

STRATEGIC MARKETING PLAN



2005 - 2008

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EXECUTIVE SUMMARY

The Goldfields region consists of two Level One Destinations, Ballarat and Bendigo, a level three Destination - Avoca, and a number of type A and B Villages - Castlemaine, Maldon, Maryborough, Clunes, Dunolly and Creswick.

A touring region, the Goldfields product strengths include Golden Heritage, Streetscape & Architecture, Arts & Culture, Parks & Gardens, Food & Wine and Festivals & Events.

Goldfields geographic target markets are intrastate, and Interstate - South Australia, Regional NSW, Canberra & Tasmania. International markets include New Zealand, Singapore, Europe (UK / Germany), USA and Japan.

The Goldfields region targets the following value segments - Traditional Family Life, Socially Aware and Visible Achiever.

The key objective of the Goldfields Campaign Committee over the duration of this three-year marketing plan is to position Goldfields as Australia's premier region to experience history and heritage.

Specific strategies for the 2005-2006 period include:

- Continue to highlight history and heritage as a point of difference for the region.
- Raise awareness of the value of tourism and engagement, and participation of businesses and consumers.
- Maintain a high standard of visitor services and foster improvements at supporting locations.
- Facilitate development of arts, cultural heritage related product to support the re-energising of the Goldfields image.
- Maximise the tourism benefits from existing and new events

STATEMENT OF PURPOSE

1. The name of the incorporated association is Goldfields Tourism Incorporated.
2. The purposes for which the incorporated association is established are:-
 - (a) To manage and implement on behalf of the Goldfields region the Regional Partnership Program and to be responsible for the appropriate usage of funds from that program.
 - (b) To develop and implement a marketing plan in accordance with the Goldfields General Service Agreement, as applied, to attract additional visitation to the Goldfields region, as defined by the Committee.

SECTION A – BACKGROUND

I INTRODUCTION

CURRENT STRUCTURE AND MANAGEMENT

The Regional Partnership Program (RPP) formerly known as RCMP will be managed and funded by Tourism Victoria.

The main objective of the RPP is to facilitate the integrated marketing of regional Victoria, with a focus on key destinations and products – as described in Victoria's Tourism Industry Strategic Plan 2002-2006.

A higher level of advice and resources is available to Committees via the Regional Marketing Managers (RMMs). The RMMs provide a facilitating role in the development of marketing strategies.

Committees are incorporated bodies established to develop and implement a regional marketing campaign for their product region in accordance with the Regional Partnership Program Guidelines.

GOLDFIELDS TOURISM'S ROLE

1. Leadership – this includes providing strategic direction to local and regional tourism associations at a Campaign Region level and educating tourism operators in regard to the benefits co-operative marketing and accreditation.
2. Co-operative marketing – this includes the development and implementation of a three-year Strategic Marketing Plan and one-year Marketing Action Plan. Also the development of tourism or travel product such as packages and touring routes.
3. Communication – this includes communicating with the local/regional tourism industry, local government, community and other stakeholders about Campaign Committee activities and ensuring that the Campaign Committee works in co-operation with Regional Tourism Associations.

The above strategies will be implemented with the guidance from Fiona Symmons, Goldfields Regional Marketing Manager.

The Campaign Committee is a skills based Board of representatives selected from expressions of interest. Representatives were chosen due to their:

- Level of tourism and marketing expertise;
- Ability to communicate to the broader tourism community;
- Knowledge of the tourism industry;
- Vision for the future of the tourism industry; and
- Commitment to development of co-operative marketing

RESOURCES

Committee

See Appendix I

Personnel

Project Administrator

Marketing

Tourism Victoria Regional Marketing Manager – Fiona Symmons

Tourism Victoria's Goldfields Team

Financial resources

Income sources for Goldfields include:

- Regional Partnership Program
- Government grants (outside the RPP) eg, Regional Tourism Online Program, Regional Infrastructure Development Program, Regional Association Program, Community Support Fund
- Industry contributions eg, jigsaw brochure, marketing programs, cooperative advertising
- Sponsorship
- Local government : City of Ballarat, City of Greater Bendigo, Mount Alexander Shire, Central Goldfields Shire, Pyrenees Shire
- Parks Victoria, Heritage Victoria

Goldfields Tourist Associations

Ballarat Tourism

Bendigo Tourism

Clunes Tourist & Development Association

Pyrenees Tourism

Creswick Tourist Association

Ballarat Tourist Association

Waranga Regional Tourism Association

Heathcote Tourism and Development

Beaufort Business & Tourism Association

Avoca Business & Tourism Association

Loddon Tourism Association

Goldfields Regional Accredited Visitor Information Centres

Ararat

Avoca

Ballarat

Beaufort

Bendigo

Castlemaine

Maryborough

Heathcote

Maldon

The Goldfields Campaign Committee has actively introduced a policy that encourages involvement from across the geographic spread within the region. This policy has been implemented to ensure that representation is given to each 'sub-region' of the Goldfields and to assist in facilitating a 'big picture' approach to marketing of the region.

2 VICTORIAN TOURISM INDUSTRY STRATEGIC PLAN 2002 - 2006

STATE-WIDE MARKETING ALIGNMENT

The Victorian Tourism Industry Strategic Plan 2002-2006 (VTISP) sets key directions for Victoria's dynamic tourism industry over the next five years and seeks to preserve Victoria's competitive edge.

The strategies contained in the VTISP were developed after close consultation with the tourism industry and will be delivered by industry in co-operation with Tourism Victoria and other key players.

The VTISP aims to move regional tourism to a new level by increasing the focus on key destinations and attractions and continuing the focus on Victoria's identified product strengths.

The Goldfields region three year Strategic Marketing Plan has therefore also been developed with the aim of integrating those State-wide strategies that have a direct relevance to this region.

For further details, The VTISP may be viewed at:

http://www.tourismvictoria.com.au/strategicplan/plan2002_2006/index1.htm

SPECIFIC RELEVANCE TO THE GOLDFIELDS REGION 3 YEAR STRATEGIC MARKETING PLAN

A major element of marketing regional Victoria is the shift in focus from geographical regions to key destinations. The VTISP has created a hierarchy of destinations and villages that will form the basis of priority marketing and promotion by Tourism Victoria over the life of the Plan.

This hierarchy has been determined using a set of criteria, as well as applying the critical success factors for regional tourism as assessed by Tourism Victoria. Special interest destinations and villages are rated Level 1, 2 or 3 or Type A or B.

The following has been identified for **Goldfields region**.

Regional Destinations & Villages Hierarchy			
Destinations	Level	Villages	Type
Ballarat	1	Castlemaine	A
Bendigo	1	Maldon	B
Avoca	3	Clunes	B
		Maryborough	B
		Dunolly	B
		Creswick	B

Source: Victoria's Tourism Industry Strategic Plan 2002-2006

* Note: (Daylesford, Ararat and Stawell are integrated in the Goldfields campaign as they are all on the border of the region)

3 MARKET ANALYSIS

TOURISM OVERVIEW – AUSTRALIA AND VICTORIA

Tourism is one of the largest and fastest growing industries, not only for Victoria and Australia, but the world. Australia received 4.8 million international visitor arrivals for the year ending December 2004, a 9% increase compared to the previous year. Forecasts for the industry remain strong, with total visitor arrivals to Australia forecast to grow by 6.9% in 2005, with average annual growth for the period 2005 to 2014 forecast at 5.8%¹.

A total of 1.3 million international visitors travelled to Victoria in the year ending December 2004, representing a market share of international visitors to Australia of 27.4%. The top 5 international markets for visitor arrivals to Victoria were New Zealand (17%), the United Kingdom (16%), the USA (9%), China (9%) and Singapore (5%)².

International visitor nights in Victoria for the year ending December 2004 totalled 28.7 million, representing a market share of 21.8% of visitor nights in Australia. International visitor expenditure in Victoria in 2004 is estimated to be \$2.6 billion.³

Domestic forecasts assume the competitiveness of overseas destinations, in terms of both price and appeal, will be significant in 2005 leading to some switching away from domestic travel toward outbound travel. Consequently, domestic visitor nights within Australia are forecast to grow by 0.2% in 2005, with average annual growth forecast at 0.9% for the period 2005 to 2014 inclusive. For the year ending December 2004, Victoria received 17.8 million domestic overnight visitors, representing a market share of 24.0%. Of these visitors, Victoria received 5.2 million interstate visitors and 12.6 million intrastate visitors, a market share of 22.0% and 24.9% respectively.

Victoria received 54.9 million domestic visitor nights in 2004, representing a market share of 18.5%. Of these visitor nights, Victoria received 22.1 million interstate nights and 32.7 million intrastate nights, a market share of 15.6% and 21.2% respectively⁴. Intrastate visitor expenditure in Victoria in 2004 is estimated at \$4.6 billion, while interstate visitor expenditure in Victoria in 2004 is estimated at \$3.1 billion.⁵

There were 30.7 million daytrips undertaken by domestic visitors to Victoria in 2004, with domestic daytrip expenditure valued at \$2.6 billion.⁶

¹ April 2005 Forecast, Tourism Forecasting Committee

² International Visitor Survey, Tourism Research Australia, year ending December 2004

³ International Tourism Expenditure in Australia's regions 1999-2003, Tourism Research Australia (applied to 2004 IVS data)

⁴ National Visitor Survey, Tourism Research Australia, year ending December 2004

⁵ Domestic Tourism Expenditure in Australia's regions 2001-2003, Tourism Research Australia. (applied to 2004 NVS data)

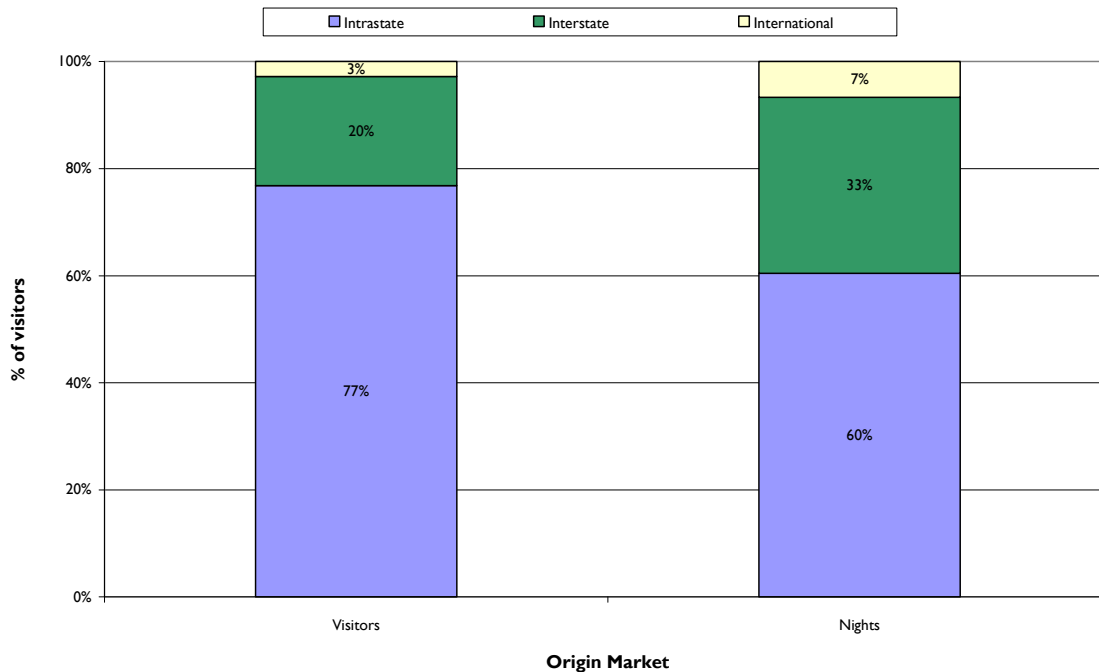
⁶ Domestic Tourism Expenditure in Australia's regions 2001-2003, Tourism Research Australia. (applied to 2004 NVS data)

TOURISM OVERVIEW – REGIONAL VICTORIA

Regional Victoria received approximately 12.2 million domestic overnight visitors for the year ending December 2004, with expenditure estimated at \$3.4 billion⁷. For the year ending December 2004, there were 20.6 million daytrips undertaken in regional Victoria, with daytrip visitor expenditure valued at \$1.5 billion.⁸

Regional Victoria received 330,500 international overnight visitors in the year ending December 2004, with visitor expenditure generated through international tourism in regional Victoria estimated at \$300 million.⁹

TOURISM OVERVIEW - GOLDFIELDS



Source: International and National Visitor Surveys, Tourism Research Australia, year ending December 2004

Visitors to Goldfields	1999	2000	2001	2002	2003	2004
Domestic Overnight Visitors						
Visitors ('000)	1,262	1,600	1,366	1,430	1,515	1,468
Nights ('000)	2,634	3,348	3,191	3,720	3,643	3,610
Average Length of Stay (nights)	2.1	2.1	2.3	2.6	2.4	2.5
Domestic Daytrip Visitors						
Visitors ('000)	3,948	3,976	3,589	3,424	3,233	2,862
International Overnight Visitors						
Visitors ('000)	35.6	39.1	39.3	38.0	43.9	42.6

Source: International and National Visitor Surveys, Tourism Research Australia, year ending December 1999-2004

⁷ National Visitor Survey, Tourism Research Australia, year ending December 2004

⁸ Domestic Tourism Expenditure in Australia's regions 2001-2003, Tourism Research Australia. (applied to 2004 NVS data)

⁹ International Tourism Expenditure in Australia's regions 1999, Bureau of Tourism Research (applied to 2003 IVS data)

Domestic Overnight Visitors

- The Goldfields received 1.5 million domestic overnight visitors for the year ending December 2004. The region has a 12% market share of all domestic visitors to regional Victoria.
- In 2004 the region received 3.6 million domestic visitor nights. The average length of stay increased in 2004 to 2.5 nights, compared to 2.4 nights in 2003.
- Domestic overnight expenditure in the Goldfields region in 2003 is estimated to be \$344 million, with visitors spending on average \$94 per night and \$224 per visit.

Daytrip Visitors

- There were 2.9 million daytrips undertaken by domestic visitors to The Goldfields region in 2004. The region has a 14% market share of all domestic daytrips to regional Victoria.
- Domestic daytrip visitors spent over \$258 million in the region in 2003, spending on average \$80 per day trip.

International Visitors

- The Goldfields received almost 43,000 international visitors for the year ending December 2004. The region has a 13% market share of all international visitors to regional Victoria.
- Key international source markets for the region are continental Europe, New Zealand, the USA and the United Kingdom.
- International visitors to the Goldfields region spent \$28.8 million during 2003, spending on average \$665 per visit.

Domestic Visitation by Region

- Of the 1.5 million domestic overnight visitors to the region in 2004, 79% originated from Victoria, with 21% from interstate. Interstate visitors accounted for a larger share of visitor nights based on longer length of stay.
- The Goldfields ranks fourth in terms of domestic overnight visitation and fifth in domestic visitor nights compared with other provincial Victorian campaign regions.

	1999	2000	2001	2002	2003	2004	Av. Annual % change	% change 03-04
Total Victoria	16,670	17,974	18,142	18,036	18,024	17,800	+1.3%	-1.2%
Regional Victoria	11,605	12,200	12,281	12,424	12,420	12,218	+1.0%	-1.6%
Victoria's Campaign Regions								
Gippsland	1,474	1,682	1,657	1,686	1,779	1,802	+4.1%	+1.3%
Goldfields	1,262	1,600	1,366	1,430	1,515	1,468	+3.1%	-3.1%
Grampians	910	717	742	755	704	739	-4.1%	+5.0%
Great Ocean Road	2,508	2,682	2,642	2,876	2,681	2,588	+0.6%	-3.5%
Legends, Wine & High Country	976	1,033	918	1,090	951	1,014	+0.8%	+6.6%
Macedon Ranges & Spa Country	430	449	433	473	501	465	+1.6%	-7.2%
Melbourne	5,550	6,233	6,416	6,115	6,212	6,113	+2.0%	-1.6%
Mornington Peninsula	1,198	1,121	1,347	988	1,211	1,121	-1.3%	-7.4%
Murray	2,182	2,093	2,387	2,211	2,404	2,460	+2.4%	+2.3%
Phillip Island	711	757	623	772	761	666	-1.3%	-12.5%
Yarra Valley, Dandenongs & The Ranges	551	566	531	625	520	556	+0.2%	+6.9%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

Domestic Visitation by Sub-region

- Bendigo Loddon received 819,000 domestic overnight visitors for the year ending December 2004, totalling almost 2.3 million visitor nights. 81% of visitors originated from Victoria, with 19% from interstate.
- Ballarat received 674,000 domestic overnight visitors for the year ending December 2003, totalling over 1.3 million visitor nights. 75% of visitors originated from Victoria, with 25% from interstate.

Domestic Overnight Visitors							
	Visitors			Nights			Average Length of Stay
	Visitors ('000)	% Intra	% Inter	Nights ('000)	% Intra	% Inter	
Ballarat	674	75%	25%	1,335	69%	31%	2.0
Bendigo Loddon	819	81%	19%	2,275	63%	38%	2.8
Central Highlands	327	74%	26%	938	73%	27%	2.9
Central Murray	871	84%	16%	2,508	80%	20%	2.9
Geelong	879	82%	18%	2,261	75%	25%	2.6
Gippsland	1,180	85%	15%	3,171	80%	20%	2.7
Goulburn	556	78%	22%	1,376	68%	32%	2.5
High Country	1,014	81%	19%	2,955	75%	25%	2.9
Lakes	681	81%	19%	2,129	83%	17%	3.1
Macedon	199	85%	15%	522	70%	30%	2.6
Mallee	752	64%	36%	2,261	60%	40%	3.0
Melbourne East	299	75%	25%	832	61%	39%	2.8
Murray East	375	47%	53%	934	49%	51%	2.5
Peninsula	1,121	87%	13%	3,644	78%	22%	3.3
Phillip Island	666	94%	6%	1,909	90%	10%	2.9
Spa Country	266	89%	11%	560	89%	11%	2.1
Upper Yarra	257	97%	3%	720	95%	5%	2.8
Western	1,752	86%	14%	4,889	86%	14%	2.8
Western Grampians	313	67%	33%	846	71%	29%	2.7
Wimmera	123	89%	11%	295	94%	6%	2.4
Total	12,218	84%	16%	36,733	76%	24%	3.0

Source: National Visitor Survey, Bureau of Tourism Research, year ending December 2003

Additional research is contained in Appendix 2.

4. COMPETITOR ANALYSIS

Region	Nature of Competition	Degree of Threat	Cooperation Opportunities
Melbourne	Melbourne Aquarium, Melbourne Zoo, Special Events, Scienceworks	Primary	Destination Melbourne Melbourne and Surrounds
Great Ocean Road	Melbourne's Bays & Peninsulas – beach/water activities, shopping (surf shops)	Primary	Great Southern Touring Route
The Grampians	Nature based activities , wildlife, wineries	Primary	Great Grape Road
Echuca	Family destination, water activities	Primary	Capital and Country Touring Route
Other Victorian destinations outside of those identified as Primary competitor destinations		Secondary	
Interstate destinations – New South Wales, Queensland, South Australia and Tasmania		Secondary	
Other Australian regions – Tasmania and South Australia	Heritage, Car Touring regions	Secondary	

SECTION B – STRATEGIC DIRECTION

5. VISION

By 2010 the Goldfields region will be recognised as regional Australia's premier heritage tourism region and regional Victoria's events capital.

6. OBJECTIVES

The objectives for the Goldfields region are to:

General

- Demonstrate engagement of the wider community in tourism activities.

Industry Development

- Encourage local government to build upon its proactive tourism industry development and management policies.
- Strengthen local tourism association structures and the relationship between regional tourism associations and local government.

Excellence in Service Delivery

- Encourage greater industry performance through increased participation in business development programs, for example increase the number of accredited businesses in the Goldfields region.
- Benchmark and improve visitor satisfaction with product and service delivery.
- Increase the number of Goldfields operators entering the annual Victorian Tourism Awards.
- Increase the number of Goldfields product listings on visitvictoria.com.

Product Development

- Develop and improve the key product attributes in the Goldfields.

Infrastructure

- Support development of quality tourism infrastructure that will:
 - match market needs
 - enhance tourism product strengths
 - maximise tourism product strengths
 - offer a triple bottom line competitive advantage
 - address regional development priorities
- Support new investment, development and upgrades to existing product linked to the region's character and theme (for example Sovereign Hill and a Bendigo night experience).
- Support the increase appropriate accommodation in and near wineries.

Marketing

- Increase visitor yield.
- Increase brand equity of Victoria's Goldfields region and strengthen its positioning as regional Australia's premier region to experience 'history and heritage' (measure through the Regional Awareness & Perception Survey)
- Improve visitor dispersal (geographical and seasonal) throughout the region.
- Increase participation in cooperative marketing campaigns.
- Increase intrastate visitor night numbers from 2.67 million in 2003 up to 3 million by 2007.
- Increase interstate visitor night numbers from 1.06 million in 2003 up to 1.2 million by 2007.
- Increase international visitor numbers from 44,411 in 2003 up to 58,000 by 2007.
- Increase market share of all domestic visitor nights in the Goldfields region from 1.3% in 2003 up to 1.5% by 2007.
- Increase market share of all international visitor nights in the Goldfields region from 1.0% in 2003 up to 1.1% by 2007.

7. TARGET MARKETS¹⁰

Target Markets		Product Strengths
Domestic	International	
<p>Geographical</p> <ul style="list-style-type: none"> • Intrastate • Adelaide / SA • South Australia • Regional NSW • Canberra • Tasmania <p>Value Segments</p> <ul style="list-style-type: none"> • Socially Aware • Visible Achievers • Traditional Family Life 	<ul style="list-style-type: none"> • Singapore • Europe (UK/Germany) • USA • Japan • New Zealand 	<ul style="list-style-type: none"> • History & heritage • Arts & Culture • Food & Wine • Touring • Festivals & Events • Parks & Gardens • Shopping

The key marketing strategies to be undertaken by the Goldfields Campaign Committee over the duration of the three-year marketing plan include positioning Goldfields as Australia's premier region to experience history and heritage. Activities to be undertaken as part of this strategy include developing a suite of Goldfields branded collateral and a Goldfields touring campaign which encompasses level one destinations and villages in conjunction with Tourism Victoria's touring campaign.

¹⁰ Goldfields Regional Tourism Development Plan 2004 - 2007

8. PRODUCT

REGIONAL PRODUCT STRENGTHS

Destination	Levels	Regional Victoria's Product Strengths					
		Festivals & Events	Parks & Gardens	Arts, Cultural Heritage	Shopping	Wine & Food	Touring
Ballarat	Level 1	<ul style="list-style-type: none"> • Rodeo & Ute Muster • Organs of the Ballarat Goldfields • Ballarat Gift • Super Southern Swap Meet • Ballarat Antique Fair • Ballarat Begonia Festival • Ballarat Film Festival • Ballarat Autumn Day Ride • Ballarat Wine Show • Ballarat Eureka Stamp & Coin Fair • Ballarat Orchid Club Spring Show • Australian Plants Society Ballarat Flower Show • Festival of Flowers & Music • Ballarat Chinese Festival Day • Ballarat Cup Carnival • Ballarat Road Rodders Rod Run • Ballarat Garden Fiesta • Eureka Week 	<ul style="list-style-type: none"> • Botanical Gardens • Kirks Reservoir • Yuulong Lavender Estate (Mt Egerton) • Ballarat Bird World • Buninyong Botanical Gardens • National and regional parks 	<ul style="list-style-type: none"> • Sovereign Hill • Blood on the Southern Cross • The Eureka Centre • Gold Museum • Ballarat Fine Art Gallery • Botanical Gardens • Lake Wendouree • Heritage Streetscapes 	<ul style="list-style-type: none"> • The Mining Exchange Gold Shop • Antiques & Collectables • Woolshed Antiques • C V Jones Antiques & Gallery • Antique Effects 	<ul style="list-style-type: none"> • Wineries <ul style="list-style-type: none"> - Dulcinea - Mt Beckworth - Eastern Peake - Yellowglen • Tozers Restaurant 	<ul style="list-style-type: none"> • Great Southern Touring Route • Goldfields Touring Route • Great Grape Road • Great Dividing Trail

Destination	Levels	Regional Victoria's Product Strengths					
		Festivals & Events	Parks & Gardens	Arts, Cultural Heritage	Shopping	Wine & Food	Touring
Bendigo	Level 1	<ul style="list-style-type: none"> Bendigo Easter Festival Bendigo Heritage Uncorked Heathcote Wine and Food Festival Bendigo International Madison The Italians Commonwealth Games 2006 Cecil Beaton Exhibition (2005/06) Queer Film Festival Australian Sheep and Wool Show 	<ul style="list-style-type: none"> Botanical Gardens Rosalind Park National and regional parks 	<ul style="list-style-type: none"> Bendigo Art Gallery Central Deborah Mine Talking Tram Bendigo Pottery & Interpretive Centre Golden Dragon Museum Bendigo Tramways Museum Private Art Galleries 	<ul style="list-style-type: none"> Bendigo Pottery Vixen and Dee Boutique Antiques and Collectables Bendigo Art Gallery Shop Bendigo's Hat Shop Bath Lane Precinct View St Precinct 	<ul style="list-style-type: none"> Heathcote Bazzani Ristorante Shiraz Wineries Whirrakee Restaurant Georgies Restaurant Wine Bank on View The Bridge Goldmines Hotel 	<ul style="list-style-type: none"> Bendigo Winemakers Trail Goldfields Touring Route Great Dividing Trail Capital and Country Touring Route Vine to Vintage Trail
Pyrenees	Level 3	<ul style="list-style-type: none"> Taltarni Cup Pink Lamb, Purple Shiraz Race Meeting Vignerons Day – Race Meeting Secudtion by Tastebuds Victorian Concert Orchestra @ Blue Pyrenees Estate Brass on the Grass @ Beaufort 		<ul style="list-style-type: none"> Berripmo Walk – Mount Cole Old Mill Gallery – Avoca Main Streetscape - Avoca 	<ul style="list-style-type: none"> Olive & Lavender Shop – Avoca Times of Yore - Avoca 	<ul style="list-style-type: none"> Warrenmang Vineyard Resort Rainbow Gallery Red Earth Café @ Taltarni Quoin Hill Vineyard Cafe 	<ul style="list-style-type: none"> Great Grape Touring Route Great Southern Touring Route Goldfields Touring Route Great Dividing Trail

Destination	Levels	Regional Victoria's Product Strengths					
		Festivals & Events	Parks & Gardens	Arts, Cultural Heritage	Shopping	Wine & Food	Touring
Castlemaine	Type A	<ul style="list-style-type: none"> • Castlemaine Swap Meet • Castlemaine Street Rod Event • Castlemaine State Festival (Biennial) • Bendigo Winemakers Festival (Castlemaine) • Heritage Festival – Castlemaine, Maldon & Surrounds • Castlemaine Rotary Art Show • Castlemaine Alternative Festival • Castlemaine Lancia Rally (Biennial) • Fringe Festival • Castlemaine & District Festival of Gardens • Castlemaine Truck Show 	<ul style="list-style-type: none"> • Botanical Gardens • Buda Historic Home & Garden • Kaweka Wildflower Reserve • Kalimna Park • National and regional parks 	<ul style="list-style-type: none"> • Castlemaine Diggings National Heritage Park • Castlemaine Art Gallery & Historical Museum • Castlemaine Botanical Gardens • Buda Historic Home & Garden • Private Art Galleries 	<ul style="list-style-type: none"> • The Restorers Barn • XXXX Antique Complex 	<ul style="list-style-type: none"> • Wineries • Saffs Café • Togs Café 	<ul style="list-style-type: none"> • Goldfields Touring Route • Great Dividing Trail • Mount Alexander Diggings Trails

Destination	Levels	Regional Victoria's Product Strengths					
		Festivals & Events	Parks & Gardens	Arts, Cultural Heritage	Shopping	Wine & Food	Touring
Maldon	Type B	<ul style="list-style-type: none"> • Gear Grinders Motorfest • Maldon Easter Fair • Mt Tarrengower Hill Climb • Maldon Folk Festival 	<ul style="list-style-type: none"> • Maldon Historic Reserve 	<ul style="list-style-type: none"> • Carmen's Tunnel • Victorian Goldfields Railway • Maldon Historic Reserve • Maldon Historic Museum • Private Art Galleries 	<ul style="list-style-type: none"> • Maldon Old Grain Store Antique Market • Lavender Lace & Living • Village Patch 	<ul style="list-style-type: none"> • Wineries • Ruby's Restaurant • Penny School Gallery & Cafe 	<ul style="list-style-type: none"> • Goldfields Touring Route
Clunes	Type B	<ul style="list-style-type: none"> • Clunes Alternative Fair 		<ul style="list-style-type: none"> • The Clunes Bottle Museum & Tourist Information • Clunes Museum • Genealogy 			<ul style="list-style-type: none"> • Goldfields Touring Route
Maryborough	Type B	<ul style="list-style-type: none"> • Redwood Classic Harness Racing • Antique & Bottle Collectors Fair • Gold 'n Wattle Festival • Maryborough Highland Gathering 	<ul style="list-style-type: none"> • Bristol Hill Reserve • Paddy's Ranges State Park 	<ul style="list-style-type: none"> • Worsley Cottage & Museum • Private Art Galleries 	<ul style="list-style-type: none"> • Maryborough Railway Station 		<ul style="list-style-type: none"> • Goldfields Touring Route
Dunolly	Type B		<ul style="list-style-type: none"> • Laanecoorie Reservoir 	<ul style="list-style-type: none"> • Dunolly's Goldfields Historical Arts Museum 			<ul style="list-style-type: none"> • Goldfields Touring Route
Creswick	Type B	<ul style="list-style-type: none"> • Creswick Forestry Fiesta 	<ul style="list-style-type: none"> • Calembreen Park • St Georges Lake • Tangled Maze • Tumblers Green 	<ul style="list-style-type: none"> • Creswick Museum • Private Art Galleries • Springmount Pottery 			<ul style="list-style-type: none"> • Goldfields Touring Route • Great Dividing Trail

¹² Goldfields Regional Tourism Development Plan 2004 - 2007

9 BRANDING

AGREED POSITIONING STATEMENT FOR THE GOLDFIELDS REGION

The Goldfields region is Australia's premier gold heritage region offering spectacular historic towns, buildings and gold history. Easily accessible from Melbourne, the region entices the visitor with its grand streetscapes, architecture, gardens, art galleries, festivals and world class attractions.

KEY ATTRIBUTES

Intrastate

- Gold Heritage and History – Sovereign Hill, historic towns and villages (Ballarat, Bendigo and Castlemaine) and Chinese heritage
- Arts and Culture - Australia's finest regional galleries, museums, theatres, arts and crafts studios and antiques
- Festival and Events – Begonia Festival, Bendigo Easter Festival and Castlemaine State Festival
- Gardens and Parks - Botanic Gardens and private historic gardens
- Streetscapes and Architecture - grand buildings (Bendigo and Ballarat) and intact streetscapes (Maldon and Clunes)
- Food and Wine - Award winning local food and wines, authentic pubs and hotels, fine dining and café culture
- Family Holidays

Interstate

- Gold Heritage and History – Sovereign Hill, historic towns and villages (Ballarat, Bendigo and Castlemaine) and Chinese heritage
- Arts and Culture – Australia's finest regional galleries (Ballarat, Bendigo and Castlemaine)
- Streetscapes and Architecture – grand buildings (Bendigo and Ballarat) and intact streetscapes (Maldon and Clunes)
- Food and Wine – Award winning local food and wines, authentic pubs and hotels, fine dining and café culture
- Festival and Events – Begonia Festival

International

- Gold and Heritage – Sovereign Hill and historic towns (Ballarat, Bendigo and Castlemaine)
- Arts and Culture – Australia's finest regional galleries (Ballarat, Bendigo and Castlemaine)
- Streetscapes and Architecture – grand buildings and intact streetscapes

KEY BENEFITS

- Enrichment
- Discovery
- Real
- Connection



10 GOLDFIELDS – ONE YEAR ACTION PLAN 2005 - 2006

MARKETING					
Continue to highlight history and heritage as a point of difference for the region.					
ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Continue the development of Goldfields Suite of brochures: <ul style="list-style-type: none"> • Ballarat OVG • Bendigo OVG • Pyrenees OVG • Jigsaw • Castlemaine / Maldon OVG 	Intrastate Interstate International	\$60,000 \$55,000 \$20,000 \$110,000	05 05 05 06 05	CC, LTA	Visitors to Goldfields VTIS calls Website hits Industry contribution Sales target met Brochures produced and launched Distribution Strategy developed and delivered
Develop a media plan consistent with ATDP requirements and strategy to promote regional product strengths	Adelaide Reg NSW Canberra Melbourne Reg. Vic	\$0	July 05	CC, LTA, Optimedia	Media Plan developed Media buy efficiency
Implement branding and tactical campaigns as per media plan	Adelaide Reg NSW Canberra Melbourne Reg. Vic	\$260,000	August / Sep Dec / Jan March / April	CC, LTA, Optimedia	Increased operator participation in campaigns Visitors to Goldfields VTIS calls / Website hits Packages sold Operator enquiries

ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Evaluate, update and implement Distribution Plan	Intrastate Interstate International	\$20,000	Oct 05	PM, CC	Plan completed and implemented Increased distribution efficiency Increased distribution monitoring
Secure weather program for one week promotional campaign	Intrastate Interstate	\$30,000	September	CC, LTA	Website hits VTIS calls Visitors to Goldfields
Evaluate, update and secure online opportunities i.e to drive traffic to visitgoldfields.com	Intrastate Interstate International		Ongoing	CC, LTA	Website hits Packages sold
Support and conduct relevant research <ul style="list-style-type: none"> • “Brand Essence” workshop • Campaign evaluation • RAPS 	Intrastate Interstate	\$20,000	Ongoing Jan 05 July 06 August 05	CC, TV	Operator participation Increased awareness in key products / brand awareness (RAPS)
Commission research on “VFR” segmentation	Intrastate Interstate	\$5,000	Oct 05	CC, TV	Research delivered Workshops delivered to industry
Underpin Goldfields advertising activities with targeted pr opportunities: <ul style="list-style-type: none"> • Employment PR Consultant • Media Famils • Communications Plan 	Intrastate Interstate	\$30,000 \$5,000	Ongoing	CC, Tyrrell, LTA	PR Plan delivered Ink earned Number of famils
Participate in the Great Aussie Holidays Campaign	Intrastate Interstate		Ongoing	TV, CC	Packages sold Brand awareness Operator participation Program delivered

ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Continue to grow image bank	Intrastate Interstate International	\$5,000	Jan 06	CC, PM, LTA	Images available for use that reflect product strengths and appeal to market segments
Continue to provide opportunities for cooperative destination marketing: <ul style="list-style-type: none"> • Ballarat • Bendigo • Castlemaine / Maldon • Pyrenees 	Intrastate Interstate	\$46,000	Ongoing	CC, LTA	Destination / Operator participation
Provide marketing opportunities for neighbouring destinations where there is a consistent product fit: <ul style="list-style-type: none"> • Rushworth • Daylesford • Macedon Ranges • Grampians 	Intrastate Interstate International		Ongoing	PM, CC	Destination / operator participation
Review collateral for the whole of the Goldfields region	Intrastate Interstate International		Oct 05	PM, CC, LTA	Collateral audit undertaken Committee feedback on recommendation

INDUSTRY DEVELOPMENT

Raise awareness of value of tourism and engagement and participation of businesses and consumers.

ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Develop and Conduct Tourism Week incorporating: <ul style="list-style-type: none"> • Training / Workshops • Launch Goldfields Cultural Guide • Launch Marketing Program Prospectus • Communicate significance of Tourism • Tourism Victoria Goldfields Team Famil • Industry Dinner • Careers Forum • Goldfields Passport • Bush walks / Bike rides • Food and wine event 	Local Gov reps Community Industry Leaders Tourism Operators TV Staff Tourism Staff / Vols.	\$10,000	Sep 05	CC, TV, LTA	Destination / operator participation Local Government briefing held Media ink earned Feedback

Maintain a high standard of visitor services and foster improvements at supporting locations.

ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Produce and distribute a monthly online newsletter	Operators	\$3,000	Monthly	PM, CC	Number of operators on database Feedback
Produce a Goldfields Tourism “Starting in Tourism” Kit	Operators Local Gov	\$3,000	Sep 05	PM, CC, TV	Kit produced, launched and distributed Feedback
Conduct region-wide visitor satisfaction audits to benchmark performance <ul style="list-style-type: none"> • Customer Care Audit 	Operators	\$5,000	Jan 06	CC, TV	Audit conducted Results circulated
Support / conduct a series of industry workshops <ul style="list-style-type: none"> • International readiness • Awards • Staying in Tourism • Succeeding in Tourism 	Operators	\$10,000	Ongoing	PM, CC, TV	Operator participation Feedback
Continue to build and add value to the Goldfields Corporate Website	Operators	\$2,000	Ongoing	PM, CC, TV	Web hits Feedback

PRODUCT DEVELOPMENT

Facilitate development of arts, cultural heritage related product to support the re-energising of the Goldfields image.

ACTION	MARKET	BUDGET 05/06	TIMING	RESPONSIBILITY	EVALUATION
Develop an international strategy for the Goldfields region	International	\$5,000	Oct 05	CC, TV	Strategy developed and implemented
Produce a Heritage Touring Book	Intrastate Interstate International	\$60,000	March 06	CC	Book produced, launched and distributed Numbers sold / distributed
Continue support for trails and national listings: <ul style="list-style-type: none"> • National Listing • Great Dividing Trail • Vine to Vintage • Great Grape Touring Route 	Intrastate Interstate International	\$30,000	Ongoing	Trail Committees, CC	Visitors to Goldfields VTIS calls Website hits Increased alignment of activity across the Goldfields
Actively support cultural heritage product in the region: <ul style="list-style-type: none"> • Victorian Cultural Guide • Goldfields Cultural Guide 	Intrastate Interstate	\$2,000 \$6,000	Aug 05 Sep 05	CTIG CC	Operator participation Wrap around produced and launched
Strengthen the touring market through effective alliances: <ul style="list-style-type: none"> • Capital and Country • Great Southern Touring Route 	Intrastate Interstate International		Ongoing	Route Committees, CC	Visitors to Goldfields Yield Awareness

EVENTS

Maximise the tourism benefits from existing and new events

Provide event marketing support	Intrastate Interstate	\$10,000	Ongoing	CC, Event Committees	Visitors to Goldfields Web Hits Yield
Support Commonwealth Games Marketing Activities <ul style="list-style-type: none"> • Visitor Guide • Regional Feature 	Intrastate Interstate International	\$10,000	March 06	TV, DM, CC, LTA	Visitors to Goldfields Web Hits Yield
Undertake an events audit and prepare an events strategy to better maximise existing events	Intrastate Interstate International		Feb 06	PM, CC, LTA	Audit conducted Strategy prepared

APPENDIX I

Goldfields Campaign Committee membership (as at August 2005):

Rod Thomson (Chair)	Managing Director	Bendigo Pottery
Melinda Anderson (Vice-Chair)	Marketing Director	Sovereign Hill
Rachel Lee (Marketing Chair)	Marketing and Development Manager	City of Greater Bendigo Tourism
Kathryn Mackenzie (Communications Chair)	Executive Manager Tourism	City of Greater Bendigo
David Bannear	Heritage Archaeologist	Heritage Victoria Parks Victoria
Peter Forbes	Tourism Officer	Ballarat Tourism
Jeanette Horsley	Tourism and Economic Development Manager	Pyrenees Shire Council
Sheri McKerrow	Tourism Services Manager	Mount Alexander Shire
George Sossi	Manager City Attractions and Tourism	City of Ballarat
Fiona Symmons (Observer)	Regional Marketing Manager	Tourism Victoria

The Committee is supported by:

Project Administrator:
Publicity & Promotions
Accounting

Alison Richardson
Tyrrell Publicity & Promotions
Philip J Eddy & Partners

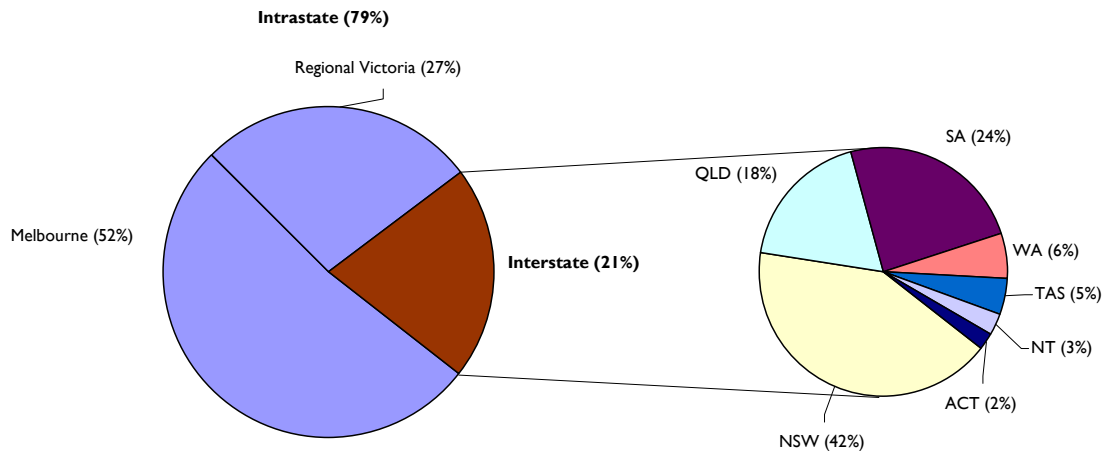
Tourism Victoria
Goldfields Regional Team

Freya Campbell
Robert Brickley
Kerry McClure
Richard Ponsford
Toby Russo
Natalia Standfield
Jane Ross
Angela Drayton

APPENDIX 2

Profile of Domestic Overnight Visitors to Goldfields

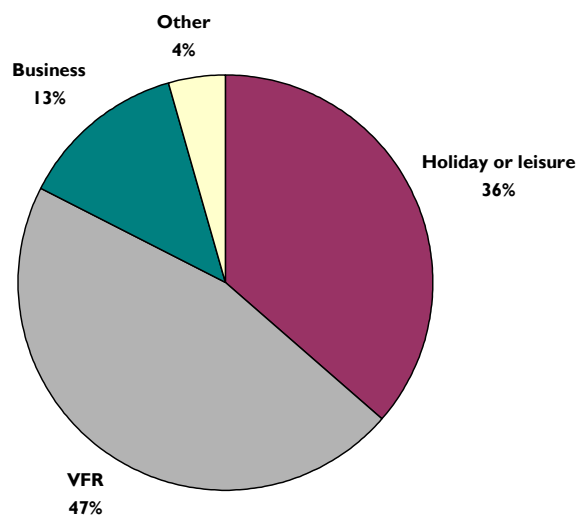
Domestic Visitation by Origin



Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

- Intrastate visitors are the key market for The Goldfields, accounting for 79% of domestic overnight visitors to the region. Interstate visitors, accounting for 21% of total visitors, are primarily driven by the markets of New South Wales (42% of interstate visitors) and South Australia (24% of interstate visitors).

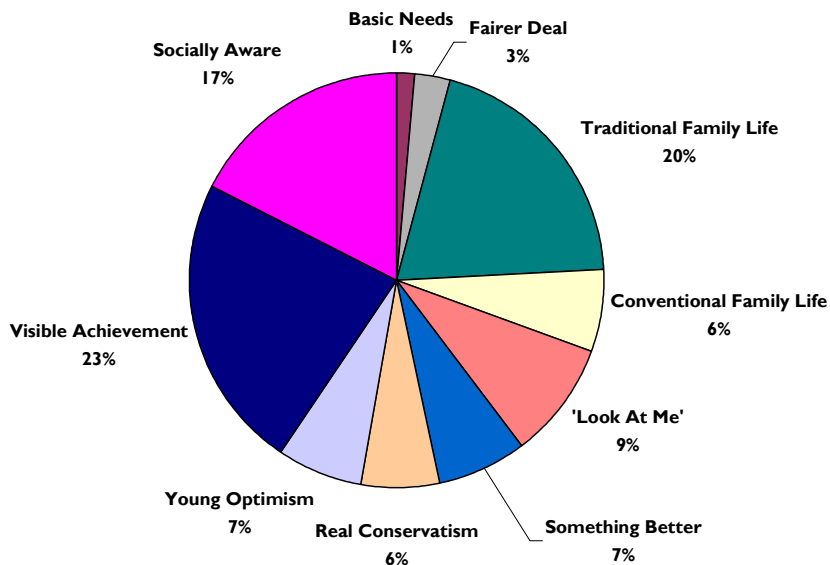
Domestic Visitation by Purpose



Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

- 47% of visitors to the region were visiting friends and relatives, 36% were holiday visitors and 13% were on a business trip.

Roy Morgan Values Segment Profile of Visitors to The Goldfields (last trip)



Base: Last trip travellers to Goldfields

Source: Holiday Tracking Survey (HTS), Roy Morgan Research, 3 years ended December 2004

- In terms of visitation, the Goldfields region is most popular with the Visible Achievement (23%), Traditional Family Life (20%), and Socially Aware (17%) Values Segments.

Profiling of VFR Travellers to The Goldfields

Based on the need to profile the Visiting Friends & Relatives (VFR) market(s) for The Goldfields, a detailed analysis of various research sources commissioned by Tourism Victoria was undertaken. This analysis aims to provide a detailed and objective overview of the VFR market, in order to evaluate both current and future market potential.

Total Market

In the year ending December 2004, 6.5 million visitors to Victoria travelled to visit friends & relatives (VFR). Of these, 66% (4.3 million) visited regional Victoria and 10% (677,000) visited the Goldfields region in particular. In the same period, 19.8 million visitor nights were spent in Victoria by VFR visitors. Of these, 59% (11.7 million) were spent in regional Victoria and 9% (1.7 million) were spent in The Goldfields.

VFR Market	Victoria	Regional Victoria	Goldfields
Visitors (000s)	6,456	4,251	677
Nights (000s)	19,803	11,736	1,701

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

Market Profile of VFR Visitors to the Goldfields

Origin

Origin	VFR	Total
Melbourne	48%	52%
Regional Vic	33%	27%
Total Interstate	19%	21%
NSW	6%	9%
QLD	5%	4%
SA	3%	5%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

The majority of domestic VFR visitors to The Goldfields come from Melbourne (48%) and regional Victoria (33%). When compared to total visitors to the region, VFR visitors were more likely to come from regional Victoria (33% cf 27%).

Age

Age Group	VFR	Total
15 - 24 years	23%	19%
25 - 44 years	36%	34%
45 - 64 years	30%	34%
65+ years	10%	12%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

The majority of domestic VFR visitors to The Goldfields region belong to the 25-44 years (36%) and the 45-64 years (30%) age groups. When compared to total visitors to the region, VFR visitors were more likely to be aged between 15-24 years (23% cf 19%) and 25-44 (36% cf 34%).

Lifecycle

Lifecycle	VFR	Total
Young single	17%	13%
Midlife single	7%	6%
Young/midlife couple, no kids	13%	16%
Parent with children 0-14	27%	24%
Parent with children aged 15+	8%	11%
Older working	11%	12%
Older retired	18%	18%

Source: National Visitor Survey, Tourism Research Australia, Year ending December 2004

Domestic VFR visitors to The Goldfields tended to be from the Parents with children aged 0-14 (27%), Older retired (18%), and Young single (17%) lifecycle segments. When compared to total domestic visitors to the region, VFR visitors were more likely to be from the Young single (17% cf 13%) and Parent with children aged 0-14 (27% cf 24%) lifecycle segments.

Length of Trip

Length of Visit	VFR	Total
1 - 3 nights	88%	86%
4 - 7 nights	10%	12%
8+ nights	3%	2%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

88% percent of domestic VFR visitors to The Goldfields visited on a short trip of 1-3 nights, while a further 10% stayed 4-7 nights, and 3% stayed for 8+ nights. When compared to total domestic visitors to the region, VFR visitors were more likely to stay for 1-3 nights (88% cf 86%).

Travel Party

Travel Party	VFR	Total
Travelling alone	23%	19%
Adult couple	23%	30%
Family group - parents and children	27%	21%
Friends or relatives	25%	24%
Other	1%	5%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

The majority of domestic VFR visitors to The Goldfields travelled as part of a family group (27%) or with friends or relatives (25%). Compared to total domestic visitors to the region, VFR visitors were more likely to travel alone (23% cf 19%) or in a family group with parents and children (27% cf 21%).

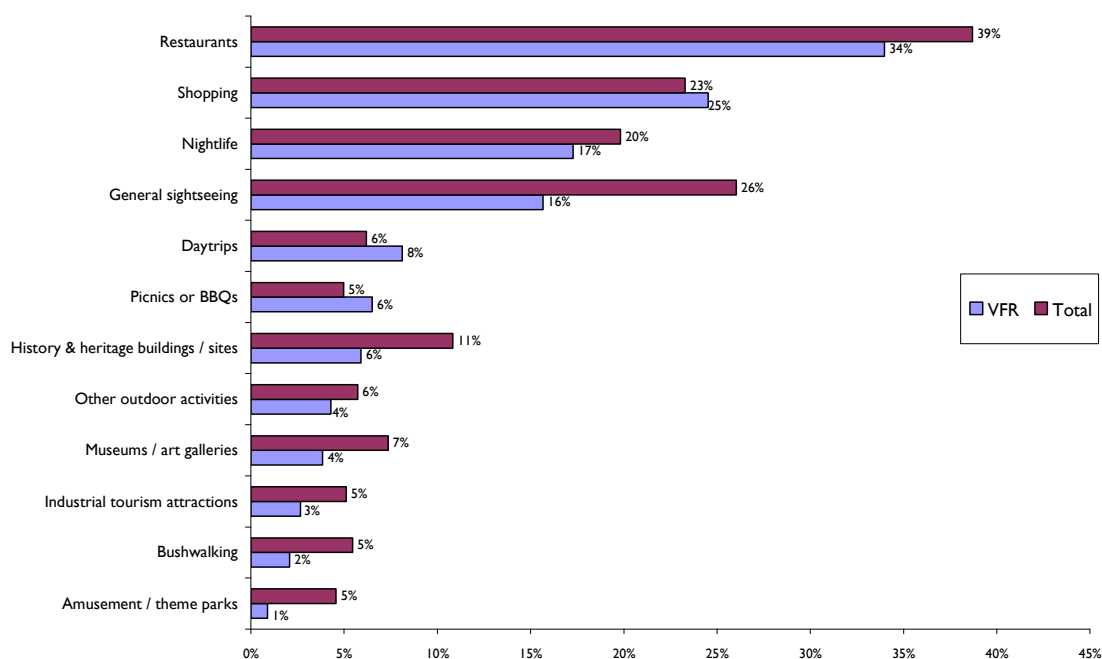
Accommodation Types Used

Accommodation	VFR	Total
Friends or relatives property	89%	48%
Hotel, resort, motel or motor Inn	7%	25%
Rented house, apartment, flat or unit	1%	3%
Caravan park or commercial camping ground	3%	18%
Other	0%	6%

Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

Not surprisingly, the majority of nights in The Goldfields by domestic VFR visitors were spent with friends and relatives (89%). An additional 7% of domestic nights among VFR visitors were spent at a hotel, resort, motel or motor inn, 3% were spent at a caravan park or commercial camping ground and a further 1% was spent at a rented house, apartment, flat or unit.

Activities



Source: National Visitor Survey, Tourism Research Australia, year ending December 2004

The four activities most frequently mentioned activities undertaken by domestic VFR visitors to The Goldfields were eating out at restaurants (34%), shopping (25%), nightlife (17%) and general sightseeing (16%). Compared to total domestic visitors to the region, VFR visitors were more likely to go shopping for pleasure (25% cf 23%), undertake daytrips (8% cf 6%) and have picnics / BBQ's (6% cf 5%).

Consumer Awareness and Perceptions of The Goldfields Region

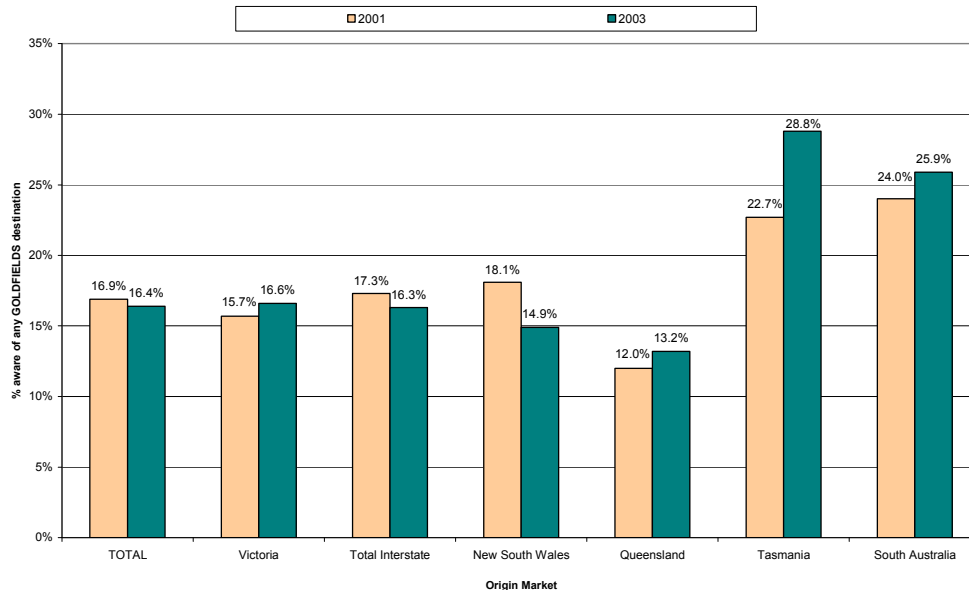
The following analysis is based on Roy Morgan Research's Regional Awareness & Perceptions Study for 2001 and 2003. This study was conducted with the following objectives:

- Test the awareness of holiday destinations in Victoria (both prompted & unprompted);
- Test the awareness of Victoria's tourism product names;
- Establish brand attributes associated with each Victorian region; and
- Map brand strengths across Victoria.

Since the 2003 study, Victoria's Tourism Campaign Regions have changed. Consequently, the following RAPS analysis detailing destination awareness and associations relate to the former campaign region boundaries for The Goldfields region.

Analysis based on Holiday Tracking Survey (HTS) results, including Destination Preference and Intention, refer to current campaign region boundaries.

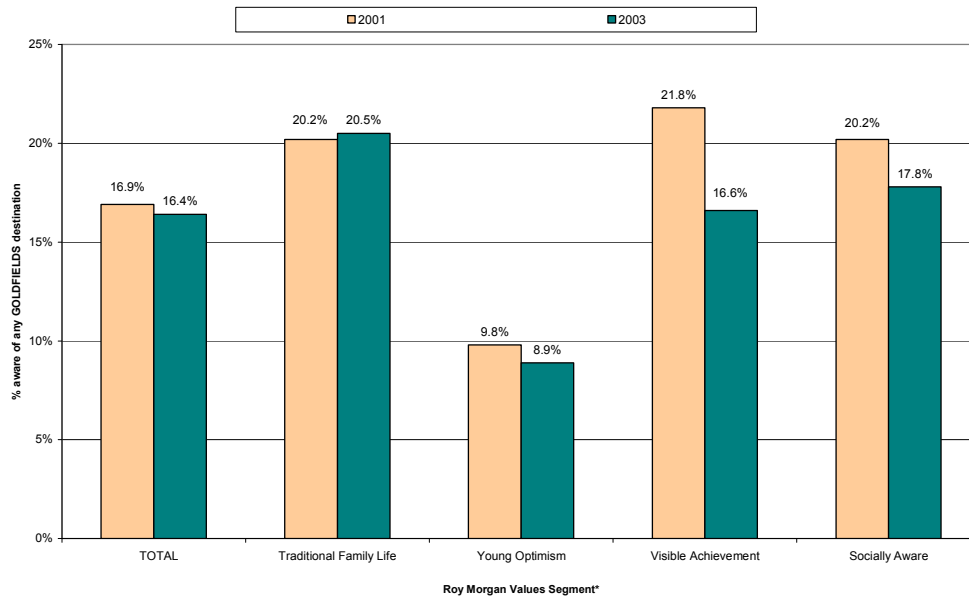
Destination Awareness by Origin Market



Source: RAPS, Roy Morgan Research, 2001 & 2003

Awareness of Goldfields destinations was highest among Tasmanian (28.8%) and South Australian respondents (25.9%), with both states recording increases over 2001 results. In contrast, NSW residents had markedly lower levels of awareness in 2003 (14.9%), with awareness levels decreasing in comparison to 2001.

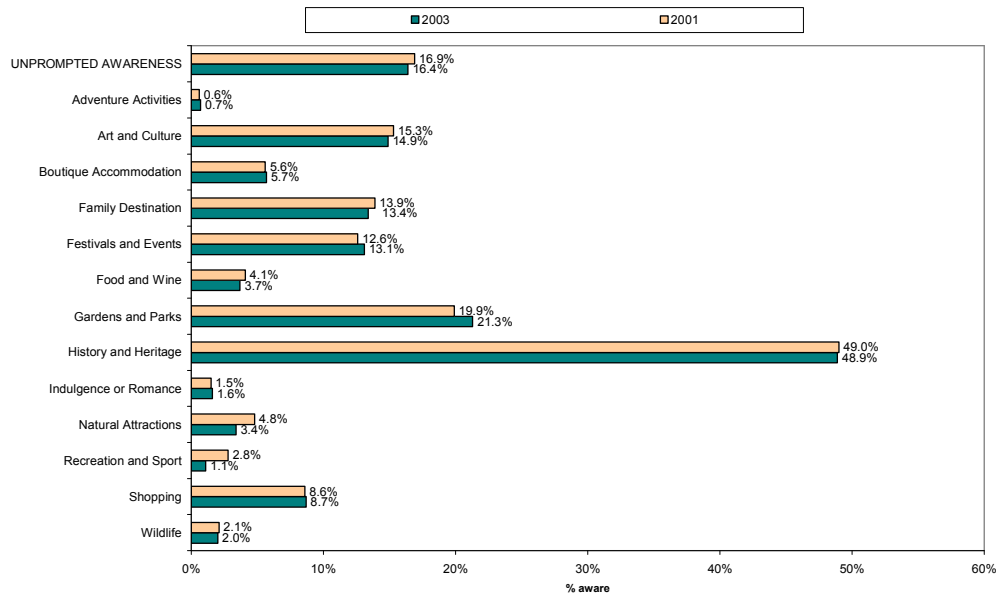
Destination Awareness by Values Segments



Source: RAPS, Roy Morgan Research, 2001 & 2003

Unprompted awareness of The Goldfields region was highest among the Traditional Family Life segment (20.5%). In comparison to 2001, unprompted awareness of The Goldfields remained relatively stable among the YO and TFL markets, but decreased markedly among the VA and SA segments.

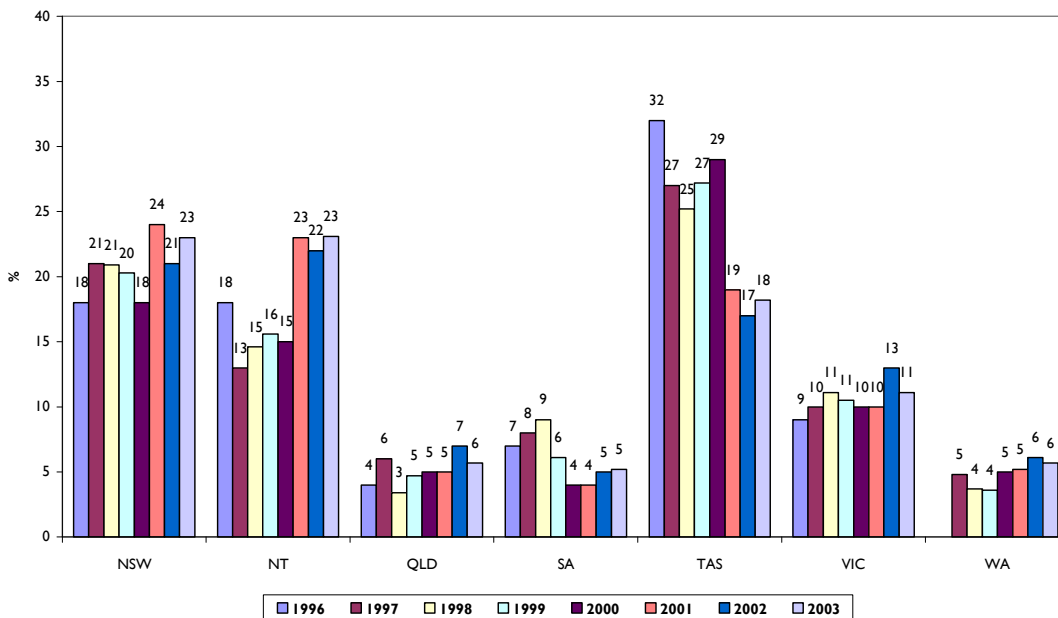
Destination Associations



Source: RAPS, Roy Morgan Research, 2001 & 2003

At the national level, Goldfields destinations were most frequently mentioned in association with history and heritage, gardens and parks, art and culture, family destination and festivals and events.

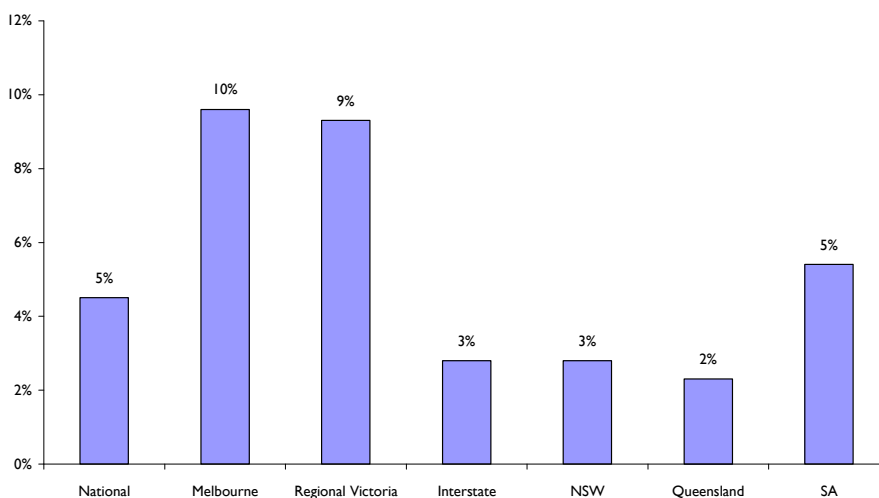
History and Heritage



Source: Brand Health Survey, Roy Morgan Research, 1996-2003

Despite the strong position of the Goldfields region relative to Victorian competitors, it is important to note that other interstate destinations offer substantial competition for this market. Tourism Victoria’s Brand Health survey indicates that Victoria is ranked fourth behind NSW, the Northern Territory and Tasmania as a State offering the opportunity to discover unique history and heritage.

Destination Preference



Source: Holiday Tracking Survey (HTS), Roy Morgan Research, 3 years ended December 2004

5% of Australians nominated The Goldfields as a destination they would like to visit on an overnight trip. Preference levels were markedly higher among both the Melbourne (10%) and regional Victoria (9%) markets. Only 3% of interstate respondents nominated The Goldfields as a preferred destination, although preference levels were higher among the South Australian market (5%).

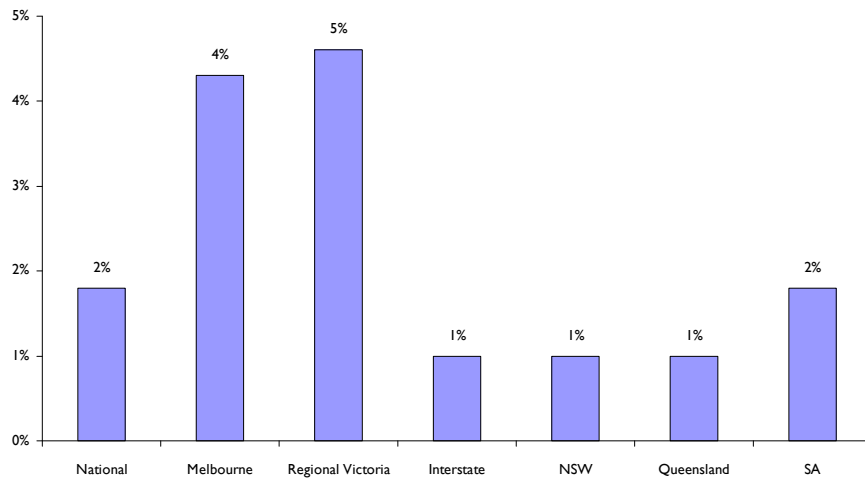
	Total Australia		Melbourne		Regional Victoria		Total Interstate		NSW		Queensland		SA	
	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
Overall Preference	5%	9	10%	10	9%	8	3%	8	3%	8	2%	8	5%	6
Traditional Family Life	5%	6	9%	6	8%	7	4%	6	3%	6	3%	6	6%	7
Young Optimism	3%	11	7%	10	8%	10	1%	10	1%	9	1%	11	3%	7
Visible Achievement	5%	8	11%	9	13%	8	3%	7	4%	7	2%	8	6%	6
Socially Aware	5%	11	10%	10	11%	9	3%	8	3%	8	2%	8	5%	7

Source: Holiday Tracking Survey (HTS), Roy Morgan Research, 3 years ended December 2004

The Goldfields was typically ranked between eighth (regional Victoria, NSW, Queensland) and tenth (Melbourne) in comparison with the other campaign regions of Victoria. The exception to this was SA, where the region was ranked sixth overall, and maintained a ranking of sixth or seventh across Values Segments.

Higher preference levels for The Goldfields were generally observed within the Traditional Family Life and Visible Achievement Values Segments (compared to the overall market level). The Young Optimism segment had lower preference levels for The Goldfields, based on the appeal of coastal destinations such as the Great Ocean Road and Phillip Island.

Destination Intention



Source: Holiday Tracking Survey (HTS), Roy Morgan Research, 3 years ended December 2004

2% of Australians nominated The Goldfields as a destination they intend to visit on an overnight trip. Intention levels were markedly higher among both the Melbourne (4%) and regional Victoria (5%) markets. Only 1% of interstate respondents nominated The Goldfields as an intended destination, although intention levels were higher among the South Australian market (2%).

	Total Australia		Melbourne		Regional Victoria		Total Interstate		NSW		Queensland		SA	
	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank	%	Rank
Overall Preference	2%	8	4%	7	5%	6	1%	6	1%	6	1%	7	2%	6
Traditional Family Life	2%	6	3%	5	4%	5	1%	5	1%	6	1%	5	2%	5
Young Optimism	1%	10	4%	8	4%	8	1%	10	1%	8	0%	10	1%	8
Visible Achievement	2%	7	5%	7	5%	6	1%	4	1%	6	1%	4	3%	5
Socially Aware	2%	7	5%	7	5%	7	1%	6	1%	5	1%	8	2%	6

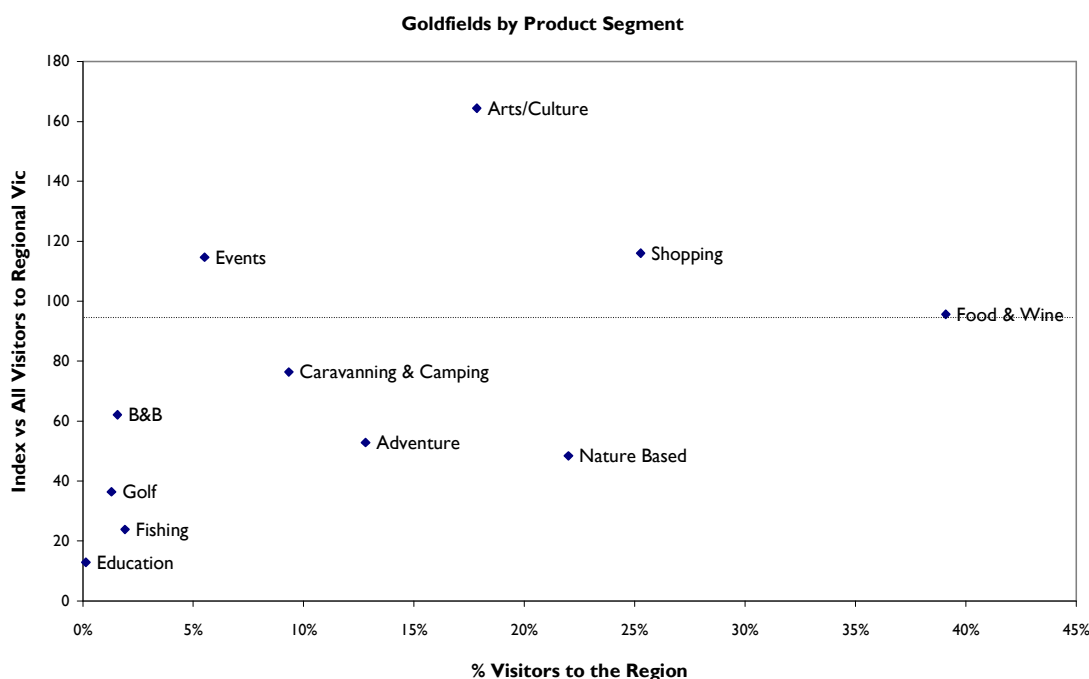
The Goldfields were typically ranked sixth (Regional Victoria, Total Interstate, NSW, SA), seventh (Melbourne, Queensland) or eighth (national) in comparison with other campaign regions of Victoria.

Higher preference levels for The Goldfields were generally observed within the Traditional Family Life and Visible Achievement Values Segments (compared to the

overall market level). Again, the Young Optimism segment exhibited lower levels of intention for The Goldfields relative to other key target markets.

Product Segment Matrix (All visitors)

The chart below outlines the key domestic product segments for The Goldfields region. The segments are illustrated as both a percentage of all visitors to the region (horizontal axis), and in terms of the product segments' propensity* to visit the region when compared to all visitors to regional Victoria (vertical axis). "Food & Wine", and "Shopping" are amongst the largest segments for the region in terms of visitor volume. The "Arts & Culture" and "Events" segments also showed a high propensity to visit the region relative to regional Victoria visitation, but are smaller in terms of volume.



* The segments' propensity to visit the Zone is measured as an index, with 100 illustrating the State average figures. Any segment with an index figure above this benchmark, illustrated by the dotted line, shows a higher than average propensity of visiting the Zone. Please note the following domestic product segment definitions:

- Arts & Culture visitors are defined as those domestic visitors who have participated in the following activities whilst on their trip: attend theatre, concerts or other performing arts, visit museums or art galleries, visit art/craft workshops/studios, attend festivals/fairs or cultural events, visit history/heritage buildings, sites or monuments.
- Food & Wine tourism: Dining out/restaurants, visiting wineries.
- Shopping: Go shopping or go to markets (street/weekend/art craft).
- Events visitors: festivals/fairs or cultural events or attended an organised sporting event on their trip.
- Nature Based visitors are defined as those domestic visitors who have participated in the following activities whilst on their trip: Go to the beach (incl swimming, surfing, diving), Visit national parks / State parks, Visit botanical or other public gardens, Go whale/dolphin watching (in the ocean), Go fishing, Other outdoor activities (e.g. horse riding, rock climbing, white water rafting, bungee jumping, four wheel driving etc), Picnics/BBQs, Bushwalking / rainforest walks, Scuba diving, Snorkelling and Visit the reef.
- Adventure: Bushwalking, fishing, other outdoor activities (e.g. horse riding, rock climbing, white water rafting, bungee jumping, four wheel driving etc).

Please note that these segments do not include international visitors, which may yield different results. This may be particularly relevant for the backpacker and education segments.

Profile of Roy Morgan Values Segments¹¹ - Goldfields Target Markets

TRADITIONAL FAMILY LIFE (approximately 20% of the Australian population)

People from the Traditional Family Life segment are keen holiday tourers, which is reflected in the high use of caravans and campervans. A planned itinerary is a priority, hence the greater use of package tours and bookings through tour operators. They tend to stay in comfortable but good value accommodation, such as standard hotels and motels - they don't want any surprises. Sightseeing is an important aspect of their holiday experience, with a greater tendency to visit museums, art galleries, historical places, and wineries. Visiting friends or relatives is also an important aspect of the TFL's holiday experience.

VISIBLE ACHIEVEMENT (approximately 18% of the Australian population)

Visible Achievement travels frequently and spends big on holiday. As with other purchases, they look for quality and value for money in their holidays. For those with family, the holiday is a chance to spend time together doing activities with the children. They also enjoy holidays that provide the opportunity to play golf and tennis. This segment generally stays in luxury hotels, serviced apartments, and bed and breakfast accommodation.

SOCIALLY AWARE (approximately 14% of the Australian population)

Socially Aware have the highest frequency of travel amongst the Values Segments, and spend big on holidays. Frequency of overseas travel is higher than that among other segments. They travel to destinations such as Tasmania and the Northern Territory that offer the opportunity to explore and have new and different experiences. This segment enjoys planning the holiday and value flexibility, hence they book transport, accommodation and other services directly with the service provider. They enjoy boutique accommodation such as bed and breakfasts and luxury hotels. On holiday, they like to experience cultural activities, such as musical and theatre performances, and enjoy restaurants, arts festivals, wineries galleries and museums, outdoor and nature activities.

YOUNG OPTIMISM (approximately 8% of the Australian population)

Young Optimism travels frequently. They are the segment most likely to have travelled overseas, reflecting their need to seek new experiences and adventure. The tendency to travel overseas is also reflected in their high use of commercial transport, such as airlines, cruise ships, buses and trains. They tend to travel alone or with a small group of friends, and are likely to stay in budget backpacker and hostel accommodation. While on holiday they tend to participate in social activities such as shopping, attend theatre and musical performances, and enjoy nightlife. This segment also attends arts festivals, participate in sports (such as skiing, bike riding, and adventure activities) and prefer holidays in cities.

¹¹ Roy Morgan Values Segments, developed in conjunction with Colin Benjamin of The Horizons Network.

Roy Morgan Values Segments - Propensity for Food and Wine

The Values Segments¹² are groups or ‘segments’ of the Australian population according to similar preference, needs or motivations. The Values Segments are based on psychographic data that provides information on the deeper drivers of choice by examining attitudes as well as demographics such as age, income etc.

The table below lists the four Values Segments identified as target markets for Victoria’s tourism industry and their propensity to visit food and wine attractions and partake in food and wine activities.

Values Segment	Characteristics	Propensity to undertake food & wine activities whilst on holiday in Victoria	Propensity for food, wine and travel activity participation in last 3 months
3.1.1.1 Socially Aware 14% population 19% visitors to Victoria 26% food & wine participants on last trip	<ul style="list-style-type: none"> • Social issues oriented • 35-49 years • Politically/community active • Wealth managers 	<ul style="list-style-type: none"> • Eat out at restaurants, enjoy international food and drink wine • Visit wineries/vineyards • Visit wineries <i>and</i> eat out at restaurants 	<ul style="list-style-type: none"> • Eat a meal at a café • Go to a licensed or BYO restaurant • Take a daytrip in a car • Have a weekend away
3.1.1.2 Visible Achievement 18% population 21% visitors to Victoria 26% food & wine participants on last trip	<ul style="list-style-type: none"> • Success and career driven • 35-49 years • Recognition and status seekers • Good family living • Wealth creators 	<ul style="list-style-type: none"> • Eat out at restaurants, enjoy international food and drink wine • Visit wineries/vineyards • Visit wineries <i>and</i> eat out at restaurants 	<ul style="list-style-type: none"> • Eat a meal at a café • Go to a licensed or BYO restaurant • Take a daytrip in a car • Have a weekend away
Young Optimism 8% population 10% visitors to Victoria 10% food & wine participants on last trip	<ul style="list-style-type: none"> • Young and progressive • 18-25 years • Experimental lifestyles • Seek new and different things 	<ul style="list-style-type: none"> • Eat out at restaurants, enjoy international food and drink wine 	<ul style="list-style-type: none"> • Eat a meal at a café • Go to a licensed or BYO restaurant • Have a weekend away
Traditional Family Life 20% population 18% visitors to Victoria 17% food & wine participants on last trip	<ul style="list-style-type: none"> • Retired middle age Australia • 50+ years • Family-focused lives • Passive income earners 	<ul style="list-style-type: none"> • Visit wineries/vineyards 	<ul style="list-style-type: none"> • Take a daytrip in a car

Source: Holiday Tracking Survey (HTS), Roy Morgan Research, 3 years ended December 2003

¹² Roy Morgan Values Segments, developed in conjunction with Colin Benjamin of The Horizons Network.

APPENDIX 3

DISTRIBUTION PLAN

Distribution Point	Allocation	Rationale
Jigsaw Advertisers (distributed by Administrator)	40 brochures per request	To fulfill enquiries when prospective visitors are not using the regional VIC's
Regional Accredited VIC's	As required (Decision pending re shelf display)	To fulfill telephone enquiries & specific requests.
Intrastate Accredited VIC's	See list attached	Allocation limits based on location, visitation and accreditation level. Storage is an issue for some centres.
Interstate VIC's List to be finalized SA: Adelaide, Mt Gambier, Murray Bridge, Penola, Coonawarra, Naracoorte, Bordertown. NSW/ACT: Canberra, Bega, Merimbula, Wagga Wagga, Narrandera, Griffith, Deniliquin, (Albury in Vic). Tas: Launceston, Hobart	As required (Decision pending on exclusions)	Points and allocation limits based on travel routes into the region and interstate marketing Campaigns.
Tourism Victoria	As requested	Peak marketing body for state, brochures needed to underpin interstate / international activity
visitgoldfields.com	As requested by visitor online	Function to be set up. (TV has approved), fulfillment function to be finalised. Suggest Administration Officer
RACV List of outlets to be sourced	As requested, maximum 2 boxes per request	Important travel information providers for the self drive market
RAA	Send to central store, have requested 5000 (1000 sent)	Important travel information providers for this key interstate self drive market
NRMA	Decision pending	Suggest stock outlets in marketing target areas
Melbourne Airport	As requested	Important gateway for interstate and international visitors
Hire Car Companies Melbourne Airport & CBD	As requested, maximum 2 boxes per request	Melbourne Airport is an important gateway for interstate and international visitors. Hire Car Companies are an important link in the self drive market.
Melbourne CBD Hotels etc	Decision pending	Case by base.
Interstate Airports – Adelaide, Sydney, Hobart & Launceston	Decision pending	Important distribution points for interstate visitors
Travel & Trade Shows	Operators have requested brochures to support activity	Case by case. Suggest use motivational (16,000 remaining) for operators and if activities programmed in the future

