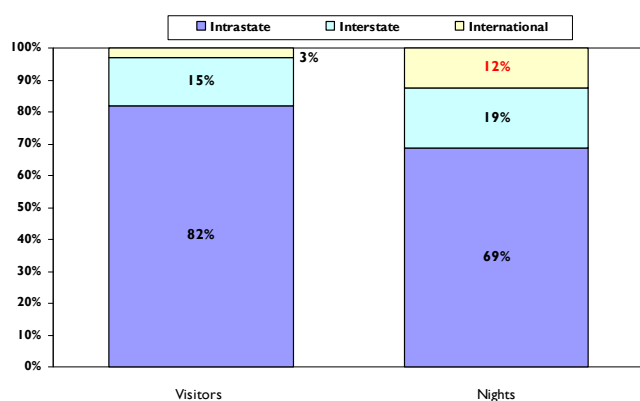


This fact sheet provides a summary of the latest tourism data for the Goldfields campaign region. Information includes: domestic and international visitor numbers, visitor expenditure and domestic visitor profiles such as origin, purpose of visit, visitor activities and travel parties.

DOMESTIC & INTERNATIONAL VISITATION TO THE GOLDFIELDS

- Eighty two percent of overnight visitors to the Goldfields were sourced from the intrastate market, followed by 15% from interstate and 3% from the international market.



- Sixty-nine percent of visitor nights to the Goldfields region were sourced from the intrastate market, followed by 19% from interstate and 12% from the international market.

Year ending December	1999	2007	2008	AAG* 99-08	% change 07-08
Domestic					
Overnight Visitors (000s)	1,262	1,310	1,132	-1.2%	-13.6%
Visitor Nights (000s)	2,634	2,809	2,661	+0.1%	-5.3%
Daytrip Visitors (000s)	3,948	2,881	3,153	-2.5%	+9.4%
International					
Overnight Visitors (000s)	35.6	36.5	33.2	-0.8%	-8.9%

* Average Annual Growth

Domestic Overnight Visitation

- The Goldfields region received 1.1 million domestic overnight visitors for the year ending December 2008. This was a decline of 13.6% from 2007 to 2008. The region has an 11% market share of all domestic visitors to regional Victoria.
- The average annual change since 1999 was a decline of 1.2% for domestic visitation to the region compared to a decrease of 0.8% for regional Victoria generally.

Domestic Visitor Nights

- For the year ending December 2008 the region received 2.7 million domestic visitor nights, a decrease of 5.3% from 2007 to 2008. The average length of stay was 2.4 nights in 2008, up from 2.1 nights in 2007.
- The average annual growth since 1999 was 0.1% for domestic visitor nights to the region compared to a decrease of 0.7% for regional Victoria generally.

Domestic Daytrip Visitation

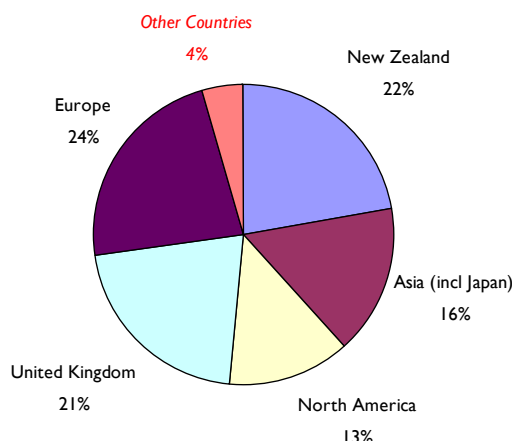
- There were 3.1 million domestic daytrip visitors to the Goldfields region in the year ending December 2008. This was an increase of 9.4% from 2007 to 2008. The region had a 12% market share of all domestic daytrips to regional Victoria.

International Visitation

- The Goldfields region received approximately 33,200 international overnight visitors for the year ending December 2008, a decrease of 8.9% from 2007 to 2008. The region has an 11% market share of all international overnight visitors to regional Victoria.
- The average annual change since 1999 was a decline of 0.8% for international visitors to the region compared to an increase of 2.6% for regional Victoria generally.

PROFILE OF INTERNATIONAL VISITORS TO THE GOLDFIELDS

Origin of international visitors to the Goldfields*



- The largest source markets for visitors to the Goldfields for the year ending December 2008 were Europe and the United Kingdom, accounting for 24% and 21% respectively, and New Zealand with 22% of international overnight visitors to the region.

Age Group (% of international visitors to the Goldfields)

- International visitors to the Goldfields were most likely to be aged between 45-64 years (42%).

Age Group	Goldfields	Regional Vic
15 - 24 years	19%	19%
25 - 44 years	22%	34%
45 - 64 years	42%	35%
65+ years	17%	12%

Purpose of Visit (% of international visitors to the Goldfields)

- Forty-six percent of international visitors to the Goldfields were holiday visitors and 35% were visiting friends and relatives.

Purpose of Visit	Goldfields	Regional Vic
Holiday or leisure	46%	54%
Visiting friends and relatives	35%	29%
Other	19%	18%

Length of Visit (% of international visitors to the Goldfields)

- Fifty-six percent of international visitors to Goldfields were on a short visit of 1-3 nights. A further 24% stayed for 4-7 nights.

Length of Visit	Goldfields	Regional Vic
1-3 nights	56%	55%
4-7 nights	24%	21%
8-14 nights	7%	10%
15+ nights	14%	14%

Travel Party (% of international visitors to the Goldfields)

- Forty-nine percent of international visitors to the Goldfields were travelling on their own. A further 32% travelled as part of an adult couple.

Travel Party	Goldfields	Regional Vic
Travelling alone	49%	49%
Adult couple	32%	32%
Other	19%	19%

Top 15 Activities (% of international visitors to the Goldfields)^

- Compared to all international visitors to regional Victoria, overnight visitors to the Goldfields were more likely to dine out (68% cf 58%), go shopping (36% cf 26%), visit historic buildings and sites (30% cf 9%), museums or art galleries (19% cf 7%), and amusements / theme parks (12% cf 2%).

Activity	Goldfields	Regional Vic
Eat out	68%	58%
Shopping for pleasure	36%	26%
Sightseeing/looking around	33%	30%
Visit historic buildings / sites	30%	9%
Pubs / clubs / discos etc	24%	22%
Visit museums or art galleries	19%	7%
Visit national parks / state parks	12%	26%
Visit amusements / theme parks	12%	2%
Bushwalking / rainforest walks	10%	16%
Visit botanical or other public gardens	10%	6%

* Based on 2 years of data: January 2007 – December 2008.

^ Based on 3 years of data: January 2006 – December 2008.

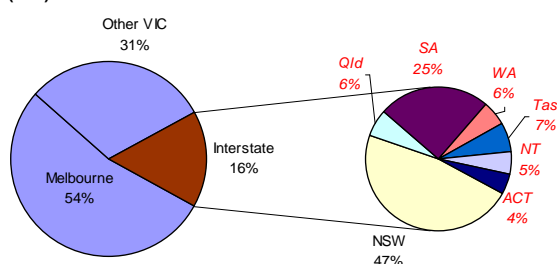
PROFILE OF DOMESTIC VISITORS TO THE GOLDFIELDS

Destination preference

- Three percent of Australians and 8% of Victorians (aged 14 years +) indicated that they would like to visit the Goldfields region in the next two years.

Origin of domestic visitors to the Goldfields

Intrastate (84%)



- Intrastate visitors are the key market for the Goldfields region, accounting for 84% of total domestic overnight visitors. Interstate visitors, accounting for 16% of total domestic overnight visitors, are primarily driven by the New South Wales market which comprises 47% of all interstate visitors to the region.

Age Group (% of domestic visitors to the Goldfields)

- Domestic overnight visitors to the Goldfields were most likely to be aged between 45-64 years (37%) or 25-44 years (35%).

Age Group	Goldfields	Regional Vic
15 - 24 years	12%	16%
25 - 44 years	35%	36%
45 - 64 years	37%	34%
65+ years	16%	14%

Lifecycle (% of domestic visitors to the Goldfields)

- Domestic overnight visitors to the Goldfields region tended to be in the parent (28%) and older non-working (25%) lifecycles.

Lifecycle	Goldfields	Regional Vic
Single, No Kids	18%	19%
Couple, No Kids	12%	12%
Parent	28%	35%
Older Working	16%	15%
Older Non-Working	25%	19%

Roy Morgan Values Segments¹ (% of domestic visitors to the Goldfields)

- Domestic overnight visitors to the Goldfields were more likely to come from the Visible Achievement (22%), Traditional Family Life (22%), and Socially Aware (19%) Values Segments.

Values Segments	Goldfields	Regional Vic
Basic Needs	1%	1%
Fairer Deal	2%	2%
Traditional Family Life	22%	20%
Conventional Family Life	12%	10%
'Look At Me'	11%	10%
Something Better	5%	4%
Real Conservatism	4%	5%
Young Optimism	2%	7%
Visible Achievement	22%	23%
Socially Aware	19%	19%

Purpose of Visit (% of domestic visitors to the Goldfields)

- Forty-seven percent of domestic overnight visitors to the Goldfields were visiting friends and relatives and 38% were holiday visitors.

Purpose of Visit	Goldfields	Regional Vic
Holiday or leisure	38%	57%
Visiting friends and relatives	47%	32%
Business	12%	9%
Other	2%	3%

Length of Visit (% of domestic visitors to the Goldfields)

- Eighty-five percent of domestic overnight visitors to the Goldfields were on a short visit of 1-3 nights. A further 13% stayed 4-7 nights.

Length of Visit	Goldfields	Regional Vic
1-3 nights	85%	77%
4-7 nights	13%	18%
8-14 nights	2%	4%
15+ nights	1%	1%

¹ Developed in conjunction with Colin Benjamin of the Horizons Network

Seasonality of Trip (% of domestic visitors to the Goldfields)

- Domestic overnight visitation to the region peaks during autumn and winter, attracting the highest proportion of visitors (27% and 26% respectively). Visitation during Winter is a higher proportion than visitors to regional Victoria generally (21%) during the season.

Month	Goldfields	Regional Vic
December	5%	7%
January	12%	15%
February	6%	7%
Summer	23%	29%
March	11%	12%
April	9%	8%
May	7%	7%
Autumn	27%	27%
June	10%	8%
July	9%	7%
August	8%	7%
Winter	26%	21%
September	7%	7%
October	8%	7%
November	8%	9%
Spring	23%	23%

Travel party (% of domestic visitors to the Goldfields)

- The majority of visitors to the Goldfields region travelled as an adult couple (32%), alone (27%), in a family group with parents and children (20%) or with friends or relatives (19%). When compared to visitors to regional Victoria, visitors to the Goldfields were more likely to travel alone.

Travel Party	Goldfields	Regional Vic
Travelling alone	27%	17%
Adult couple	32%	31%
Family group - parents and children	20%	24%
Friends or relatives	19%	23%
Business associates	2%	2%
Other	1%	2%

Accommodation (% of domestic visitor nights in the Goldfields)[^]

- Of all domestic visitor nights in the Goldfields region for 2008, 48% were spent with friends or relatives and 25% at a hotel, motel or serviced apartment.

Accommodation	Goldfields	Regional Vic
Friends or relatives property	48%	34%
Hotel, motel or serviced apartment	25%	19%
Caravan park / camping (Commerical or private)	15%	21%
Rented house, apartment, flat or unit	3%	11%
Own property (e.g. holiday house)	3%	8%
Guest house or B&B	3%	2%
Other	3%	4%

Top 15 Activities (% of domestic visitors to the Goldfields)

- Compared to all domestic visitors to regional Victoria, overnight visitors to the Goldfields region were more likely to visit friends or relatives (49% cf 41%), go shopping (26% cf 22%), visit history, heritage buildings, sites or monuments (9% cf 4%) and visit museums or art galleries (11% cf 5%).

Activity	Goldfields	Regional Vic
Visit friends and relatives	49%	41%
Eat out at restaurants	49%	49%
Go shopping (pleasure)	26%	22%
General sight seeing	25%	28%
Pubs clubs discos etc	19%	23%
Visit museums or art galleries	11%	5%
Visit history, heritage buildings sites or monuments	9%	4%
Bushwalking or rainforest walks	6%	12%
Going to markets (street, weekend or art craft)	6%	7%
Go on a daytrip to another place	5%	6%
Attend an organised sporting event	5%	3%
Visit botanical or other public gardens	5%	3%
Play other sports	4%	5%
Picnics or BBQs	4%	5%
Visit national parks or State parks	4%	10%

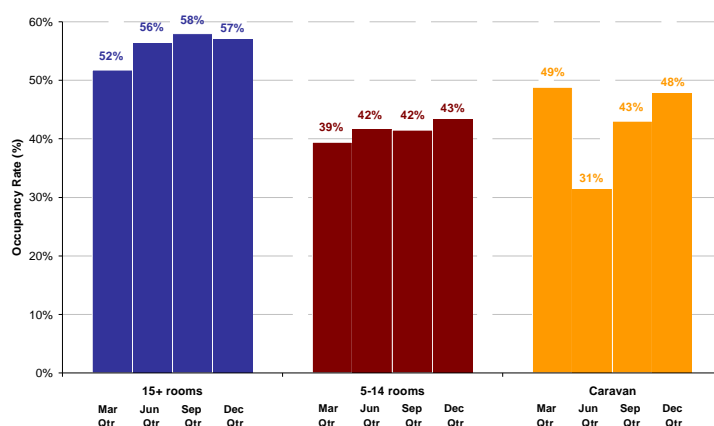
[^] Based on 3 years of data: January 2006 – December 2008.

Tourist Accommodation - supply and demand in Goldfields

- Based on the ABS Survey of Tourism Accommodation:
- There were 63 hotels/motels/serviced apartments with 15 or more rooms in the region as at December 2008. Total takings for 2008 from accommodation for these establishments was \$39.4 million, and the average annual room occupancy was 55.7%.
- In the 5 to 14 room category, 35 hotels/motels/serviced apartments achieved takings of \$4.3 million and a room occupancy rate of 41.3%.
- 30 caravan parks offered 3,999 sites/vans/cabins in total and achieved a site occupancy rate of 38.5% and takings of \$12.1 million in accommodation for the year.

	At December 2008		Year Ending December 2008		
	Establishments	Rooms Available	Room Nights Occupied ('000)	Average Occupancy Rate	Takings (\$'000)
Hotels/Motels/Serviced Apartments 15+ rooms	63	1748	357	55.7%	\$39,356
Hotels/Motels/Serviced Apartments 5-14 rooms	35	308	47	41.3%	\$4,276
Caravan Parks with 40+ powered sites	30	3999	562.8	38.5%	\$12,102

- Peak occupancies varied across the three accommodation types. Hotels/motels of 15 or more rooms peaked during the September quarter while hotels/motels of 5 to 14 rooms peaked during the December quarter. The peak period for Caravan parks in 2008 occurred in the March quarter.



The Goldfields region also offers a number of Bed and Breakfast properties, cottages and farmstays in the region which are not included in the scope of the ABS Survey of Tourist Accommodation results.

For more information on tourist accommodation in Victoria please refer to:

<http://www.abs.gov.au/ausstats/abs@nsf/mf/8635.0>

For more information and statistics on tourism in Victoria please refer to: <http://www.tourism.vic.gov.au/facts-and-figures/>

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 1999-2008, Tourism Research Australia
- *Domestic and International Tourism Expenditure in Australia's regions 2008*, Tourism Research Australia
- *Holiday Tracking Survey*, year ending December 2008, Roy Morgan Research
- *Survey of Tourist Accommodation*, December 2008, Australian Bureau of Statistics.