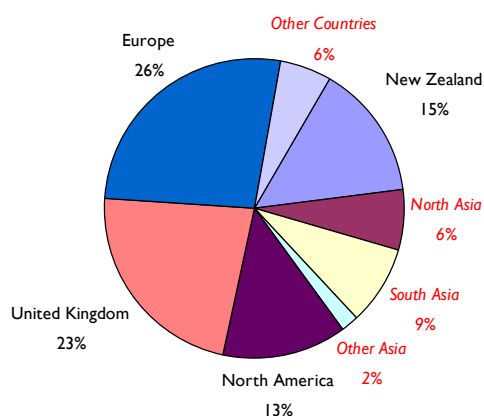
The average annual change since 2000 was a decrease of 2.0% for international overnight visitors to the region compared to an increase of 2.1% for regional Victoria generally.

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 7.2% of the economy in Victoria's High Country.

PROFILE OF INTERNATIONAL OVERNIGHT VISITORS TO VICTORIA'S HIGH COUNTRY

Origin (% of international overnight visitors to Victoria's High Country)*



The largest source markets of visitors to Victoria's High Country for the year ending December 2010 was Europe and the United Kingdom, accounting for 26% and 23% respectively of international overnight visitors to the region.

Age Group (% of international overnight visitors to Victoria's High Country)*

International overnight visitors to Victoria's High Country were most likely to be aged between 25-44 years or 45-64 years (both 35%).

Age Group	VHC	Regional Vic
15 - 24 years	13%	16%
25 - 44 years	35%	36%
45 - 64 years	35%	36%
65+ years	16%	11%

Purpose of Visit (% of international overnight visitors to Victoria's High Country)

Fifty percent of international overnight visitors to Victoria's High Country were holiday visitors.

Purpose of Visit	VHC	Regional Vic
Holiday or leisure	50%	53%
Visiting friends and relatives	33%	30%
Other	17%	17%

Length of Visit (% of international overnight visitors to Victoria's High Country)*

Sixty-four percent of international overnight visitors to Victoria's High Country were on a short visit of 1-3 nights.

Length of Visit	VHC	Regional Vic
1-3 nights	64%	54%
4-7 nights	16%	20%
8-14 nights	7%	10%
15+ nights	13%	16%

Travel Party (% of international overnight visitors to Victoria's High Country)*

Fifty-two percent of international overnight visitors to Victoria's High Country were travelling on their own and another 28% traveled as part of an adult couple.

Travel Party	VHC	Regional Vic
Travelling alone	52%	49%
Adult couple	28%	32%
Family (parents and children)	9%	7%
Other	11%	12%

Top 10 Activities (% of international overnight visitors to Victoria's High Country)^

Compared to all international overnight visitors to regional Victoria, overnight visitors to Victoria's High Country were more likely to enjoy dining out (60% compared to 58%), to go sightseeing (56% compared to 54%), to visit national and state parks (30% compared to 26%), go to pubs, clubs and discos (24% compared to 21%), to take part in snow sports (13% compared to 1%) visit farms (13% compared to 8%) and go to the markets (10% compared to 8%) on their trip.

Activity	VHC	Regional Vic
Eat out	60%	58%
Sightseeing/looking around	56%	54%
Visit national parks / state parks	30%	26%
Shopping for pleasure	26%	27%
Pubs / clubs / discos etc	24%	21%
Bushwalking / rainforest walks	16%	17%
Snow sports	13%	1%
Visit farms	13%	8%
Go to markets	10%	8%
Visit wineries	7%	7%

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

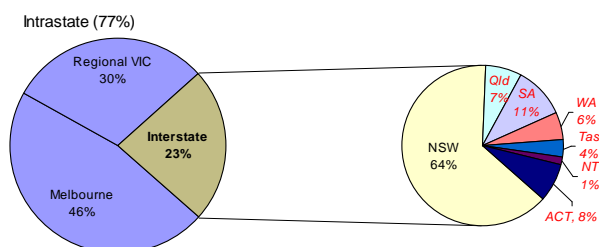
^ Based on 3 years of data: January 2008 – December 2010.

PROFILE OF DOMESTIC OVERNIGHT VISITORS TO VICTORIA'S HIGH COUNTRY

Destination preference

Ten percent of Australians and 24% of Victorians (aged 14 years +) indicated that they would like to take a leisure trip of one or more nights to Victoria's High Country region in the next two years.

Origin of domestic overnight visitors to Victoria's High Country



Intra-state overnight visitors are the key market for Victoria's High Country, accounting for 77% of total domestic overnight visitors. Interstate overnight visitors, accounting for 23% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 64% of all interstate overnight visitors to the region.

Age Group (% of domestic overnight visitors to Victoria's High Country)

Domestic overnight visitors to Victoria's High Country were most likely to be aged between 25-44 (34%) or 45-64 years (32%).

Age Group	VHC	Regional Vic
15 - 24 years	14%	14%
25 - 44 years	34%	35%
45 - 64 years	32%	35%
65+ years	19%	16%

Lifecycle (% of domestic overnight visitors to Victoria's High Country)

Domestic overnight visitors to Victoria's High Country tended to be in the parent (33%) and single – no kids (21%) lifestyles.

Lifecycle	VHC	Regional Vic
Single, No Kids	16%	17%
Couple, No Kids	13%	11%
Parent	33%	37%
Older Working	17%	15%
Older Non-Working	21%	20%

Purpose of Visit (% of domestic overnight visitors to Victoria's High Country)

Sixty-nine percent of domestic overnight visitors to Victoria's High Country were holiday visitors and 21% were visiting friends and relatives.

Purpose of Visit	VHC	Regional Vic
Holiday or leisure	69%	55%
Visiting friends and relatives	21%	33%
Business	7%	9%
Other	4%	4%

Length of Visit (% of domestic overnight visitors to Victoria's High Country)

Seventy-three percent of domestic overnight visitors to Victoria's High Country were on a short visit of 1-3 nights. A further 24% stayed 4-7 nights.

Length of Visit	VHC	Regional Vic
1-3 nights	73%	76%
4-7 nights	24%	19%
8-14 nights	3%	4%
15+ nights	1%	1%

Seasonality of Trip (% of domestic overnight visitors to Victoria's High Country)

Domestic overnight visitation to the region is generally consistent across the seasons with a peak during Winter, attracting the highest proportion of visitors (26%). This is a higher proportion than visitors to regional Victoria generally during the Winter season (21%). Spring experienced the lowest proportion of visitors to the region (23%).

Month	VHC	Regional Vic
December	9%	8%
January	12%	15%
February	5%	7%
Summer	25%	30%
March	7%	10%
April	13%	11%
May	7%	6%
Autumn	26%	26%
June	5%	7%
July	10%	8%
August	11%	6%
Winter	26%	21%
September	7%	7%
October	7%	8%
November	9%	9%
Spring	23%	24%

Victoria's High Country

Market Profile Year Ending December 2010

Travel party (% of domestic overnight visitors to Victoria's High Country)

The majority of visitors to Victoria's High Country traveled with friends or relatives or as an adult couple (both 28%). When compared to visitors to regional Victoria, visitors to Victoria's High Country were more likely to travel with friends and relatives (28% compared to 21%) and less likely to travel alone (14% compared to 19%).

Travel Party	VHC	Regional Vic
Travelling alone	14%	19%
Adult couple	28%	29%
Family group - parents and children	25%	27%
Friends or relatives	28%	21%
Business associates	2%	2%
Other	3%	2%

Accommodation (% of domestic visitor nights in Victoria's High Country)¹

Of all domestic visitor nights in Victoria's High Country for 2010, 27% were spent with friends or relatives and 23% at a hotel, motel or serviced apartment.

Accommodation	VHC	Regional Vic
Friends or relatives property	27%	37%
Hotel, motel or serviced apartment	23%	16%
Caravan park / camping (Commercial or private)	21%	22%
Rented house, apartment, flat or unit	15%	11%
Own property (e.g. holiday house)	6%	8%
Other	5%	5%
Guest house or B&B	3%	2%

Top 15 Activities (% of domestic overnight visitors to Victoria's High Country)

Compared to all domestic overnight visitors to regional Victoria, overnight visitors to Victoria's High Country were more likely to enjoy dining out (52% compared to 50%), go sightseeing (34% compared to 30%), visit state or national parks (19% compared to 11%), go on bush or rainforest walks (18% compared to 13%), go snow skiing (14% compared to 1%) and to visit wineries (13% compared to 5%) among other activities on their trip.

Activity	VHC	Regional Vic
Eat out at restaurants	52%	50%
General sight seeing	34%	30%
Visit friends and relatives	28%	45%
Go shopping (pleasure)	19%	24%
Visit national parks or State parks	19%	11%
Bushwalking or rainforest walks	18%	13%
Pubs clubs discos etc	17%	18%
Snow skiing	14%	1%
Visit wineries	13%	5%
Play other sports	8%	5%
Other outdoor activities (e.g. horse riding, rock climbing, bungee jumping, four wheel driving or reef walking etc)	8%	3%
Picnics or BBQs	7%	7%
Going to markets (street, weekend or art craft)	6%	7%
Go on a daytrip to another place	6%	6%
Visit history, heritage buildings sites or monuments	6%	5%

Roy Morgan Values Segments² (% of domestic overnight visitors to Victoria's High Country)

Domestic overnight leisure visitors to Victoria's High Country were more likely to come from the Socially Aware (30%), Visible Achievement (20%), and Traditional Family Life (16%) Values Segments.

Values Segments	VHC	Regional Vic
Basic Needs	1%	1%
Fairer Deal	0%	2%
Traditional Family Life	16%	20%
Conventional Family Life	11%	10%
'Look At Me'	5%	9%
Something Better	3%	5%
Real Conservatism	5%	4%
Young Optimism	8%	6%
Visible Achievement	20%	22%
Socially Aware	30%	22%

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

² Developed in conjunction with Colin Benjamin of the Horizons Network

Victoria's High Country

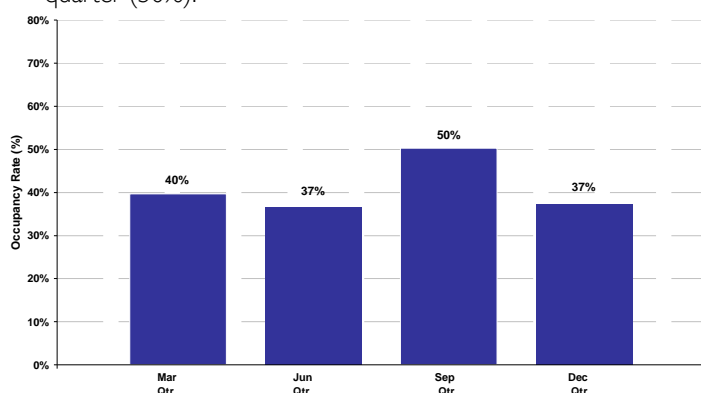
Market Profile Year Ending December 2010

Tourist Accommodation - supply and demand in Victoria's High Country

- Based on the ABS Survey of Tourism Accommodation:
- There were 81 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 \$43.3 million, and the average annual room occupancy was 41.0%.

	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	81	2,279	269	41.0%	\$43,275

- Peak occupancy for hotels, motels and serviced apartment of 15 or more rooms in 2010 occurred in the September 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 Victoria's High Country 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.