Rural and Regional Committee  
Parliament of Victoria  
Parliament House  
East Melbourne VIC 3002

Dear Committee Members,

It is with pleasure that I make this submission on behalf of Victoria’s Great Southern Touring Route as part of the Inquiry into Opportunities for Increasing Exports of Goods and Services from Regional Victoria.

Tourism is considered an export industry because International visitors who travel to Victoria purchase the visitor experience and pay for it with their money from their Country of origin. International tourism along the Great Southern Touring Route is a significant source of export earnings but, unlike commodity exports, the consumption is in situ: the consumer, rather than the product, has to move, so the economic contribution enabled by tourism has implications for other sectors in the economy.

By comparison with other export industries Tourism has several specific advantages. Firstly because the experience is consumed within the destination (Australia) it also is subject to GST (additional revenue to the Government). Secondly Tourism if managed in a responsible manner the experience can be “sold” on a daily basis without diminishing the primary resource. As such tourism can be considered as a renewal export that generates foreign exchange and by definition it can not be shipped off shore like the recent trends in manufacturing in Victoria and elsewhere.

As you will note in the following attached submission the Great Southern Touring Route attracts 754,000 international visitors that spend 2.2 million nights along the Touring Route. This visitation alone delivers in excess of $148 Million in visitor expenditure. Further to this a summary chart details relevant tourism multiplier effects and the total flow on to Tourism employment.

We believe the attached submission demonstrates the often overlooked impact of Tourism as an export industry into Regional Victoria. In addition to considering this submission we would like the opportunity to discuss the points raised at one of the public hearings proposed to be held throughout April 2014.

Great Southern Touring Route Trade Manual 2013-2014  

We thank the Committee for considering our submission and look forward to providing further detail during the public hearing process.

Yours sincerely,

Roger Grant  
Director  
Great Southern Touring Rout
A general overview of the nature and history of Great Southern Touring Route

The Great Southern Touring Route (GSTR) is a not-for-profit, incorporated association established to co-operatively market its member regions and participating tourism products to over 1500 members of the international travel trade, who continue to remain the primary provider of high yield international bookings for Victoria. Renowned as Australia’s first and one of the best touring experiences, the Great Southern Touring Route is a circular touring route linking Melbourne to the internationally acclaimed Great Ocean Road, the natural wonders of the Grampians National Park and the majestic heritage of the Ballarat Goldfields and Spa Country. The organisation comprises representatives of member associations of the City of Ballarat, Geelong Otway Tourism, Shipwreck Coast Marketing, Grampians Tourism, and is independently administered by an Executive Officer.

“*The Great Southern Touring Route is perhaps the best example in Australia of a group of regions working together for the sake of a commercial tourism outcome. The Route puts together some of the best and most diverse tourism experiences in Australia and makes it easier for the consumer to see this wonderful part of our country. The consistency of effort over the last 20 years means that it appears in almost every travel agents, wholesaler and online distribution program I see. It has given small operators a way into the global travel distribution system.*” Andrew McEvoy – Managing Director, Tourism Australia

The GSTR began in 1991 to provide for the trade demand of new experiences and itineraries, a circular journey, leveraging off the strength of the internationally recognised Icon of The 12 Apostles, through the surrounding regions of The Grampians and Ballarat Goldfields was developed. In 1993, the Great Southern Touring Route was officially established as a marketing association, funding through shires and member contributions, along with support from Tourism Victoria. The continued promotion and marketing of GSTR led to product improvements, higher standards of products and services as well as new tourism product developments. Industry participation in GSTR continued to grow and in 1999 the first product manual for the GSTR was produced, consolidating the GSTR’s position and reputation as a bookable product with the international trade. (latest Product Manual attached)

“*Twenty years ago I held the position of Global Sales and Marketing Manager for Flag International Hotels - the largest hotel group in Australia, with accommodation throughout the entire region covered by GSTR. This concept offered an opportunity for regional marketing that was unique to any other regional areas throughout the country. Without doubt GSTR is a model copied by many Australian tourist regions. Victoria has benefited by such a visionary and professional concept that is supported by an ongoing strategy and professional team.*” Denise Scrafton, Business Development Manager, Tourism & Hospitality Support Network

Further innovation by GSTR led it to promote itself as part of the Great Downunder Tour in association with the Great New Zealand Touring Route, increasing its appeal to international consumers. In 2003 the GSTR again continued its market growth by working in partnership with other touring routes, in particular the Melbourne to Adelaide Touring Route, encouraging visitors travelling between these two capital cities to incorporate some or all of the GSTR.

For 20 years The GSTR has built a professional reputation with travel trade, featuring in many major wholesale programs covering Australia, around the world, leading to greater visitation to the
GSTR region by international travellers.
The Great Southern Touring Route is a market leader and innovator and this has been achieved by representing our member products and regions through our core values of Partnership, Respect, Excellence, Passion, and Sustainability.

Objectives and Philosophies and the rationale behind marketing initiatives.
Some key issues for attracting international tourists to the GSTR region was the lack of product knowledge from the international trade to prepare itineraries beyond the one day experience and from the tourism products understanding how to work with the international markets. The typical programs being offered were a one day trip to the 12 Apostles returning to Melbourne to stay overnight, and then departing to do a one day trip to Ballarat and Sovereign Hill the next day. This meant that the visitor was spending the majority of time travelling and very little time experiencing the region. The GSTR created opportunities for the international trade to include 3-4 day itineraries that would allow tourists more time to explore each region, slow down and enjoy the experience each region offered.

Objectives:
• Fill market demand for extended touring product and itineraries
• Grow international visitation to each campaign region
• Grow international visitor length of stay to each campaign region
• Grow international visitor expenditure in each campaign region
• Increase the number of tourism products sold through international distribution systems
• Increase awareness and create demand for GSTR products amongst international trade
• Attract new and upgraded tourism products and infrastructure

Philosophies:
Partnership – work in collaboration to grow the industry
Respect – honour the community values of the regions that we represent
Excellence – encourage leadership through sharing industry knowledge
Passion – love what we do!
Sustainability – support the environmental and economic viability of our regions

The initial opportunity for the product which is The Great Southern Touring Route was born from demand by international trade partners wanting a product that went beyond the tried and true day trip experience. International trade partners wanted to extend the experience for their customers; they wanted something new to offer them.

The idea of extended touring itineraries to create greater regional dispersal and visitor expenditure assisted; return visitors to Victoria who were more comfortable exploring regional areas and undertaking self-drive holidays rather than group tours, and long haul markets who were spending a longer time in Australia and were interested in exploring at their own pace. The Great Southern Touring Route provided the answer to these consumer trends.

“I have been selling travel and tour packages to Australia in the United States for 25 years now, and I have been working with GSTR since inception as the drives of Australia have been so important to our business. Americans love to drive themselves on their trips, the location of the drives makes the routes special and unique, and each client has a different perception, desire and need, so with the many options that GSTR have, there is something there for everyone.” Ian Swain, President, Swain Tours, Philadelphia, USA

The GSTR created new opportunities for products to promote their business and service, opened
up new markets for the regions, and provided greater value for money for the regions marketing bodies by pooling their resources for international trade activities.

“Flag International Hotels partnered up with GSTR at the start. It proved to be a very successful partnership with the regional hotels growing their international and domestic business.” Denise Scrafton, (former Global Sales and Marketing Manager for Flag International Hotels)

Use of online portals and applications for pre-planning of holidays has become the preferred tools and are more widely available to consumers. The Sustainable Tourism Cooperative Research Centre (STCRC) in their Case Study of the Great Southern Touring Route in 2008, quotes “The internet is the main source of travel planning information”. It is important for GSTR to have a professional presence in this online space where trade and consumers are accessing information about travel destinations to help them choose their holiday destination and plan their itinerary.

In the past 12 months, the GSTR strategy has been to implement new marketing tools in the online and mobile spaces to target those consumers searching and planning their holiday destinations and activities. Marketing tools the GSTR has developed include:

- Re-developing the GSTR website
- iPhone and iPad applications
- Video vignettes and YouTube Channel

How marketing initiatives contribute to and grow tourism within the Region, State and Nationally.

- **Locally** GSTR shows leadership by providing support, low cost entry to international marketing and training for the industry with the ultimate goal of increasing visitor numbers and spend in the GSTR regions
- **Statewide** GSTR creates a compelling reason to travel to Victoria, explore the region, stay longer and spend more - this has helped to increase Victoria’s market share and presence in travel packages around the world
- **Nationally** GSTR supports the industry and adds to the diversity of Australia’s tourism offering to encourage repeat visitation, greater regional dispersal, expenditure, and length of stay.

The key to GSTR’s success has been collaboration. The marketing of the Great Southern Touring Route is at its core, to deliver tourism growth to the four separate regions of Geelong Otway Tourism, Shipwreck Coast Marketing, Grampians Tourism and the City of Ballarat. The board members are representative of the four regions and volunteer their time, work collaboratively and share information to develop and implement the Marketing Action Plan for GSTR. By working together this has ultimately created an increase in international visitation to each region.

Getting ‘buy in’ from the industry in regional areas can be a challenge and one of the key areas of success for GSTR and subsequent growth can be attributed to GSTR’s ability to nurture the involvement and participation of the local industry.

At inception, there were only a handful of products participating in the GSTR program, today there are more than 60 tourism products. Showcasing the diversity and abundance of tourism experiences found along the Great Southern Touring Route.

We have Memorandum of Understanding’s with Melbourne to Adelaide Touring Route and Sydney-Melbourne Touring, allowing the Great Southern Touring Route to expand and draw visitors coming to Melbourne from interstate.

The three parties produce joint collateral, including touring maps, and undertake joint marketing
activities which provide fantastic return on investment due to the shared costs. The promotion of more regions and products provides seamless itinerary design across state borders and further increases the appeal of GSTR to our target audience.

“Sydney-Melbourne Touring has been absolutely delighted with our partnership with the Great Southern Touring Route. The joint map that we produced was a major hit at ATE (Australian Tourism Exchange) with many of our key wholesalers in the UK and Europe. It is most refreshing that our marketing organisations put politics and parochialism aside and focus on our customer and client needs. We at Sydney Melbourne Touring look forward to many more joint marketing activities with GSTR.” Paul Cooper, Marketing & Business Development Manager, Sydney Melbourne Touring

GSTR has helped attract new tourism products and developments to the regions, such as Oscars Waterfront Boutique Hotel in Port Fairy, launched in 2000, and the Otway Fly developments including the Tree Top Walk (the world’s longest and highest) opened in 2003 and their Zip Line Tour which launched in 2010, all of which became members of GSTR as soon as their product was operational.

“GSTR is our key international marketing link, and has been since our launch in 2000. The success of Oscars in the international market, is due, in no uncertain terms to the work of GSTR, allowing us to build on the working relationships with our ITO’s and wholesalers throughout the World” Richard Douglas, Owner, Oscars Waterfront Boutique Hotel

As it did in promoting itself as part of the Great Downunder Tour in association with the Great New Zealand Touring Route, the GSTR continues to be a market leader and innovator, by establishing and presenting the idea of a Great Touring Routes of The World campaign, to the United Nations World Tourism Organisation (UNWTO) in Madrid in September 2010. This concept again promotes and grows the GSTR on a worldwide scale, linking touring routes across the globe.

Since being formed, the Great Southern Touring Route has helped deliver increased visitation and expenditure to the regions from international markets.

“Without question, GSTR’s development as a Victorian touring option has been instrumental in growing international visitation to the three regions and is a major reason that the three destinations lead the rest of Victoria’s regions in relation to international profile and visitation.” Tom Smith, Regional Tourism Advisor, Tourism Victoria

The additional visitation and visitor nights created by the GSTR has also assisted in Victoria’s increased market share over other states in Australia. Direct comparative figures are not available but as an indicator of this growth the figures from the Australian Bureau of Statistics for 1990/1991 shows the regions of the GSTR accounted for 28.17% of guest arrivals to regional Victoria, in recent data based on the International Visitor Survey IVS for the period to Dec 2010 further refined by ‘Data Insights’* shows that the total International Visitation to the GSTR accounted for 72% of all international visitors to regional Victoria.

The GSTR performance in the period (Dec 2009 to 2010) shows continued success with recorded 3.8% growth* for international arrivals compared to 1.4% for regional Victoria. The figures end March 2011 show average growth across the regions of GSTR of 6.7%*.

“The GSTR is a core tourism offering for Victoria in key international tourism markets, it encapsulates some of the finest tourism experiences on offer in the state and is part of the overall compelling offering that has seen Victoria capture a growth in international market share of 5.4% over the last decade.” Melanie de Souza, General Manager International
Target markets and we have identified them.

The purpose of GSTR is to promote our regions internationally. Our key target markets are Groups and Free Independent Travellers (FIT’s) across a range of International Markets. Our main focus is to attract them by marketing through our trade partners – International Wholesalers, and Inbound Tour Operators.

Primary Western Markets - UK, Europe (Germany), North America, New Zealand

For the Great Southern Touring Route, the Western markets of Europe, UK, North America provide travellers whose typical profile is high-yield, offer greater length of stay and whose dispersal to regional areas is also higher, whilst New Zealand offers high repeat visitation which is ideal for a regional touring route. We target large well established wholesale companies as well as niche wholesalers who have a strong focus on self-drive programs.

**Germany - Market Profile: Groups and FIT’s**

This market is one of Australia’s top markets for length of stay and regional dispersal. So it is ideal for the GSTR as the German traveller has the time and interest in exploring regions. The German economic outlook remains strong and forward forecasts for this market are for continued growth. This is a high detail orientated market with consumers conducting extensive research on the destination prior to travel. Most of the research by the consumer is conducted online however most bookings still coming through traditional distribution partners.

*Market Interests and GSTR Product Strengths:*

Icons, Indigenous Culture, Nature, Food and Wine, Self Drive Itinerary options

**United Kingdom - Market Profile: FIT’s**

This is one of the largest markets for arrivals into Australia; Victoria has a high market share. The main market segments are Holiday and Visiting Friends and Relatives (VFR) and this market has a good length of stay and regional dispersal as well as a comparatively high proportion of arrivals being repeat visitors. This makes the diversity of product on the GSTR attractive for this market. A high proportion of first time visitors research their holiday online with traditional distribution partners remaining one of the main sources for bookings.

*Market Interests and GSTR Product Strengths:*

Icons, Beaches, Nature, Food and Wine, Self Drive Itinerary options

**Secondary European Markets:**

**Switzerland, Benelux, Scandinavia, France, Italy, Austria** - Market Profile: FIT’s


**North America**
**Canada - Market Profile: Groups and FIT's**
Canadians are highly seasoned travellers with a good length of stay and regional dispersal. The Canadian travel distribution system remains relatively traditional, with a few key operators handling the majority of outbound travel to Australia. Whilst Canadian consumers are increasingly using online channels for planning and booking travel, retail agencies still play a key role in developing customised itineraries.


**USA - Market Profile: Groups, FIT's**
The USA is one of Australia’s top markets for arrivals, and Victoria maintains good market share. This market’s average length of stay is less compared to some other Western Markets due to US employees receiving only two weeks of annual leave. The holiday segment makes up the majority of arrivals and the GSTR offers opportunities to maximise travel times by offering the circular touring route. Although the economic outlook in the USA remains uncertain and the strength of the AUD has reduced buying power, the forecasts for growth of this market remain good due to increased aviation capacity and lower airfares. Customised holiday experiences continue to be very important for Americans who often research elements of their Australian holiday online, then work with a travel agent for planning and bookings. Whilst the travel trade in the USA is large and complex there are several key wholesalers that specialise in Australia.


**New Zealand - Market Profile: Special Interest (Events) Groups, FIT's**
New Zealand is a key target market, the consistently high volume of visitation to Victoria and relative proximity make marketing the diversity of the product on the GSTR to the New Zealand trade important to provide appeal for return visitors.


**Eastern Markets - Asia**
The Asian region offers great opportunities for growth with some of our mature markets continuing to show good growth figures, China fast becoming one of Australia’s major markets and continued growth out of emerging markets like India. This region offers good opportunities for groups and FIT business and helps to continue a good market mix for GSTR and production for our members.

**China - Market Profile: Leisure (Approved Destination Status - ADS) Groups, Business Groups, FIT's.**
China is still largely a group market due to language, food, and visa requirements. Leisure travellers from China can only travel on an ADS visa which historically due to restrictions has only allowed for group travel. Recent changes to the ADS visa regulations will create new opportunities
for FIT travel.

The high volume market of China is now the number one source market for visitor expenditure and Tourism Victoria forecasts to be Victoria’s number one source market for International visitors by 2012.

*Market Interests and GSTR Product Strengths: Icons, Australian/Chinese History, Gold Rush*

**India** - Market Profile: Leisure Groups, Family Groups, FIT’s.

India is still largely an emerging market which typically requires Indian food for most or all meals. Therefore this market still tends to travel in the comfort and safety of a group.

*Market Interests and GSTR Product Strengths: Icons, Australian History, Nature*

**Singapore & Malaysia** - Market Profile: Study Tour Groups, Family Groups, FIT’s.

The targeting of mature Asian markets of Singapore and, Malaysia is very important as these markets offer high return visitation and are exploring regional areas and self-drive holidays in much higher numbers as they seek new Australian experiences.

*Market Interests and GSTR Product Strengths: Icons, Nature, Food and Wine, Self Drive Itinerary options*

**Eastern Markets - Asia (continued)**

**Japan** - Market Profile: Study Tour Groups, FIT’s.

Whilst the size of the Japanese market has diminished in recent years this market still offers regular group business with study tours and repeat visitation with regional disbursement for FIT’s. We have an in-market representative in Japan who provides fantastic value for money in targeting the key wholesalers and other opportunities for GSTR.

*Market Interests and GSTR Product Strengths: Icons, Nature, Food and Wine, Self Drive Itinerary options*

**Experience Seekers**

Within these markets we target consumers whom Tourism Australia identifies as Experience Seekers. This target market is highly predisposed to Australia’s offer and is more likely to stay longer, spend more and disperse to regional areas. They are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers constitute around 30 to 50 per cent of all potential long haul outbound travellers from our key source markets, and can be found among all age groups, income levels and geographic locations.

*GSTR Product Strengths: Icons, Nature, Adventure, Food and Wine, Immersion in Local Culture, Self Drive Itinerary options*

**Inbound Tour Operators (ITO’s)**

We work closely with ITO’s within Australia as these organisations provide the link to many of the international wholesalers in our target markets, they are responsible for liaising with the wholesalers in regard to itinerary planning and are the key local contact for the international
travellers once they are in Australia. We target those ITO’s who handle clients in our key target markets and particularly those whose clients target Experience Seekers.

“The GSTR is important for us as our clients (German speaking market) are independent travellers and a strong self-drive market. They are interested in that Region and like to discover new places and attractions. They are not too much interested in mainstream products but in experiences which offer them the real Australian experience. GSTR offers them this mix, getting to know great landscapes, experience different places, with the help of a well-organised Touring Route with products which suit them.” Anneli Buehrle - Product Manager, Terra Nova Coach Tours (ITO), North Sydney NSW

Consumers

One of the key findings in a survey undertaken by EC3 Global on the GSTR was the methods used by the travellers surveyed to book their trips. With 79% of those people surveyed saying they made their own arrangements whilst 21% of people booked through a travel agent or a combination of utilising a travel agent and their own arrangements for bookings.

Members

We market ourselves to our existing and potential new members as this is a funding source for our activities and it also provides diversity of experiences in the GSTR product.

How we identify our Markets

Tourism Victoria

Given our target markets are mostly international Great Southern Touring Route has worked very closely and aligned marketing activities with Tourism Victoria.

• International Team – we liaise with the International Marketing Team based in Melbourne and with Tourism Victoria’s Overseas Offices in UK, Europe, North America, New Zealand, North & South Asia and marketing representatives in Japan and India.

• Industry Briefings – Victorian International Exchange (VIE) – and Annual International Market update provided by Tourism Victoria’s International Managers for the industry.

Research

• Market Profile reports – Tourism Victoria publish a Market Profile report for each of the three Campaign Regions that make up the Great Southern Touring Route; Great Ocean Road, Grampians, and Goldfields. These provide information for International and Domestic Markets, and include important statistical data on:
  • Origin of Overnight Visitors   • Overnight Visitation numbers   • Purpose of Visit
  • Length of Stay   • Market segment information   • Make-up of the travelling party
  • What activities were undertaken during the visit

The statistics are tracked against previous year’s results, helping to highlight growth markets and changes to market visitation trends. These regular reports provide GSTR with accurate tracking of visitation from our target markets to assist us to measure our marketing activities.

Tourism Australia

International Team - we liaise with the International Marketing Team based in Sydney and with the Tourism Australia Overseas Offices in UK, Europe, North America, New Zealand, North & South Asia and Japan.

Research - we refer to and utilise the following research available through Tourism Australia:

• Tourism Forecasts   • Global Market Monitor   • International Market Profiles   • Industry
Briefings
• International Visitor Profile • Market Segmentation (Experience Seeker Profiles per Market)

Internal Research

EC3 Global
In 2010 the GSTR committee in partnership with EC3 Global commenced an International Traveller Survey (ITS) to help identify travel patterns of visitors along the GSTR. During the period July – September 2010 the research undertaken was a survey of self-drive visitors at Visitor Information Centres situated along the GSTR, including Lorne, Geelong, Warrnambool, Hamilton, Halls Gap, Ballarat and Dunkeld. Data collected in the ITS included:
• Origins of International Travellers on the GSTR.
• The method through which they planned and booked their trip.
• The direction that they travelled during their time on the GSTR.

Results of this survey have confirmed our international market profile and helped us learn more about those travellers; particularly their booking patterns which have lead us to producing new marketing tools.

Data Insights
The regions contract Data Insights an independant consultancy company to interpret data from IVS and other research to produce relevant reports for the regions. GSTR utilise this data to track and monitor our markets. (latest Data Insights report attached)

Relationships with Distribution Partners
We have close relationship with wholesalers and ITO's in our target markets which assist us to identify new opportunities and trends.

“As a leading travel wholesaler in Denmark established in 1988, we have been working with GSTR since its inception. They provide us with all that we need to know in terms of products and so on, which are provided to us in a very professional and friendly form! The GSTR is an important product for us as it is one the most popular self-drives in the world! GSTR always provides us with neutral and objective information about products, as well as helping us put together new itineraries, which is very important”. Steen Grosen Andersen, Nyhavn Rejser A/S, Denmark

Marketing strategies used the outcome of those strategies.
Responsibility for the GSTR target markets are split individually between the Executive Officer, Gaby Robinson, in-market representatives – Gaby Robinson for Europe and Izumi Nagai for Japan, and the regions which make up the organisation; City of Ballarat, represented by George Sossi and Tim Grandfield, Tourism Greater Geelong and The Bellarine, represented by Roger Grant and Brett Ince, Grampians Tourism, represented by Kylie Schurmann and Will Flamstead, and Great Ocean Road Regional Tourism, represented by Carole Reid. Having defined markets of responsibility means the organisation can effectively target a wider range of markets with a greater focus.

We contract Great Southern Destinations Marketing (GSDM), for a number of projects including website development and maintenance, online marketing developments and member sales activity.

In our marketing strategy for 2010/2011 we made a dedicated move, backed by internal and external research, to develop new marketing tools accessed through new technologies. This included:
• Launched iPhone & iPad applications  • Re-designed and re-launched our website
• Production of video vignettes of our partner’s products
• Launched a new YouTube channel - GSTRAustralia.

We recognised through the EC3 Global survey that a large proportion of travellers were making their own arrangements, whilst other research confirmed use of Apple iPhone and iPad technology is very high and still growing rapidly in Australia and overseas:
Smartphone sales to end users were up 72.1% from 2009. Apple sold 46.6 million units in 2010, 87.2% growth from 2009. Source: Gartner (February 2011).

We also continued our ongoing commitment to working with trade partners and utilising traditional marketing activities and tools, in A Case Study of the Great Southern Touring Route by the STCRC in 2008, 53% of survey respondent’s claimed Maps and 43% claimed Brochures, as sources of travel planning information. So for GSTR it is still important for us to print collateral such as our yearly Trade Product Manual and touring maps. Printing of collateral in various languages has also been very useful particularly in the Asian markets such as Japan and China, where English is less familiar. Our traditional marketing activities to trade partners include:
• Sales calls  • Trade events  • Brochures  • Touring maps
## Target Market: UK & Europe

We target the large well established wholesale companies as well as niche wholesalers and agents who have a strong focus on customised and self-drive programs.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partnership Marketing &amp; Advertising</td>
<td>Wholesale partner opportunities</td>
<td>Partnership with Bridge &amp; Wickers, GSTR/GOR/Melb/Adelaide website developed by B&amp;W</td>
<td>Exposure / Sales generated</td>
<td>Won award from Tourism Australia for Best Campaign, achieved 238 direct bookings for GSTR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Partnership with STA Travel UK and hosted media for Promotion of Falls Festival</td>
<td>Exposure / Sales generated</td>
<td>Media Exposure: Clashmusic.com; The Guardian; Audience Mag; Drowned in Sound; Rolling Stone. STA 85 packages sold.</td>
</tr>
<tr>
<td>Trade Activity</td>
<td>Corroboree UK/ Europe</td>
<td>Training of Aussie Specialist agents in Darwin Post Corroboree event familis for wholesale staff attending</td>
<td>Agents Trained</td>
<td>300 agents trained</td>
</tr>
<tr>
<td></td>
<td>In-Market Representative</td>
<td>Gaby Robinson in-market rep, undertake sales trip through Europe (June 2011), communicate regularly with product managers and agents</td>
<td>Agents Trained, brochure inclusion</td>
<td>Met with 23 product manager (decision makers) in Germany, Switzerland and Belgium; 34 wholesale brochures</td>
</tr>
</tbody>
</table>
# Target Market: North America

We target the large well established wholesale companies that have an Australian program as well as niche wholesalers and agents who have a strong focus on customised and self-drive programs.

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<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Activity</td>
<td>North American Roadshow</td>
<td>Train wholesale staff and Product Managers in Philadelphia, New York, Los Angeles, Montreal (Jan/Feb 2011)</td>
<td>Agents trained, brochure inclusion</td>
<td>228 agents trained and 12 wholesale brochures featuring GSTR</td>
</tr>
<tr>
<td></td>
<td>Corroboree North America</td>
<td>Post Corroboree event famil for wholesale staff attending</td>
<td>Number famil per market</td>
<td>10 agents travelled to GOR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Training of Aussie Specialist agents on Hamilton Island (Sep 2010)</td>
<td>Agents training, exposure</td>
<td>160 agents trained</td>
</tr>
</tbody>
</table>

# Target Market: New Zealand

Due to the smaller market place, we target all wholesale companies in particular those who have a strong focus on customised and self-drive programs.

<table>
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<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partnership Marketing &amp; Advertising</td>
<td>Tourism Victoria partnership activities</td>
<td>GSTR product to be included in Regional Supplement collateral piece</td>
<td>Distribution/ exposure/operator buy in</td>
<td>GSTR featured, 6 GSTR operators involved</td>
</tr>
<tr>
<td></td>
<td>Wholesale brochure inclusion</td>
<td>Target key wholesalers: United Travel, Go Holidays, DTN Touring, House of Travel</td>
<td>Brochure inclusion</td>
<td>GSTR included in all key wholesale brochures</td>
</tr>
<tr>
<td>Trade Activity</td>
<td>Tri-State Walkabout</td>
<td>Train agents on Gold Coast (May 2011)</td>
<td>Agents trained, exposure</td>
<td>150 agents trained</td>
</tr>
<tr>
<td></td>
<td>Post Tri-State Walkabout event famil participants</td>
<td></td>
<td>Number famil per market</td>
<td>12 agents on famil of GSTR</td>
</tr>
<tr>
<td></td>
<td>Melbourne Cup Promotion / Trade Training</td>
<td>Tourism Vic promotional event held annually, key Product Managers attend this event, strengthen trade relationships (Nov 2010)</td>
<td>Exposure generated</td>
<td>Met 10 wholesale agencies</td>
</tr>
</tbody>
</table>
### Target Market: Singapore/Malaysia

We target the large well established wholesale companies as well as niche wholesalers and agents who have a strong focus on FIT and self-drive programs. We also target the NATAS Travel Fairs due to the very large consumer attendance which supports our trade relationships.

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<tbody>
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<td>Partnership Marketing &amp; Advertising</td>
<td>Wholesale brochure inclusion</td>
<td>Target key wholesalers: Giamso Intl, MSL Travel, SA Tours, Chan Bros etc.</td>
<td>Brochure inclusion</td>
<td>13 brochures in Singapore; 12 brochures in Malaysia</td>
</tr>
<tr>
<td>Trade Activity</td>
<td>South East Asia Mission</td>
<td>Train Agents from South East Asia, in Saigon</td>
<td>Agents trained</td>
<td>approx 70 agents</td>
</tr>
<tr>
<td>NATAS (including prize giveaway)</td>
<td>Attend event to promote to consumers pre/post purchasing special travel deals from wholesalers at event, provide prize to giveaway during event</td>
<td>Exposure</td>
<td>Great interest in prize giveaway from consumers, knowledge of GSTR high</td>
<td></td>
</tr>
</tbody>
</table>

### Target Market: Japan

Our focus with Japan is to keep GSTR in front of our wholesale partners by utilising the services of an in-market representative based in Japan, promoting suitable events and targeting student groups.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Activity</td>
<td>Appoint Izumi Nagai as in-market representation</td>
<td>Maintain a presence with the Japanese trade and media, sales calls, promotion of GOR Marathon</td>
<td>Agents trained, exposure</td>
<td>Monthly meetings with Product Managers in Tokyo, Osaka and Nagoya</td>
</tr>
</tbody>
</table>

### Target Market: China & India

Our focus with China and India is to build relationships with the trade and their knowledge of GSTR as a product, primarily targeting key wholesale partners for brochure inclusion.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Activity</td>
<td>Tourism Victoria Roadshow to China, sales calls</td>
<td>Train agents from Beijing, Shanghai, Jiangsu/ Zhejiang, Southern China and Chongqing</td>
<td>Agents trained</td>
<td>62 appointments held with agents</td>
</tr>
<tr>
<td></td>
<td>India Travel Mission (Tourism Australia event)</td>
<td>Train agents from Mumbai, Hyderabad, New Delhi</td>
<td>Agents trained</td>
<td>64 appointments held with agents</td>
</tr>
</tbody>
</table>
### Target Market: Inbound Tour Operators

Our focus with ITO’s is to continue to build relationships and keep them updated on new products and marketing tools they can access, and provide itinerary ideas.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trade Activity</td>
<td>Membership ATEC</td>
<td>Renew membership, EO has joined ATEC Vic/Tas branch committee in Aug 2010</td>
<td>Attendance at key ATEC events</td>
<td>Attended Meeting Place, Symposium, Vic/Tas famil and workshop, &amp; networking events</td>
</tr>
<tr>
<td>Trade Events</td>
<td>ATEC Meeting Place</td>
<td></td>
<td>Appointments held</td>
<td>22 ITO appointments</td>
</tr>
<tr>
<td></td>
<td>ATEC Vic/Tas Famil and Workshop</td>
<td></td>
<td>Appointments held</td>
<td>20 ITO appointments</td>
</tr>
<tr>
<td></td>
<td>ATEC Symposium</td>
<td></td>
<td>Appointments held</td>
<td>25 ITO appointments</td>
</tr>
</tbody>
</table>

### Target Market: Members

We focus on retaining current members and attracting new member products to join the GSTR marketing program.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI's</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintain the level of operator participation</td>
<td>Member e-newsletter</td>
<td>Newsletter sent quarterly</td>
<td>Newsletter distributed, % open rate</td>
<td>open rate 88%</td>
</tr>
<tr>
<td>Undertake sales program</td>
<td></td>
<td>Sales program executed by GSDM</td>
<td># of members retained/new members signed up</td>
<td>97% retention of members, 8 new members</td>
</tr>
<tr>
<td>Annual GSTR Member Workshops</td>
<td>Run informal workshops/lunches for members and prospective members in regions</td>
<td>Min 2 workshops held</td>
<td>Workshops held in Port Campbell (Oct 2010), Geelong (March 2011)</td>
<td></td>
</tr>
</tbody>
</table>
Our focus is to develop new marketing tools and increasing GSTR’s online reach through greater and refreshed presence, as well as to continue to produce traditional marketing tools/collateral.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Develop and maintain online communication for trade</td>
<td>Website Redevelopment (featuring option to translate complete site into foreign languages), e-newsletters for International Trade &amp; ITO’s, PR Agencies and Members, Video Vignettes Development, subsidy for members</td>
<td>Focus on trade’s need to feature more detailed information on GSTR members, including video vignettes of the operators and their offerings, 3-4 trade e-newsletters to be sent per calendar year, grow database from attendance at trade events, GSDM to film member products, video’s put on re-developed website and on GSTR YouTube channel</td>
<td>Number of unique visitors to site/partner links, Number distributed, % open rate, GA tracking and impact on site profile/ranking, requests from trade for access</td>
<td>Launched and went live on 01 April. More than 2500 unique visitors,Sent to 1517 trade partners, avg. open rate 75%, GSTR YouTube channel launched March 2011, 52 videos loaded, received over 3500 views</td>
</tr>
<tr>
<td>Develop and distribute collateral for the International travel trade</td>
<td>Produce Product manual for the Trade, New Product Flyer 2011/2012</td>
<td>2011/2012 completed for attendance at ATE 2011 in April, New GSTR members being highlighted for distribution at ATE, ITO events and roadshows</td>
<td>Number distributed</td>
<td>4000 copies printed, 500 produced, PDF put on website for trade</td>
</tr>
<tr>
<td>Digital trade/consumer tools</td>
<td>Develop iPhone/iPad applications</td>
<td>Engage Lookout Mobile, Melbourne based media company specialising in mobile application development to develop GSTR iPhone and iPad application. GSDM to provide the creative concepts and content.</td>
<td>Number of downloads</td>
<td>Apps went live on 02 June, downloads to 30 June total 485 (189 iphone, 296 ipad)</td>
</tr>
<tr>
<td>National/International TV Exposure</td>
<td>Drive Through Australia TV Program</td>
<td>Sign up for 2 episodes to be filmed in the Pyrenees, Grampians, Shipwreck Coast, Otways and Bellarine Peninsula, showcasing GSTR products. Episodes shown in Australia in Feb 2011, distributed to worldwide broadcasters through to 2014.</td>
<td>Exposure to national and international audience of GSTR product</td>
<td>Episodes shown on Network 7 Australia</td>
</tr>
</tbody>
</table>
### Target Market: General (continued)

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactics</th>
<th>Action</th>
<th>KPI’s</th>
<th>Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Undertake Co-operative marketing to promote touring linkages</strong></td>
<td>Syd-Mel Touring / Mel-Adelaide Touring</td>
<td>Produce a joint map for distribution, highlight touring route from Sydney through to Adelaide via GSTR</td>
<td># maps distributed</td>
<td>30000 distributed</td>
</tr>
<tr>
<td></td>
<td>Melbourne to Adelaide Touring</td>
<td>Reprint touring maps in partnership with Melbourne-Adelaide Touring Route</td>
<td># maps distributed</td>
<td>100,000 distributed</td>
</tr>
<tr>
<td><strong>Market to the international travel trade</strong></td>
<td>Attend ATE to gain inclusion of product in wholesale programs</td>
<td>All four directors and EO to attend ATE in Sydney in April 2011</td>
<td>GSTR representation / #appointments held</td>
<td>117 Western appointments, 72 (full schedule) Eastern appointments</td>
</tr>
<tr>
<td><strong>Great Touring Routes of the World concept</strong></td>
<td>Development of concept</td>
<td>Proforma design suite developed by GSDM for Roger Grant to present to the United Nations World Tourism Organisation in Sep 2010</td>
<td>Concept development stages achieved</td>
<td>Roger presented to UNWTO in Spain in Sep 2010</td>
</tr>
</tbody>
</table>

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**Trade brochure samples**

At Bridge & Wickers we get excellent support from GSTR in the form of product updates and training and marketing contributions. With their support we were able to develop and launch our OZcars’ winning microsite (www.our-australia.co.uk/drives) which has helped us to achieve record sales for us in the regions and beyond.”

Andrew Chapman, Director of Marketing, Bridge & Wickers
How we are funded
The primary source of funding for GSTR since it was incorporated has been from four regional organisations / councils (City of Ballarat, Grampians Tourism, Shipwreck Coast Marketing and Geelong Otway Tourism) and industry membership. This amount of funding committed by the four regional organisations / councils has historically been matched by a similar amount from industry participation in GSTR. Combined these sources of funding have historically provided between 50-70% of total funding of GSTR’s activities.

Representation in markets is mainly done by the board members, being the representatives of the campaign regions, at no additional cost to GSTR.

Since 2007/2008 GSTR has received an annual funding amount from Tourism Victoria, this amount has provided approximately 20-30% of total funding to GSTR over these years.

In the last 12 months GSTR has also been eligible for funding through the Export Marketing Development Grant (EMDG), which reimburses organisations and business’ up to 50% of the eligible export promotion expenses. For the 2010/2011 year we forecast this amount of funding to represent approximately 25% of GSTR’s funding for the year, whilst looking ahead to future years we expect this amount to continue to provide around 12% of total funding. EMDG funding is for a period of 7 years, with the first time application allowed to combine 2 years of expenses, hence the higher amount of funding for 2010/2011 compared to future forecasted funding.

Unique attributes of Great Southern Touring Route

Relationships

• **Trade Partners:** GSTR has built a strong reputation over the two decades it has been working with the trade. The creation of the GSTR was a result of trade requests and by continuing to collaborate on new ideas the support for GSTR is shown through acceptance in wholesale programs around the world. To strengthen our relationships with trade partners we provide quarterly e newsletters (75% open rate), specific trade pages on our website and have in-market representatives for Japan and Europe that conduct sales calls activities.

  “We have been working with GSTR for more than 12 years. The support given to us by GSTR helps us to undertake additional marketing projects and to win more customers. GSTR always offers key contact persons who are open minded, very helpful and are specialized in and have a good understanding of the German market.” Joachim Voss - Product Manager Australia / New Zealand / South Pacific, Meier’s Weltreisen, Frankfurt, Germany

• **Member product suppliers:** strong relationships with our member product suppliers have also played a big part in the success of GSTR. This is strengthened through quarterly member e-newsletters (88% open rate) with updates on our activities, and a series of workshops for member products and potential new member products to network and reflect on GSTR’s activities throughout the year.

• **External:** relationships with other organisations have also created unique partnerships for GSTR. Establishing MOU’s with Melbourne to Adelaide Touring and Sydney to Melbourne Touring, has taken GSTR from a stand-alone touring route with limitations to its immediate
region, into two different states, helping link together to form greater self drive experiences.

The GSTR was the first touring route in Australia to be marketed internationally, an innovation that continues to expand, from the partnership with the Great New Zealand Touring Route to form the Great Downunder Tour, through to the concept of the Great Touring Routes of The World campaign, which was presented to the United Nations World Tourism Organisation in Madrid in 2010.

Technology

GSTR has embraced further use of modern technology in the marketing of its product range. Marketing tools launched in the past year by GSTR:

- **iPhone and iPad applications:** GSTR is one of the first regional touring routes in Australia to have developed these applications for consumer and trade use. The GSTR application of these mobile tools are used by agents and the traveller, as a way of accessing information quickly and easily whilst on the go or at home or office. Only launched at the start of June 2011, the GSTR application had at 30th June 2011 been downloaded 485 times.

Some of the application’s key features include:
- Detailed regional information
- GSTR Product information and contact details
- Dynamic video content
- Detailed mapping
- Itinerary planner
- Image gallery

- **Video vignettes and YouTube:** dedicated YouTube channel GSTRAustralia launched at the end of March 2011 following the production of video vignettes of GSTR member products, 52 product videos are available for viewing as well as our Christmas 2010 message to the trade. The member product videos also feature on their pages on the new website. Since the GSTRAustralia channel was launched on YouTube, we have received over 5000 views in 3 months.

- **New website:** our redesigned website has kept GSTR fresh and accessible to consumers around the world, including language translation of the website into Chinese, Japanese, German, French and Italian. Our re-launched website has been live since April 2011 and has already seen very positive numbers of unique visitors (2500) from our key markets. Additional features such as the video vignettes of the products and trade resources pages to support our partners has helped the GSTR website’s Google ranking increase from three to number one when searching for Great Southern Touring Route.

Ensuring information is reliable and accurate

As we produce online and a number of printed collateral including our Product Manual, Touring Map, New Product Flyer and Foreign Language Maps in Japanese and Chinese, it is important all information we produce is accurate as it is used by the travel trade to sell and promote the GSTR.

GSTR Website

- **Project Manager** – GSDM conducted the relaunch of our new website, they ensure all information is accurate and updated as required.
- **Member products** – provide us with all the information for their product listings. Any new developments or changes to their products are updated by GSDM on the GSTR website within 48 hours of being advised.
- **Google Translate** – is used for the foreign language conversion of our website ensuring an accurate and immediate translation, of our webpages.
Product Manual, Touring Maps, New Product Flyer

- **Member products** – provide us with all the information for their product listings. Each piece of collateral is printed annually, with changes to product information being updated each year. Proofs are sent to the members prior to going to print.

- **GSTR Directors** – are tasked with the responsibility of planning and developing each piece of collateral, with proofs checked by all Directors.

- **Foreign Language collateral** – Accuracy of translation of our touring map into Japanese is undertaken by our Japanese in-market representative who is a Japanese national and who has over 20 years’ experience in tourism marketing. The Chinese translation of our touring map is done and checked by eTranslate.

**Member Product Information**

- **Member Products** - it is a mandatory policy as a member of the GSTR that products advise us of the sale or change of their business so that we can advise Trade partners.

- **GSTR Directors** - are tasked with the responsibility of visiting each potential new member prior to their membership approval to see the product first hand to ensure suitability and to ensure accuracy of information provided.

**Trade Partners**

- **Marketing Activities** - GSTR Directors are responsible for ensuring trade partners in their assigned markets have correct information of GSTR in any brochures, campaign activity or websites.

- **Agent Training** - Regular agent and wholesale training is achieved by sales calls and trade training events in our target markets. This ensures that GSTR product is understood and further promoted accurately in sales to consumers and in marketing collateral such as brochures and websites.

- **Familiarisations** - The GSTR actively seeks to participate in trade and media familiarisation opportunities that arise through Tourism Victoria, Tourism Australia and its own activities. Having trade experience the GSTR product first hand is the best way to ensure the trade understands the product accurately.

**Risk issues identified.**

We have identified risk issues for GSTR which are listed in the matrix below, it should be noted that GSTR is a marketing association with no direct employees, representatives of the regions are covered by GSTR insurance policies during their travels however are not employees of GSTR. The Executive officer and in market reps are self-employed contractors covered by their own workcover and insurance policies.

**Risk Management Matrix**

<table>
<thead>
<tr>
<th>Risk</th>
<th>Level</th>
<th>Business Consequence</th>
<th>Mitigation Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global Economic</td>
<td>Med</td>
<td>Ability to provide business to members through marketing</td>
<td>Market Mix spread to cover a broad range of markets,</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>Risk</th>
<th>Level</th>
<th>Business Consequence</th>
<th>Mitigation Strategy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Member Retention</td>
<td>High</td>
<td>Reduced funding to GSTR affecting budgets and planned marketing activities, reduced product offering to wholesalers lowering appeal of GSTR</td>
<td>Member retention and Marketing strategy</td>
</tr>
<tr>
<td>External Funding Sources</td>
<td>High</td>
<td>Reduced funding to GSTR affecting budgets and planned marketing activities</td>
<td>Funding secured in advance from Regional Tourism Bodies/Councils, and Tourism Victoria</td>
</tr>
<tr>
<td>Financial Accountability</td>
<td>Low</td>
<td>Spending of funding outside of budgeted activity or over budget</td>
<td>GSTR Finance Policy covers Directors responsibilities, c/card and expense authority</td>
</tr>
<tr>
<td>Contracts</td>
<td>Low</td>
<td>Spending more than budgeted for certain marketing activities</td>
<td>GSTR Finance Policy covers requirements for supplier quotes and contracts</td>
</tr>
<tr>
<td>Intellectual Property</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retention of IP from Contractors</td>
<td>Low</td>
<td>Loss/leaking of private information/documents to outside sources/competitors</td>
<td>Secure documents - procedures manuals, reporting</td>
</tr>
<tr>
<td>GSTR Representatives</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Third party damages on Sales Trips</td>
<td>Low</td>
<td>Litigation against GSTR and its Directors</td>
<td>GSTR Public Liability</td>
</tr>
<tr>
<td>Overseas Travel /loss/theft/injury</td>
<td>Low</td>
<td>GSTR to pay for incidents that occur whilst travelling</td>
<td>Travel Insurance</td>
</tr>
<tr>
<td>Injury to contractors within Australia</td>
<td>Low</td>
<td>GSTR responsibility to cover costs of contractors injuries</td>
<td>External Contractors covered by their own workcover insurance policies</td>
</tr>
<tr>
<td>Professional Liability</td>
<td>Low</td>
<td>Litigation against GSTR and its Directors</td>
<td>GSTR Professional Liability</td>
</tr>
<tr>
<td>Directors Liability</td>
<td>Low</td>
<td>Litigation against GSTR and</td>
<td>GSTR Public/Professional</td>
</tr>
<tr>
<td>Risk</td>
<td>Level</td>
<td>Business Consequence</td>
<td>Mitigation Strategy</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-------</td>
<td>--------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Quality Assurance</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Member Product</td>
<td>Med</td>
<td>GSTR image and brand reputation affected</td>
<td>Mandatory business policies required to be a part of GSTR as outlined in prospectus</td>
</tr>
<tr>
<td>IT- Technology</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Data Recovery/Backups</td>
<td>Med</td>
<td>Loss of important information, databases, contracts etc.</td>
<td>All files are backed up daily and these backed up files stored off-site</td>
</tr>
<tr>
<td>Document Storage</td>
<td>Low</td>
<td>Loss of important information, databases, contracts etc.</td>
<td>Electronic copies of all key documents are saved</td>
</tr>
<tr>
<td>Web hosting</td>
<td>Low</td>
<td>Key marketing tool being compromised / ineffective, trade and consumer confidence affected</td>
<td>Security profiles of the website are regularly updated. A backup version of the website is maintained.</td>
</tr>
<tr>
<td>iPhone/iPad apps</td>
<td>Low</td>
<td>Investment in these applications being compromised, brand, reputation and consumer confidence affected</td>
<td>The app is only distributed through the iTunes App Store. This strategy ensure risk is minimised and consumer confidence maximised.</td>
</tr>
<tr>
<td>Risk Level</td>
<td></td>
<td>Business Consequence</td>
<td>Mitigation Strategy</td>
</tr>
<tr>
<td>Trade Distribution</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GSTR Brand Management</td>
<td>Med</td>
<td>Misuse of GSTR Brand by trade partners affecting reputation and industry relationships</td>
<td>GSTR Market Representative to oversee and check all use of GSTR brand by wholesale partners</td>
</tr>
<tr>
<td>Contracts</td>
<td>Low</td>
<td>GSTR committed to partnership activity with wholesale partners</td>
<td>GSTR Market Representative to ensure all wholesale partnership commitments remain within budget and are delivered as per contract</td>
</tr>
<tr>
<td>Brochure inclusions</td>
<td>Low</td>
<td>Wrong information of GSTR product in brochures, affecting reputation and brand, consumer confidence</td>
<td>GSTR Market Representative to oversee and check all use of GSTR product by wholesale partners</td>
</tr>
<tr>
<td>Natural Disaster</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In Jan 2011 the communications plan for natural disasters was implemented when the floods occurred in the Grampians region. GSTR immediately advised our trade partners through an E-news update in which links were provided to Grampians Tourism and Parks Victoria to manage the chain of communication and ensure correct and up to date advice to trade and consumers. In addition GSTR provided alternative driving routes by updating and reprinting our maps for distribution to the trade.

**Sustainability.**

Our values of Partnership, Respect, Excellence, Passion, and Sustainability are key to how we support our members and promote GSTR.

At the very heart of GSTR is the sustainable stewardship of the community, environment and economic viability of the regions and products that we represent.

The longevity of our members businesses and the pristine natural environments that are available for our markets to explore is the foundation of our operations.

We align with the environmental commitment of the regions that we represent. Two of our regions have Earthcheck (formerly Green Globe) credentials:

- In 2005 Geelong Otway Tourism adopted the Green Globe 21 program as a means to work towards a sustainable industry. Geelong Otway Tourism was the first tourism association in Australia to achieve Green Globe 21 benchmarking status.

GSTR endeavours to provide respectful and responsible promotion of our regions. By creating and promoting itineraries that encourage exploration allowing the visitor to experience natural areas this helps to foster an environmental and cultural appreciation and understanding, thus nurturing a positive impact from visitors to the region.

Our strong focus on the natural environment as the core of the experiences on offer competitively positions us in our marketplace and encourages new and repeat visitation. In particular our environmental commitment is shown by:

- Leadership and innovation – creating opportunities for regional dispersal
- Encouraging visitors to slow down and explore
- We request and display our members green credentials in trade manuals
- Our member products include award winning Eco Tourism Experiences
- Our regions encompass pristine environments, National and State Parks which include 3 of Australia’s iconic National Parks (Great Otways, Port Campbell and Grampians) that is over 280,000 hectares of the areas we promote being National Parks
- In April 2011 the Great Ocean Road was added to the National Heritage List which recognises and protects Australia’s most valued natural, Indigenous and historic heritage sites. Places listed in the National Heritage List are protected under the Commonwealth Environment
In making the announcement The Hon Tony Burke MP, Minister for Sustainability, Environment, Water, Population and Communities said “The Great Ocean Road is one of the most powerful, spectacular and distinctive landscapes in Australia and the nation’s most famous coastal drive.”

GSTR leveraged this opportunity by giving local Radio interviews with ABC and 3YB Warrnambool, and local press with the Warrnambool Standard. Information was sent to our international partners by E Newsletters and information provided at ATE. In addition further promotion of this status was achieved through the newsletters and websites of Tourism Australia, and Tourism Victoria.

- The Great Ocean Road is one of Australia’s 12 most iconic landscapes currently part of the National Landscapes program
- The imagery and promotions that we use are motivational to respect and explore natural environments
- Video Vignettes highlighting Eco experiences
- The collateral – this year with a focus on new technologies we have managed to reduce the amount of printed information that we provide to our partners by 20%. This has resulted in a saving on printing and distribution costs of more than $10,000.
- By promoting and featuring Ecotourism experiences of an International Standard GSTR helps to raise the profile of Victoria as an Ecotourism destination.

Some of our Award winning Eco experiences include:

**The Great Ocean Ecolodge**
The Great Ocean Ecolodge is a social enterprise, established and operated by The Cape Otway Centre for Conservation Ecology. All profits are reinvested into wildlife conservation and the Ecolodge itself is entirely solar powered and ecologically responsible, resting gently in the landscape of Cape Otway. The lodge has Advanced Ecotourism Accreditation by Ecotourism Australia and in 2005 Lizzie was named the Prime Minister’s Environmentalist of the Year, the first female and youngest-ever recipient of the award. In 2007 The Australian Geographic Society bestowed the Conservation Award on the couple. Lizzie has also been a member of the National Environmental Education Council and the Otways Landscape Community Council

**The Great Ocean Walk**
The Great Ocean Walk, from Apollo Bay to the iconic 12 Apostles, has attracted hikers from across Australia and around the world, keen to meet the unique challenge of Victoria’s iconic long distance walk.

“There is so much about the Walk you don’t expect to find and with the track hugging the rugged coastline it takes hikers to places rarely experienced,” Peter Burns, Parks Victoria Ranger-in-Charge, Great Ocean Walk.

**Benefits to the local community values and culture**

Our values are representative of the regions that make up the Great Southern Touring Route. By working in Partnership with industry we have been able to leverage and achieve greater results for our members. We represent our communities in our marketing with Respect and honour the values of our regions. Through sharing industry knowledge we work to raise industry standards,
encourage leadership and Excellence. We are Passionate about where we come from and we love what we do. We strive to support the environmental and economic Sustainability of our members and communities.

The purpose of the inception of the Great Southern Touring Route was to create regional dispersal, and offer more opportunities for the growth of the tourism industry in the coverage areas of GSTR and beyond.

“The Shire has been a long standing participant in the Great Southern Touring Route. The Council understands that this collective approach to international destination marketing is the most cost effective means for the exposure of Council’s tourism assets in these key markets.

While the industry continues to maintain volatility across both domestic and international sectors we are aware that without GSTR’s capacity to provide linkage with other key attractions in Victoria – aka Great Ocean Road and Ballarat our regional industry would be less sustainable.” Samantha Magill, Director Marketing and Community, Northern Grampians Shire Council

The communities that make up the regions of the GSTR have similarity and cultural diversity at the same time.

The indigenous history in the area dates back more than 40,000 years and GSTR features three of Victoria’s top Indigenous experiences in Worn Gundidj, Narana Creations and Tourism Award Winning Brambuk Cultural Centre. These Indigenous experiences provide interest for many of our key international markets and helps to foster an understanding of the historic and contemporary indigenous culture of the region.

Just as the opening of the Great Ocean Road in 1932 connected towns that were previously only accessed by sea, GSTR has been about connecting communities through tourism experiences. The contemporary culture and history of the communities and the experiences in the GSTR include indigenous, nature based, adventure, agriculture, gold rush, Chinese history, maritime, surfing, arts, music, food and wine.

By promoting itineraries that encourage exploration, a diverse range of experiences and immersion in local communities we not only provide for our target markets but create opportunities for greater regional disbursement, which allows us to fulfil our commitment to our members and regions by creating economic benefits and business growth.

‘Since Great Southern Touring Route (GSTR) commenced in 1991 we have experienced a significant growth in international tourism. We have no hesitation in attributing the growth in this region to the initial vision of GSTR to create awareness of the beauty of the Great Ocean Road which subsequently converted to visitation which means economic growth for our region. Warrnambool City Council as a financial supporter of GSTR for the total 20 years congratulates GSTR for the professional and effective marketing’. Bill Millard, Director City Growth, Warrnambool City Council

In addition to providing opportunities for tourism growth and therefore growth of regional economies GSTR also contributes in the following ways:

- Promotion on cultural and regional events in our international markets, for example in 2010/2011 we did a special promotion for the Falls Festival (Lorne - Dec/Jan) with STA in the UK and the Great Ocean Road Marathon (May) in particular in the Japanese market
- Provide our international marketing material to groups (Schools, Business and Community) that
are hosting or going to visit international schools, cities, sporting events

• Our directors speak to community groups about the GSTR partnership and demonstrate how we market their region to the world. Groups include Rotary, Probus, and Community Foundations. This helps to foster an understanding of the importance and benefits of tourism to the region.

**Marketing innovations and results achieved.**

From its inception, the GSTR has been an innovator and continues to be so today. During the qualifying period we introduced the following:

**New Technology**

**iPhone & iPad Applications**

With the rapid growth of smart phones and tablet computers GSTR quickly identified the importance of developing applications suitable for such products as the iPhone and iPad.

The early adoption and creation of these applications which were launched at the start of June 2011, to promote member products to our markets that have an ever increasing appetite for “instant information” at their fingertips.

These tools that effectively market GSTR and assist in the pre-planning of itineraries are also extremely helpful for “on tour” assistance with mapping tools and specific tour directions. To our trade partners it reinforces the point that GSTR is, even after 20 years, a modern and developing product capable of producing new and innovative product training tools to help their staff achieve more sales.

“As a Product Planner and Aussie Specialist that promotes Victoria it is important to have the tools to support us, we have been working with GSTR for more than 4yrs, and the key things that they do to assist are the informative product updates, information and up to date highlights & news. Compared to other regions/touring routes the support that we receive is much better than anywhere else. They are very up to date and now with only one touch I can get all the info I need through my iPad (just download GSTR product) which makes it easy for me as a planner & consultant.”

Al Chan - Tour Consultant, Malaysian Harmony Tour & Travel Sdn Bhd

**Website**

Re-launched in April 2011 the GSTR website features new initiatives resulting in more than 2500 unique visitors.

• Language translation tools for Chinese, Japanese, German, French and Italian. Making it easier for trade and consumers to access GSTR information in the comfort of their own language.

• Trade Resources pages that include: GSTR image gallery, market contact details, e-newsletter archives. This provides quick and efficient access for our partners to trade specific information, downloadable images and updates.

**Video Vignettes and YouTube**

Producing the video vignettes of GSTR product members and the creation of the GSTRAustralia YouTube channel at the end of March 2011 has proven remarkably successful in showcasing its products in a new format.

The GSTR is a unique visual experience and the videos are highly effective tools in training trade partners who due to distance may not have the opportunity to experience the product first hand. This allows trade and consumers to view the products when deciding on brochure inclusions, pre-
planning itineraries, making accommodation choices and deciding on activities to undertake on a visit.

The interest in the GSTRAustralia YouTube channel has been well above expectation receiving over 3500 views in its first 3 months, the Google ranking has also markedly improved from three to one.

“It is always important to be “up to speed” and get information about the latest developments in a region which I cannot visit on a regular basis. In addition we get the support to do additional marketing here in Germany for GSTR. It is definitely a very good service, and you, the representatives, are very active and helpful. Looking at touring routes you are definitely the only ones which are that pro-active. So I hope you don’t mind if I just say: I am very very very happy with your support!” Peter Just, Dertour, Germany

New Trade Initiative

Japan In Market Rep

In July 2010 we appointed Izumi Nagai as an in-market representative for Japan. This initiative has provided a value for money opportunity to strengthen our relationships with trade partners in this market.

United Nations World Tourism Organisation

In September 2010 GSTR presented the innovative concept of a ‘Great Touring Routes of The World’ campaign, to the United Nations World Tourism Organisation based in Madrid. This presentation at such a high level within the world tourism body is testament to GSTR’s proven innovative techniques. It has played a major part in GSTR being recognised as a global benchmark in the successful marketing of a touring route and being featured in such prestigious publications like the UNWTO Silk Road Action Plan 2010/2011.
Measuring the impact of Great Southern Touring Route

**Figure:** Summary Chart, 2012-13

- **Domestic interstate tourism consumption:** $260m
- **Domestic intrastate tourism consumption:** $2,000m
- **Inbound tourism consumption:** $148m

**Total tourism consumption at purchasers’ prices (internal consumption):** $2,480m

- **Net taxes on tourism consumption:** $196m
- **Imported goods and services:** $156m
- **Tourism consumption at basic prices:** $2,100m
  - **Direct tourism consumption:** $1,700m
  - **Indirect tourism consumption:** $400m

**Direct tourism GDP/GSP:** $940m

- **Net taxes on indirect tourism consumption:** $118m
- **Net taxes on direct tourism consumption:** $78m
- **Direct tourism gross value added (GVA):** $862m
- **Direct tourism employment:** 11,405

**I-O multipliers**

**Total flow-on tourism output:** $3927m

- **Net taxes on total flow-on tourism consumption:** $236m
- **Total flow-on tourism value added:** $1,770m
- **Total flow-on tourism employment:** 19,389

**Total flow-on tourism GDP/GSP:** $2,006m
Travel and travellers to the Great Southern Touring Route

Year ended September 2013

Prepared for the Great Southern Touring Route
December 2013
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Key Results</td>
<td>4</td>
</tr>
<tr>
<td>Expenditure</td>
<td>8</td>
</tr>
<tr>
<td>Insights</td>
<td>10</td>
</tr>
<tr>
<td>Total Travel</td>
<td>14</td>
</tr>
<tr>
<td>International Travel</td>
<td>18</td>
</tr>
<tr>
<td>Domestic Overnight Travel</td>
<td>38</td>
</tr>
<tr>
<td>Domestic Daytrip Travel</td>
<td>57</td>
</tr>
<tr>
<td>Tourist Accommodation</td>
<td>69</td>
</tr>
<tr>
<td>Notes</td>
<td>74</td>
</tr>
</tbody>
</table>
Introduction

- This report provides a detailed analysis of international and domestic travel and travellers to any destination within the Great Southern Touring Route (GSTR) region in the year ended September 2013. It also provides analysis of tourist accommodation capacity in the year ended June 2013. The aim is to deliver a comprehensive picture of travel trends, behaviour and visitor characteristics.

- The results from the International Visitor Survey (IVS) and the National Visitor Survey (NVS) are based on data for the period year ended September 2009 to year ended September 2013. The results from the Survey of Tourist Accommodation (STA) are based on data for the period September quarter 2011 to June quarter 2013.

- The report is split into eight sections: **Key Results; Expenditure; Insights; Total Travel; International Travel; Domestic Overnight Travel; Domestic Daytrips; and Tourist Accommodation.**

- **Note:** Percentage change figures provided in this report do not necessarily represent statistically significant change.
Key Results
### Total travel to the GSTR
- 12.7 million visitors, down by 7.9%.
  - 12.1 million visitors (excluding international day visitors), down by 8.4%.
- 13.0 million nights, down by 2.3%.
- $2.4 billion\(^\#\) in visitor expenditure, down by 8.7%.

### International overnight travel to the GSTR
- 197,100 visitors, up by 4.9%.
- 2.2 million nights, down by 3.0%.
- $148 million\(^\#\) in visitor expenditure, down by 22.8%.
- **Average annual growth in the period YE Sep 09 to YE Sep 13:**
  - visitors (+1.6%) and nights (+8.8%).

### International daytrip visitors to selected destinations within the GSTR
- 556,800 visitors, up by 2.8%.
- **Average annual growth in the period YE Sep 11 to YE Sep 13:**
  - daytrip visitors (+4.4%).

\(^\#\) Expenditure estimates are derived using information from TRA’s modelled visitor expenditure in Australia's region, YE Sep 13.

---

**Sources:** IVS YE Sep 13, Tourism Research Australia (TRA); & NVS YE Sep 13, TRA
Domestic overnight travel to the GSTR
- 3.8 million visitors, down by 4.5%.
- 10.8 million nights, down by 2.1%.
- $1.5 billion# in visitor expenditure, down by 6.0%.
- Average annual growth in the period YE Sep 09 to YE Sep 13: visitors (+2.2%) and nights (+2.7%).

Domestic daytrips to the GSTR
- 8.2 million visitors, down by 10.3%.
- $811 million# in visitor expenditure, down by 10.2%.
- Average annual growth in the period YE Sep 09 to YE Sep 13: daytrip visitors (-1.8%).

# Expenditure estimates are derived using information from TRA's modelled visitor expenditure in Australia's region, YE Sep 13.
Hotels, motels and serviced apartments with 15+ rooms in the GSTR*

- 165 establishments, up by 1.2%.
- 2,299 employed persons, up by 0.8%.
- 4,995 rooms, up by 0.2%.
- 14,089 bed spaces, up by 0.2%.
- $121.8 million in takings, down by 1.6%.

Month of Jun 13 on month of Jun 12

- 37.6% in occupancy rate, down 3.7% pts.

* excludes Werribee, Bacchus Marsh Region and Gordon (Wyndham (C), Moorabool (S) - Ballan and Moorabool (S) - West). May include data for West Wimmera.

Sources: STA Sep qtr 11 to Jun qtr 13, ABS
Visitor expenditure - YE Sep 13

<table>
<thead>
<tr>
<th>Travel aspect</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
</tr>
</thead>
<tbody>
<tr>
<td>International overnight</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total ($ million)</td>
<td>$192</td>
<td>$148</td>
<td>-22.8%</td>
</tr>
<tr>
<td>Per night ($)</td>
<td>$85</td>
<td>$68</td>
<td>-20.3%</td>
</tr>
<tr>
<td>Domestic overnight</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total ($ million)</td>
<td>$1,551</td>
<td>$1,458</td>
<td>-6.0%</td>
</tr>
<tr>
<td>Per night ($)</td>
<td>$141</td>
<td>$135</td>
<td>-4.0%</td>
</tr>
<tr>
<td>Domestic daytrips</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total ($ million)</td>
<td>$904</td>
<td>$811</td>
<td>-10.2%</td>
</tr>
<tr>
<td>Per visitor ($)</td>
<td>$99</td>
<td>$99</td>
<td>0.0%</td>
</tr>
<tr>
<td>Total travel</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total ($ million)</td>
<td>$2,646</td>
<td>$2,417</td>
<td>-8.7%</td>
</tr>
</tbody>
</table>

In YE Sep 13

- Visitors spent an estimated $2.4 billion in the GSTR - down by 8.7% on YE Sep 12.
- Domestic overnight visitors spent $1.5 billion (-6.0%), international overnight visitors spent $148 million (-22.8%) while domestic daytrip visitors spent $811 million (-10.2%).

# Expenditure estimates are derived using information from TRA’s modelled visitor expenditure in Australia’s region, YE Sep 12 and YE Sep 13.
International overnight travellers to the GSTR

In the YE Sep 13, a typical international overnight visitor to the GSTR:

- Travelled for the purpose of ‘holiday / pleasure’.
- Spent $68\# per night.
- Came from United Kingdom.
- Stayed for 11.1 nights in the region.
- Left Australia in the March quarter.
- Stayed at a ‘home of friend or relative’.
- Used ‘rental car’ as transport.
- Favourite activity was to ‘eat out at restaurants and / or cafe’.
- Travelled ‘alone’.
- Was visiting Australia for the first time.
- Pre-arranged airfares within Australia (when travelling on a package).
- Used the internet as an information source for the trip.
- Booked all or part of the trip on the internet.
- Was aged 42.2.
- Was male.
- Lived as a ‘couple’

\# Expenditure estimates are derived using information from TRA’s modelled visitor expenditure in Australia’s region, YE Sep 13.

Source: IVS YE Sep 13, TRA
Domestic overnight travellers to the GSTR

In the YE Sep 13, a typical domestic overnight visitor to the GSTR:
- Travelled for the purpose of ‘holiday or leisure’.
- Spent $135# per night.
- Came from Melbourne.
- Stayed for 2.9 nights in the region.
- Returned home in January.
- Stayed in a ‘friends or relatives property’.
- Used ‘private or company vehicle’ as transport.
- Favourite activity was to ‘eat out at restaurants’.
- Travelled as an ‘adult couple’.
- Used the internet as an information source for the trip.
- Was aged 46.3.
- Was female.
- Had an average annual household income of $104,833.

# Expenditure estimates are derived using information from TRA’s modelled visitor expenditure in Australia’s region, YE Sep 13.

Source: NVS YE Sep 13, TRA
Domestic daytrip travellers to the GSTR

In the YE Sep 13, a typical domestic daytrip visitor to the GSTR:
- Travelled for the purpose of ‘holiday or leisure’.
- Spent $99 per trip#.
- Came from Melbourne.
- Travelled in December.
- Used ‘private or company vehicle’ as transport.
- Favourite activity was to ‘eat out at restaurants’.
- Was aged 46.2.
- Was male.
- Had an average annual household income of $96,397.

# Expenditure estimates are derived using information from TRA’s modelled visitor expenditure in Australia’s region, YE Sep 13.
Total Travel

Travel to the Great Southern Touring Route by domestic and international visitors aged 15 and over.

PLEASE NOTE:
The data used is subject to sampling variability. Users are advised to consult the data confidence tables contained in publications relevant to the NVS and IVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.
In YE Sep 13
• The GSTR received nearly 12.7 million overnight and daytrip visitors - down by 7.9% on YE Sep 12.

• Excluding international day visitors, the GSTR received over 12.1 million visitors - down by 8.4% on YE Sep 12 and by 2.4% on YE Sep 09.

• Visitors spent nearly 13.0 million nights in the GSTR - down by 2.3% on YE Sep 12, but up by 15.2% on YE Sep 09.

• On average, visitors stayed for 3.3 nights in the GSTR – up by 0.1 night on YE Sep 12 and by 0.2 nights on YE Sep 09.

Sources: IVS & NVS, YE Sep 13, TRA
## Visitors by area / tourism region

### Total visitors (’000)

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR&lt;sup&gt;1&lt;/sup&gt;</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>621</td>
<td>527</td>
<td>515</td>
<td>639</td>
<td>642</td>
<td>0.4%</td>
<td>3.3%</td>
<td>0.8%</td>
<td>5.3%</td>
</tr>
<tr>
<td>Geelong TR&lt;sup&gt;1&lt;/sup&gt;</td>
<td>3,937</td>
<td>3,848</td>
<td>3,984</td>
<td>3,836</td>
<td>3,655</td>
<td>-4.7%</td>
<td>-7.2%</td>
<td>-1.8%</td>
<td>30.1%</td>
</tr>
<tr>
<td>Western TR&lt;sup&gt;1&lt;/sup&gt;</td>
<td>4,027</td>
<td>3,972</td>
<td>4,072</td>
<td>4,430</td>
<td>3,846</td>
<td>-13.2%</td>
<td>-4.5%</td>
<td>-1.1%</td>
<td>31.7%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>559</td>
<td>672</td>
<td>499</td>
<td>567</td>
<td>627</td>
<td>10.6%</td>
<td>12.2%</td>
<td>2.9%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>612</td>
<td>514</td>
<td>674</td>
<td>833</td>
<td>660</td>
<td>-20.8%</td>
<td>7.8%</td>
<td>1.9%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Ballarat TR&lt;sup&gt;1&lt;/sup&gt;</td>
<td>2,054</td>
<td>2,075</td>
<td>1,872</td>
<td>2,165</td>
<td>2,014</td>
<td>-7.0%</td>
<td>-1.9%</td>
<td>-0.5%</td>
<td>16.6%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds&lt;sup&gt;1&lt;/sup&gt;</td>
<td>831</td>
<td>1,000</td>
<td>1,028</td>
<td>971</td>
<td>876</td>
<td>-9.8%</td>
<td>5.4%</td>
<td>1.3%</td>
<td>7.2%</td>
</tr>
<tr>
<td>GSTR&lt;sup&gt;2&lt;/sup&gt;</td>
<td>12,426</td>
<td>12,879</td>
<td>12,968</td>
<td>13,770</td>
<td>12,681</td>
<td>-7.9%</td>
<td>2.1%</td>
<td>0.5%</td>
<td></td>
</tr>
<tr>
<td>GSTR&lt;sup&gt;1&lt;/sup&gt;</td>
<td>12,426</td>
<td>12,409</td>
<td>12,458</td>
<td>13,229</td>
<td>12,124</td>
<td>-8.4%</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

<sup>1</sup> excluding international day visitors  
<sup>2</sup> including international day visitors  
* includes Horsham, Horsham region, Hamilton and Southern Grampians

### In YE Sep 13

- **Compared to YE Sep 12**: Western Grampians* (10.6%) had the largest increase in total visitors, while Central Highlands TR (-20.8%) had the largest decrease.

- Western TR (31.7%) contributed more visitors to the GSTR than any other tourism region or area, while Werribee (5.3%) contributed the least.
## Nights by area / tourism region

### Total nights (000)

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>277</td>
<td>396</td>
<td>442</td>
<td>625</td>
<td>500</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.9%</td>
<td>5.2</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>2,881</td>
<td>3,860</td>
<td>2,929</td>
<td>3,419</td>
<td>2,914</td>
<td>-14.8%</td>
<td>1.2%</td>
<td>0.3%</td>
<td>22.5%</td>
<td>3.2</td>
</tr>
<tr>
<td>Western TR</td>
<td>5,028</td>
<td>5,355</td>
<td>5,055</td>
<td>5,350</td>
<td>5,723</td>
<td>7.0%</td>
<td>13.8%</td>
<td>3.3%</td>
<td>44.2%</td>
<td>3.3</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>628</td>
<td>730</td>
<td>595</td>
<td>594</td>
<td>805</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>6.2%</td>
<td>2.9</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>972</td>
<td>691</td>
<td>837</td>
<td>948</td>
<td>1,072</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>8.3%</td>
<td>2.9</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>977</td>
<td>1,117</td>
<td>1,388</td>
<td>1,653</td>
<td>1,369</td>
<td>-17.2%</td>
<td>na</td>
<td>na</td>
<td>10.6%</td>
<td>2.7</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>481</td>
<td>533</td>
<td>798</td>
<td>673</td>
<td>577</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>4.5%</td>
<td>2.4</td>
</tr>
<tr>
<td>GSTR</td>
<td>11,244</td>
<td>12,681</td>
<td>12,044</td>
<td>13,262</td>
<td>12,958</td>
<td>-2.3%</td>
<td>15.2%</td>
<td>3.6%</td>
<td>3.3%</td>
<td>3.3</td>
</tr>
</tbody>
</table>

* excluding day visitors  
* includes Horsham, Horsham region, Hamilton and Southern Grampians

**Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY**

Note: change analysis should not be used on statistically unreliable estimates or results.

### In YE Sep 13

- **Compared to YE Sep 12**: Western TR (7.0%) had the largest increase in total nights, while Ballarat TR (-17.2%) had the largest decrease.
- Western TR (44.2%) contributed more nights in the GSTR than any other tourism region or area, while Werribee (3.9%) contributed the least.
- Western TR (3.3 nights) had the longest average stay by total overnight visitors, while Ballarat TR (2.7 nights) had the shortest average stay.
International Travel

Travel to the Great Southern Touring Route by international visitors aged 15 and over.

PLEASE NOTE:

The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the IVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

Some results may be below the data confidence intervals used by Tourism Victoria, i.e. 5,000 for visitors and 500,000 for nights. Any such estimates are for INTERNAL USE ONLY.
## Total, overnight and day visitors

### Total international visitors ('000)

<table>
<thead>
<tr>
<th>Place visited</th>
<th>Type of visitor</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Overnight</td>
<td>16</td>
<td>10.9%</td>
<td>21</td>
<td>12.8%</td>
<td>24</td>
<td>14.0%</td>
<td>-16.1%</td>
</tr>
<tr>
<td></td>
<td>Day</td>
<td>134</td>
<td>89.1%</td>
<td>142</td>
<td>87.2%</td>
<td>149</td>
<td>86.0%</td>
<td>-5.2%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>150</td>
<td></td>
<td>163</td>
<td></td>
<td>173</td>
<td></td>
<td>-6.7%</td>
</tr>
<tr>
<td>Ballarat</td>
<td>Overnight</td>
<td>156</td>
<td>33.1%</td>
<td>165</td>
<td>32.1%</td>
<td>153</td>
<td>29.1%</td>
<td>8.5%</td>
</tr>
<tr>
<td>Sovereign Hill</td>
<td>Day</td>
<td>315</td>
<td>66.9%</td>
<td>348</td>
<td>67.9%</td>
<td>374</td>
<td>70.9%</td>
<td>6.3%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>471</td>
<td></td>
<td>513</td>
<td></td>
<td>527</td>
<td></td>
<td>6.9%</td>
</tr>
<tr>
<td>Great Ocean Road or Twelve Apostles</td>
<td>Overnight</td>
<td>12</td>
<td>43.4%</td>
<td>10</td>
<td>38.3%</td>
<td>11</td>
<td>36.8%</td>
<td>-8.1%</td>
</tr>
<tr>
<td></td>
<td>Day</td>
<td>15</td>
<td>56.6%</td>
<td>17</td>
<td>61.7%</td>
<td>18</td>
<td>63.2%</td>
<td>1.8%</td>
</tr>
<tr>
<td></td>
<td>Total</td>
<td>27</td>
<td></td>
<td>27</td>
<td></td>
<td>29</td>
<td></td>
<td>-1.8%</td>
</tr>
<tr>
<td>Daylesford</td>
<td>Overnight</td>
<td>178</td>
<td>27.5%</td>
<td>192</td>
<td>27.3%</td>
<td>188</td>
<td>25.8%</td>
<td>4.9%</td>
</tr>
<tr>
<td>Hepburn Springs</td>
<td>Day</td>
<td>469</td>
<td>72.5%</td>
<td>511</td>
<td>72.7%</td>
<td>542</td>
<td>74.2%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Macedon</td>
<td>Total</td>
<td>648</td>
<td></td>
<td>702</td>
<td></td>
<td>729</td>
<td></td>
<td>3.3%</td>
</tr>
</tbody>
</table>

# excludes any other places visited within the GSTR region by international day visitors

### In YE Sep 13

- The GSTR received 753,900 international visitors – up by 3.3% on YE Sep 12 and by 16.4% by YE Sep 10.
- Nearly ¾ (73.9%) were international day visitors – up by 2.8% on YE Sep 12 and by 18.7% on YE Sep 10.
- Of the three surveyed places, ‘Great Ocean Road or Twelve Apostles’ received the most international day visitors (397,400 - up by 6.3% on YE Sep 12). ‘Ballarat Sovereign Hill’ received the 2nd most (141,200 - down by 5.2% on YE Sep 12), while ‘Daylesford Hepburn Springs Macedon’ received the least (18,800 - up by 1.8% on YE Sep 12).

Source: IVS YE Sep 13, TRA
International overnight travel

- The GSTR received 197,100 international overnight visitors - up by 4.9% on YE Sep 12 and by 6.7% on YE Sep 09.
- Almost 3/5 (59.7%) of visitors to regional Victoria visited the GSTR - up by 2.0% pts on YE Sep 12 and by 1.7% pts on YE Sep 09.
- Visitors spent nearly 2.2 million nights in the GSTR - down by 3.0% on YE Sep 12, but up by 40.2% on YE Sep 09.
- The GSTR received over 2/5 (41.8%) of nights spent in regional Victoria - unchanged on YE Sep 12, but up by 4.6% pts on YE Sep 09.

Source: IVS YE Sep 13, TRA
Average annual growth by overnight visitors

YE Sep 09 to YE Sep 13

• Over the period, the GSTR had an average annual growth of 1.6% in international overnight visits.

• The GSTR had a higher growth than regional Victoria, but lower than Australia, Victoria and Melbourne tourism region.

• Over the period, the GSTR had an average annual growth of 8.8% in international visitor nights.

• The GSTR had a higher growth than Australia, Victoria, regional Victoria and Melbourne tourism region.
Average length of stay by overnight visitors

In YE Sep 13
• International overnight visitors stayed, on average, 11.1 nights in the GSTR.
• The average stay was down by 0.9 nights on YE Sep 12, but up by 2.7 nights on YE Sep 09.

Source: IVS YE Sep 13, TRA
### Overnight visitors by area & tourism region

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>5</td>
<td>4</td>
<td>7</td>
<td>9</td>
<td>9</td>
<td>-3.2%</td>
<td>63.7%</td>
<td>13.1%</td>
<td>4.5%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>35</td>
<td>39</td>
<td>39</td>
<td>39</td>
<td>44</td>
<td>13.3%</td>
<td>26.0%</td>
<td>6.0%</td>
<td>22.4%</td>
</tr>
<tr>
<td>Western TR</td>
<td>133</td>
<td>128</td>
<td>137</td>
<td>125</td>
<td>136</td>
<td>8.7%</td>
<td>2.8%</td>
<td>0.7%</td>
<td>69.2%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>7</td>
<td>7</td>
<td>5</td>
<td>7</td>
<td>10</td>
<td>39.2%</td>
<td>41.0%</td>
<td>9.0%</td>
<td>5.2%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>27</td>
<td>24</td>
<td>25</td>
<td>24</td>
<td>26</td>
<td>8.2%</td>
<td>-3.7%</td>
<td>-0.9%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>18</td>
<td>16</td>
<td>21</td>
<td>24</td>
<td>20</td>
<td>-16.1%</td>
<td>14.0%</td>
<td>3.3%</td>
<td>10.3%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>4</td>
<td>4</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
</tr>
<tr>
<td>GSTR</td>
<td>185</td>
<td>178</td>
<td>192</td>
<td>188</td>
<td>197</td>
<td>4.9%</td>
<td>6.7%</td>
<td>1.6%</td>
<td></td>
</tr>
</tbody>
</table>

* includes Horsham, Horsham region, Hamilton and Southern Grampians

**Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY**

Note: change analysis should not be used on statistically unreliable estimates or results.

In YE Sep 13

- ** Compared to YE Sep 12: ** Western Grampians (39.2%) had the largest increase in international overnight visitors, while Ballarat TR (-16.1%) had the largest decrease.
- Western TR (69.2%) contributed more international overnight visitors to the GSTR than any other tourism region or area, while Daylesford & Surrounds (2.0%) contributed the least.

Source: IVS YE Sep 13, TRA
### Nights by area & tourism region

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>57</td>
<td>160</td>
<td>174</td>
<td>275</td>
<td>311</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>14.2%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>558</td>
<td>664</td>
<td>635</td>
<td>753</td>
<td>492</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>22.5%</td>
</tr>
<tr>
<td>Western TR</td>
<td>530</td>
<td>600</td>
<td>475</td>
<td>615</td>
<td>860</td>
<td>39.8%</td>
<td>62.4%</td>
<td>12.9%</td>
<td>39.3%</td>
<td>6.3</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>62</td>
<td>81</td>
<td>50</td>
<td>84</td>
<td>69</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.2%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>146</td>
<td>62</td>
<td>80</td>
<td>124</td>
<td>117</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>5.4%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>172</td>
<td>122</td>
<td>256</td>
<td>342</td>
<td>278</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>12.7%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>34</td>
<td>25</td>
<td>39</td>
<td>62</td>
<td>59</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>2.7%</td>
</tr>
<tr>
<td>GSTR</td>
<td>1,559</td>
<td>1,714</td>
<td>1,718</td>
<td>2,255</td>
<td>2,186</td>
<td>-3.0%</td>
<td>40.2%</td>
<td>8.8%</td>
<td>11.1</td>
<td></td>
</tr>
</tbody>
</table>

* Includes Horsham, Horsham region, Hamilton and Southern Grampians

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### In YE Sep 13

- **Compared to YE Sep 12:** Western TR (39.8%) had an increase in international nights.
- Western TR (39.3%) contributed more international nights in the GSTR than any other tourism region or area, Daylesford and Surrounds (2.7%) contributed the least.
- International visitors stayed for 6.3 nights in Western TR.

Source: IVS YE Sep 13, TRA
Purpose of visit by overnight visitors

In YE Sep 13

- 'Holiday / pleasure' (71.5%) was the most popular purpose of visit for international overnight visitors to the GSTR.
  - It was also the most popular to Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Ballarat TR.

- 'Visit friends and relatives' (22.1%) was the 2nd most popular purpose of visit.
  - It was the most popular to Werribee and Daylesford & Surrounds.

- 'Holiday / pleasure' (41.8%) was the most popular purpose of visit in terms of international nights in the GSTR.
  - It was also the most popular in Western TR, Western Grampians* and Central Highlands TR.

- 'Visit friends and relatives' (31.8%) was the 2nd most popular purpose of visit.
  - It was the most popular in Werribee, Geelong TR and Ballarat TR.

- 'Employment' was the most popular in Daylesford & Surrounds.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Note: Visitors may have had more than one purpose of visit.

Source: IVS YE Sep 13, TRA
## International Overnight Visitors (000)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Source market</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>% contribution to GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>42</td>
<td>42</td>
<td>39</td>
<td>31</td>
<td>38</td>
<td>23.7%</td>
<td>-9.1%</td>
<td>-2.3%</td>
<td>19.5%</td>
</tr>
<tr>
<td>2</td>
<td>New Zealand</td>
<td>20</td>
<td>23</td>
<td>23</td>
<td>23</td>
<td>24</td>
<td>1.3%</td>
<td>17.0%</td>
<td>4.0%</td>
<td>12.0%</td>
</tr>
<tr>
<td>3</td>
<td>Germany</td>
<td>18</td>
<td>16</td>
<td>16</td>
<td>19</td>
<td>19</td>
<td>2.7%</td>
<td>6.5%</td>
<td>1.6%</td>
<td>9.9%</td>
</tr>
<tr>
<td>4</td>
<td>USA includes Hawaii</td>
<td>16</td>
<td>15</td>
<td>15</td>
<td>15</td>
<td>14</td>
<td>-5.0%</td>
<td>-11.8%</td>
<td>-3.1%</td>
<td>7.1%</td>
</tr>
<tr>
<td>5</td>
<td>China (excludes SARs and)</td>
<td>4</td>
<td>4</td>
<td>6</td>
<td>7</td>
<td>13</td>
<td>75.8%</td>
<td>230.6%</td>
<td>34.8%</td>
<td>6.7%</td>
</tr>
<tr>
<td>6</td>
<td>France</td>
<td>8</td>
<td>6</td>
<td>6</td>
<td>9</td>
<td>8</td>
<td>-2.2%</td>
<td>7.2%</td>
<td>1.8%</td>
<td>4.3%</td>
</tr>
<tr>
<td>7</td>
<td>Scandinavia</td>
<td>6</td>
<td>7</td>
<td>7</td>
<td>7</td>
<td>8</td>
<td>14.5%</td>
<td>45.5%</td>
<td>9.8%</td>
<td>4.1%</td>
</tr>
<tr>
<td>8</td>
<td>Switzerland</td>
<td>6</td>
<td>4</td>
<td>7</td>
<td>4</td>
<td>8</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.8%</td>
</tr>
<tr>
<td>9</td>
<td>Italy</td>
<td>7</td>
<td>4</td>
<td>8</td>
<td>6</td>
<td>5</td>
<td>-1.3%</td>
<td>-19.2%</td>
<td>-5.2%</td>
<td>2.8%</td>
</tr>
<tr>
<td>10</td>
<td>Malaysia</td>
<td>4</td>
<td>4</td>
<td>5</td>
<td>5</td>
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<td>na</td>
<td>na</td>
<td>2.7%</td>
</tr>
<tr>
<td></td>
<td>Other Asia</td>
<td>2</td>
<td>1</td>
<td>2</td>
<td>5</td>
<td>5</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>2.8%</td>
</tr>
<tr>
<td></td>
<td>Other Europe</td>
<td>9</td>
<td>12</td>
<td>12</td>
<td>12</td>
<td>13</td>
<td>8.1%</td>
<td>37.8%</td>
<td>8.4%</td>
<td>6.6%</td>
</tr>
<tr>
<td></td>
<td>Other countries</td>
<td>9</td>
<td>11</td>
<td>9</td>
<td>9</td>
<td>7</td>
<td>-26.9%</td>
<td>-27.1%</td>
<td>-7.6%</td>
<td>3.5%</td>
</tr>
<tr>
<td></td>
<td>Total GSTR</td>
<td>185</td>
<td>178</td>
<td>192</td>
<td>188</td>
<td>197</td>
<td>4.9%</td>
<td>6.7%</td>
<td>1.6%</td>
<td></td>
</tr>
</tbody>
</table>

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**In YE Sep 13**

- United Kingdom (19.5%) was the largest source market of international overnight visitors to the GSTR - up by 23.7% on YE Sep 12, but down by 9.1% on YE Sep 09.
- New Zealand (12.0%) was the 2nd largest source market - up by 1.3% on YE Sep 12 and by 17.0% on YE Sep 09.
- Germany (9.9%) was the 3rd largest source market - up by 2.7% on YE Sep 12 and by 6.5% on YE Sep 09.

Source: IVS YE Sep 13, TRA
### Origin by nights

**International nights ('000)**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Source market</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>% contribution to GSTR</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>308</td>
<td>424</td>
<td>345</td>
<td>285</td>
<td>333</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>15.2%</td>
</tr>
<tr>
<td>2</td>
<td>India</td>
<td>40</td>
<td>115</td>
<td>51</td>
<td>106</td>
<td>190</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>8.7%</td>
</tr>
<tr>
<td>3</td>
<td>New Zealand</td>
<td>93</td>
<td>123</td>
<td>176</td>
<td>284</td>
<td>140</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>6.4%</td>
</tr>
<tr>
<td>4</td>
<td>China (excludes SARs and (excludes SARs and (excludes SARs and ) China (excludes SARs and ) China (excludes SARs and ) China (excludes SARs and ) China (excludes SARs and )</td>
<td>102</td>
<td>152</td>
<td>196</td>
<td>276</td>
<td>133</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>6.1%</td>
</tr>
<tr>
<td>5</td>
<td>USA includes Hawaii</td>
<td>115</td>
<td>75</td>
<td>127</td>
<td>110</td>
<td>132</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>6.0%</td>
</tr>
<tr>
<td>6</td>
<td>Germany</td>
<td>134</td>
<td>50</td>
<td>39</td>
<td>227</td>
<td>30</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>4.1%</td>
</tr>
<tr>
<td>7</td>
<td>Taiwan</td>
<td>3</td>
<td>28</td>
<td>10</td>
<td>17</td>
<td>85</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.9%</td>
</tr>
<tr>
<td>8</td>
<td>Scandinavia</td>
<td>35</td>
<td>40</td>
<td>38</td>
<td>35</td>
<td>67</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.0%</td>
</tr>
<tr>
<td>9</td>
<td>France</td>
<td>34</td>
<td>33</td>
<td>69</td>
<td>68</td>
<td>66</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.0%</td>
</tr>
<tr>
<td>10</td>
<td>Hong Kong (SAR of China)</td>
<td>26</td>
<td>33</td>
<td>40</td>
<td>20</td>
<td>59</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>2.7%</td>
</tr>
<tr>
<td></td>
<td>Other Asia</td>
<td>34</td>
<td>47</td>
<td>32</td>
<td>203</td>
<td>378</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>17.3%</td>
</tr>
<tr>
<td></td>
<td>Other Europe</td>
<td>16</td>
<td>142</td>
<td>35</td>
<td>170</td>
<td>714</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>5.2%</td>
</tr>
<tr>
<td></td>
<td>Other countries</td>
<td>120</td>
<td>68</td>
<td>90</td>
<td>104</td>
<td>111</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>5.1%</td>
</tr>
<tr>
<td></td>
<td>Total GSTR</td>
<td>1,559</td>
<td>1,714</td>
<td>1,718</td>
<td>2,255</td>
<td>2,186</td>
<td>-3.0%</td>
<td>40.2%</td>
<td>8.8%</td>
<td>11.1%</td>
<td></td>
</tr>
</tbody>
</table>

**Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY**

*Note: change analysis should not be used on statistically unreliable estimates or results.*

**In YE Sep 13**

- No individual source market had estimates considered statistically reliable.

Source: IVS YE Sep 13, TRA
Quarter overnight visitors departed Australia

In YE Sep 13
- March (35.1%) was the most popular quarter to depart Australia for international overnight visitors who had visited the GSTR.
  - It was also the most popular quarter for visitors who had been to Werribee, Western TR and Daylesford & Surrounds.
- December quarter was the most popular for visitors who had been to Geelong TR, Western Grampians*, Central Highlands TR and Ballarat TR.
  - June (16.2%) was the least popular quarter.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: IVS YE Sep 13, TRA
Top 5 accommodation types used for nights

In YE Sep 13

- ‘Home of friend or relative’ (36.8%) was the most popular accommodation type used for international visitor nights in the GSTR.
- It was also the most popular in Werribee, Geelong TR and Ballarat TR.
- ‘Rented house / apartment / unit / flat’ (21.0%) was the 2nd most popular accommodation used.
- It was the most popular in Central Highlands TR.
- ‘Other non-commercial property’ was the most popular in Western TR.
- ‘Homestay’ was the most popular in Western Grampians* and Daylesford & Surrounds.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: IVS YE Sep 13, TRA
Top 5 transport types used by overnight visitors

- **Rental car** (37.3%) was the most popular transport type used by international overnight visitors to the GSTR.
  - It was also the most popular to Western TR, Western Grampians* and Central Highlands TR.
- **Private or company car** (31.9%) was the 2nd most popular transport used.
  - It was the most popular to Werribee, Geelong TR, Ballarat TR and Daylesford & Surrounds.
- **Aircraft** (10.9%)
- **Self-drive van, motor-home or campervan** (10.0%)
- **Charter or tour bus** (5.4%)

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

In YE Sep 13

- 'Rental car' (37.3%) was the most popular transport type used by international overnight visitors to the GSTR.
- It was also the most popular to Western TR, Western Grampians* and Central Highlands TR.
- 'Private or company car' (31.9%) was the 2nd most popular transport used.
- It was the most popular to Werribee, Geelong TR, Ballarat TR and Daylesford & Surrounds.

Source: IVS YE Sep 13, TRA
Top 5 activities undertaken by overnight visitors

% of visitors

91.0% 82.9% 76.9% 76.8% 70.4%

Eat out / dine at a restaurant and / or café
Sightseeing / looking around
Shopping for pleasure
Go to the beach
Visit national parks / State parks

In YE Sep 13

• ‘Eat out / dine at a restaurant and / or cafe’ (91.0%) was the most popular activity undertaken by international overnight visitors to the GSTR.

• ‘Sightseeing / looking around’ (82.9%) was the 2nd most popular activity.

• ‘Go to market’ was the most popular in Daylesford & Surrounds.

Source: IVS YE Sep 13, TRA

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Travel party by overnight visitors

- **'Alone'** (46.6%) was the largest travel party of international overnight visitors to the GSTR.
- It was also the largest to Werribee, Geelong TR, Western TR, Central Highlands, Ballarat TR and Daylesford & Surrounds.
- **'Adult couple'** (32.1%) was the 2nd largest travel party.
- It was the largest to Western Grampians.*

*includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: IVS YE Sep 13, TRA
First time or repeat visit; Group tour; and Travel package by overnight visitors

<table>
<thead>
<tr>
<th>LGA / tourism region</th>
<th>First time or return</th>
<th>Group tour</th>
<th>Travel package</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First time</td>
<td>Return</td>
<td>Yes</td>
</tr>
<tr>
<td>Werribee</td>
<td>29.5%</td>
<td>70.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>37.5%</td>
<td>62.5%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Western TR</td>
<td>59.5%</td>
<td>40.5%</td>
<td>1.3%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>46.9%</td>
<td>53.1%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>57.6%</td>
<td>42.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>41.2%</td>
<td>58.8%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>36.5%</td>
<td>63.5%</td>
<td>0.0%</td>
</tr>
<tr>
<td>GSTR</td>
<td>50.6%</td>
<td>49.4%</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

* includes Horsham, Horsham region, Hamilton and Southern Grampians

In YE Sep 13

- Over ½ (50.6%) of international overnight visitors to the GSTR were visiting Australia for the first time.
- **Western TR had the highest proportion of first time visitors, while Werribee had the highest proportion of return visitors.**
- Only 1.1% of visitors to the GSTR were travelling as part of group tour to Australia.
- **Western Grampians* had the highest proportion of group tour visitors.**
- Nearly 1/10 (9.1%) of visitors to the GSTR arrived in Australia on a travel package.
- **Central Highlands TR had the highest proportion of visitors who arrived on a travel package.**

Source: IVS YE Sep 13, TRA
Travel arrangements included in package by overnight visitors

Of those who arrived in Australia on a travel package (note: international fares is a prerequisite):

In YE Sep 13

• ‘Airfares within Australia’ (61.4%) was the most popular arrangement (other than international airfares) included in the travel package of international overnight visitors to the GSTR.

• It was also the most popular for visitors to Werribee, Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.

• ‘All accommodation’ was the most popular for visitors to Geelong TR.

• ‘Some accommodation in Australia’ was the most popular for visitors to Ballarat TR.

• ‘Most ground transport within Australia’ (41.0%) was the next most popular travel arrangement.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: IVS YE Sep 13, TRA
Information sources used by overnight visitors

- The 'internet' (56.1%) was the most popular information source of international overnight visitors to the GSTR.
- It was also the most popular for Geelong TR, Western TR, Western Grampians*, Central Highlands TR, Ballarat TR and Daylesford & Surrounds.
- 'Friend or relative living in Australia' (31.4%) was the 2nd most popular information source.
- It was the most popular for Werribee.
- Over 3/5 (61.4%) of overnight visitors to the GSTR used the internet to book all or part of their trip.
- Western Grampians* had the highest proportion of visitors who booked on the internet, while Werribee had the lowest proportion.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Age by overnight visitors

In YE Sep 13

• ‘25 to 34 years’ (25.2%) was the largest age group of international overnight visitors to the GSTR.
• ‘55 to 64 years’ (17.2%) was the 2nd largest age group.

• The average age of overnight visitors to GSTR was 42.2 years.
• Visitors to Daylesford & Surrounds (54.5 years) had the highest average age, while visitors to Western TR (40.7 years) had the lowest average age.

Source: IVS YE Sep 13, TRA
### Gender and marital status by overnight visitors

#### % of international overnight visitors

<table>
<thead>
<tr>
<th>LGA / tourism region</th>
<th>Gender</th>
<th>Marital status</th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Male</td>
<td>Female</td>
<td>Single ¹</td>
<td>Couple ²</td>
</tr>
<tr>
<td>Werribee</td>
<td>49.6%</td>
<td>50.4%</td>
<td>42.9%</td>
<td>54.4%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>56.0%</td>
<td>44.0%</td>
<td>34.5%</td>
<td>65.5%</td>
</tr>
<tr>
<td>Western TR</td>
<td>51.9%</td>
<td>48.1%</td>
<td>41.2%</td>
<td>58.6%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>54.9%</td>
<td>45.1%</td>
<td>36.6%</td>
<td>63.4%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>52.9%</td>
<td>47.1%</td>
<td>40.2%</td>
<td>58.9%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>61.4%</td>
<td>38.6%</td>
<td>37.9%</td>
<td>61.8%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>46.6%</td>
<td>53.4%</td>
<td>40.6%</td>
<td>59.4%</td>
</tr>
<tr>
<td>GSTR</td>
<td>52.7%</td>
<td>47.3%</td>
<td>41.3%</td>
<td>58.3%</td>
</tr>
</tbody>
</table>

¹ includes Horsham, Horsham region, Hamilton and Southern Grampians

² = married, de facto, living together

In YE Sep 13

- More international overnights visitors to the GSTR were male (52.7%) than female (47.3%).
- Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Ballarat TR had more male visitors, while Werribee and Daylesford & Surrounds had more females.
- Nearly 3/5 (58.3%) of overnight visitors to the GSTR were living as a 'couple'.
- 'Couple' was also the most common marital status of visitors to all tourism regions and areas.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Domestic Overnight Travel

Overnight travel to the Great Southern Touring Route by Australian residents aged 15 and over.

PLEASE NOTE:

The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the NVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

Some graphs may contain results below the data confidence intervals used by Tourism Victoria, i.e. 50,000 for visitors and 500,000 for nights. datainsights recommends that any such estimates should be for internal use only.
Domestic overnight travel

In YE Sep 13
• The GSTR received nearly 3.8 million domestic overnight visitors - down by 4.5% on YE Sep 12, but up by 9.2% on YE Sep 09.

• Nearly 1/3 (32.9%) of visitors to regional Victoria visited the GSTR – down by 1.3% pts on YE Sep 12 and by 0.2% pts on YE Sep 09.

• Visitors spent nearly 10.8 million nights in the GSTR - down by 2.1% on YE Sep 12, but up by 11.2% on YE Sep 09.

• The GSTR received over 3/10 (31.2%) of nights spent in regional Victoria - down by 0.4% pts on YE Sep 12, but by 0.6% pts on YE Sep 09.

Source: NVS YE Sep 13, TRA
Average annual growth for selected destinations

Over the period, the GSTR had an average annual growth of 2.2% in domestic overnight visitors.

The GSTR had a lower growth than Australia, Victoria, regional Victoria and Melbourne tourism region.

Over the period, the GSTR had an average annual growth of 2.7% in domestic visitor nights.

The GSTR had a higher growth than Australia, Victoria, regional Victoria and Melbourne tourism region.

Source: NVS YE Sep 13, TRA
Average length of stay (nights)

In YE Sep 13
• Domestic overnight visitors stayed, on average, 2.9 nights in the GSTR.
• The average stay was up by 0.1 night on YE Sep 12 and on YE Sep 09.

Source: NVS YE Sep 13, TRA
## Visitors by area and tourism region

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>102</td>
<td>77</td>
<td>77</td>
<td>135</td>
<td>87</td>
<td>-35.6%</td>
<td>-14.7%</td>
<td>-3.9%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>821</td>
<td>925</td>
<td>861</td>
<td>932</td>
<td>854</td>
<td>-8.4%</td>
<td>4.0%</td>
<td>1.0%</td>
<td>22.8%</td>
</tr>
<tr>
<td>Western TR</td>
<td>1,513</td>
<td>1,514</td>
<td>1,512</td>
<td>1,583</td>
<td>1,622</td>
<td>2.5%</td>
<td>7.2%</td>
<td>1.8%</td>
<td>43.2%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>258</td>
<td>216</td>
<td>242</td>
<td>224</td>
<td>270</td>
<td>20.5%</td>
<td>4.7%</td>
<td>1.1%</td>
<td>7.2%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>346</td>
<td>220</td>
<td>313</td>
<td>312</td>
<td>341</td>
<td>9.3%</td>
<td>-1.4%</td>
<td>-0.4%</td>
<td>9.1%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>372</td>
<td>476</td>
<td>466</td>
<td>612</td>
<td>483</td>
<td>-21.1%</td>
<td>29.8%</td>
<td>6.7%</td>
<td>12.9%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>196</td>
<td>242</td>
<td>292</td>
<td>300</td>
<td>240</td>
<td>-20.0%</td>
<td>22.4%</td>
<td>5.2%</td>
<td>6.4%</td>
</tr>
<tr>
<td>GSTR</td>
<td>3,438</td>
<td>3,516</td>
<td>3,624</td>
<td>3,930</td>
<td>3,753</td>
<td>-4.5%</td>
<td>9.2%</td>
<td>2.2%</td>
<td></td>
</tr>
</tbody>
</table>

* includes Horsham, Horsham region, Hamilton and Southern Grampians

In YE Sep 13

- **Compared to YE Sep 12:** Western Grampians* (20.5%) had the largest increase in visitors, while Werribee (-35.6%) had the largest decrease.
- **Western TR (43.2%)** contributed more visitors to the GSTR than any other tourism region or area, while Werribee (2.3%) contributed the least.

Source: NVS YE Sep 13, TRA
## Nights by area and tourism region

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>220</td>
<td>236</td>
<td>268</td>
<td>350</td>
<td>189</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>1.8%</td>
<td>2.2</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>2,323</td>
<td>3,196</td>
<td>2,294</td>
<td>2,666</td>
<td>2,422</td>
<td>-9.2%</td>
<td>4.3%</td>
<td>1.0%</td>
<td>22.5%</td>
<td>2.8</td>
</tr>
<tr>
<td>Western TR</td>
<td>4,498</td>
<td>4,755</td>
<td>4,580</td>
<td>4,735</td>
<td>4,863</td>
<td>2.7%</td>
<td>8.1%</td>
<td>2.0%</td>
<td>45.1%</td>
<td>3.0</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>566</td>
<td>649</td>
<td>540</td>
<td>510</td>
<td>736</td>
<td>44.3%</td>
<td>30.0%</td>
<td>6.8%</td>
<td>6.8%</td>
<td>2.7</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>826</td>
<td>629</td>
<td>757</td>
<td>824</td>
<td>955</td>
<td>15.9%</td>
<td>15.6%</td>
<td>3.7%</td>
<td>8.9%</td>
<td>2.8</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>805</td>
<td>995</td>
<td>1,129</td>
<td>1,311</td>
<td>1,091</td>
<td>-16.8%</td>
<td>35.5%</td>
<td>7.9%</td>
<td>10.1%</td>
<td>2.3</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>447</td>
<td>508</td>
<td>759</td>
<td>611</td>
<td>518</td>
<td>-15.2%</td>
<td>na</td>
<td>na</td>
<td>4.8%</td>
<td>2.2</td>
</tr>
<tr>
<td>GSTR</td>
<td>9,685</td>
<td>10,967</td>
<td>10,326</td>
<td>11,007</td>
<td>10,772</td>
<td>-2.1%</td>
<td>11.2%</td>
<td>2.7%</td>
<td>2.9</td>
<td></td>
</tr>
</tbody>
</table>

* Includes Horsham, Horsham region, Hamilton and Southern Grampians

Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY

Note: change analysis should not be used on statistically unreliable estimates or results.

### In YE Sep 13

- **Compared to YE Sep 12:** Western Grampians* (44.3%) had the largest increase in nights, while Ballarat TR (-16.8%) had the largest decrease.
- Western TR (45.1%) contributed more nights in the GSTR than any other tourism region or area, while Werribee contributed the least.
- Western TR (3 nights) had the longest average stay by domestic visitors, while Daylesford & Surrounds (2.2 nights) had the shortest.

Source: NVS YE Sep 13, TRA
In YE Sep 13

- ‘Holiday or leisure’ (53.2%) was the most popular purpose of visit for domestic overnight visitors to the GSTR.
  - It was also the most popular to Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.

- ‘Visit friends and relatives’ (35.3%) was the 2nd most popular purpose of visit.
  - It was the most popular to Werribee, Geelong TR and Ballarat TR.

- ‘Holiday or leisure’ (58.3%) was the most popular purpose of visit in terms of domestic nights in the GSTR.
  - It was also the most popular in Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.

- ‘Visit friends and relatives’ (31.1%) was the 2nd most popular purpose of visit.
  - It was the most popular in Werribee and Ballarat TR.

Note: Visitors may have had more than one purpose of visit

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
## Origin by visitors

<table>
<thead>
<tr>
<th>Source market</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>% contribution to GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Victoria</td>
<td>1,213</td>
<td>1,303</td>
<td>1,379</td>
<td>1,487</td>
<td>1,444</td>
<td>-2.9%</td>
<td>19.0%</td>
<td>4.5%</td>
<td>38.5%</td>
</tr>
<tr>
<td>Melbourne</td>
<td>1,630</td>
<td>1,582</td>
<td>1,696</td>
<td>1,824</td>
<td>1,698</td>
<td>-6.9%</td>
<td>4.2%</td>
<td>1.0%</td>
<td>45.2%</td>
</tr>
<tr>
<td>Victoria</td>
<td>2,843</td>
<td>2,884</td>
<td>3,075</td>
<td>3,311</td>
<td>3,141</td>
<td>-5.1%</td>
<td>10.5%</td>
<td>2.5%</td>
<td>83.7%</td>
</tr>
<tr>
<td>New South Wales</td>
<td>177</td>
<td>226</td>
<td>201</td>
<td>208</td>
<td>209</td>
<td>0.5%</td>
<td>18.1%</td>
<td>4.2%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Queensland</td>
<td>110</td>
<td>128</td>
<td>80</td>
<td>82</td>
<td>104</td>
<td>26.8%</td>
<td>-5.5%</td>
<td>-1.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>South Australia</td>
<td>192</td>
<td>188</td>
<td>187</td>
<td>227</td>
<td>201</td>
<td>-11.5%</td>
<td>4.7%</td>
<td>1.2%</td>
<td>5.4%</td>
</tr>
<tr>
<td>Western Australia</td>
<td>36</td>
<td>37</td>
<td>25</td>
<td>43</td>
<td>44</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>1.2%</td>
</tr>
<tr>
<td>Tasmania</td>
<td>31</td>
<td>30</td>
<td>25</td>
<td>24</td>
<td>28</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.7%</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>11</td>
<td>9</td>
<td>14</td>
<td>9</td>
<td>9</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.2%</td>
</tr>
<tr>
<td>Australian Capital Territory</td>
<td>38</td>
<td>13</td>
<td>18</td>
<td>28</td>
<td>16</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.4%</td>
</tr>
<tr>
<td>Interstate</td>
<td>595</td>
<td>631</td>
<td>549</td>
<td>620</td>
<td>612</td>
<td>-1.3%</td>
<td>2.9%</td>
<td>0.7%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Total GSTR</td>
<td>3,438</td>
<td>3,516</td>
<td>3,624</td>
<td>3,930</td>
<td>3,753</td>
<td>-4.5%</td>
<td>9.2%</td>
<td>2.2%</td>
<td></td>
</tr>
</tbody>
</table>

**Domestic overnight visitors ('000)**

In YE Sep 13

- Nearly ½ (45.2%) of domestic overnight visitors to the GSTR came from Melbourne - down by 6.9% on YE Sep 12, but up by 4.2% on YE Sep 09.
- Nearly 2/5 (38.5%) of visitors came from regional Victoria - down by 2.9% on YE Sep 12, but up by 19.0% on YE Sep 09.
- Over 1/8 (16.3%) of visitors came from interstate - down by 1.3% on YE Sep 12, but up by 2.9% on YE Sep 09.
- South Australia (5.4% of all visitors) was the biggest interstate market - down by 11.5% on YE Sep 12, but up by 4.7% on YE Sep 09.

Source: NVS YE Sep 13, TRA
Origin by nights

### Domestic nights ('000)

<table>
<thead>
<tr>
<th>Source market</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>% contribution to GSTR</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regional Victoria</td>
<td>3,199</td>
<td>3,371</td>
<td>3,927</td>
<td>4,329</td>
<td>3,706</td>
<td>-14.4%</td>
<td>15.8%</td>
<td>3.7%</td>
<td>34.4%</td>
<td>2.6</td>
</tr>
<tr>
<td>Melbourne</td>
<td>4,224</td>
<td>4,580</td>
<td>4,218</td>
<td>4,384</td>
<td>4,820</td>
<td>9.9%</td>
<td>14.1%</td>
<td>3.4%</td>
<td>44.7%</td>
<td>2.8</td>
</tr>
<tr>
<td>Victoria</td>
<td>7,423</td>
<td>7,951</td>
<td>8,144</td>
<td>8,713</td>
<td>8,526</td>
<td>-2.1%</td>
<td>14.9%</td>
<td>3.5%</td>
<td>79.1%</td>
<td>2.7</td>
</tr>
<tr>
<td>New South Wales</td>
<td>649</td>
<td>1,244</td>
<td>753</td>
<td>799</td>
<td>784</td>
<td>-1.9%</td>
<td>20.8%</td>
<td>4.8%</td>
<td>7.3%</td>
<td>3.5</td>
</tr>
<tr>
<td>Queensland</td>
<td>454</td>
<td>702</td>
<td>474</td>
<td>314</td>
<td>416</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>3.9%</td>
<td>4.0</td>
</tr>
<tr>
<td>South Australia</td>
<td>656</td>
<td>593</td>
<td>601</td>
<td>731</td>
<td>619</td>
<td>-15.3%</td>
<td>-5.6%</td>
<td>-1.4%</td>
<td>5.7%</td>
<td>3.1</td>
</tr>
<tr>
<td>Western Australia</td>
<td>148</td>
<td>181</td>
<td>104</td>
<td>210</td>
<td>192</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>1.8%</td>
<td>4.4</td>
</tr>
<tr>
<td>Tasmania</td>
<td>130</td>
<td>132</td>
<td>100</td>
<td>100</td>
<td>84</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.8%</td>
<td>3.0</td>
</tr>
<tr>
<td>Northern Territory</td>
<td>78</td>
<td>42</td>
<td>78</td>
<td>58</td>
<td>70</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.6%</td>
<td>7.8</td>
</tr>
<tr>
<td>Australian Capital Territory</td>
<td>146</td>
<td>123</td>
<td>71</td>
<td>82</td>
<td>81</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.8%</td>
<td>5.1</td>
</tr>
<tr>
<td>Interstate</td>
<td>2,261</td>
<td>3,016</td>
<td>2,181</td>
<td>2,294</td>
<td>2,246</td>
<td>-2.1%</td>
<td>-0.7%</td>
<td>-0.2%</td>
<td>20.9%</td>
<td>3.7</td>
</tr>
<tr>
<td>Total GSTR</td>
<td>9,685</td>
<td>10,967</td>
<td>10,326</td>
<td>11,007</td>
<td>10,772</td>
<td>-2.1%</td>
<td>11.2%</td>
<td>2.7%</td>
<td>2.9%</td>
<td></td>
</tr>
</tbody>
</table>

**Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY**

Note: change analysis should not be used on statistically unreliable estimates or results.

**In YE Sep 13**

- Over 2/5 (44.7%) of domestic nights in the GSTR came from Melbourne - up by 9.9% on YE Sep 12 and by 14.1% on YE Sep 09.
- Over 1/3 (34.4%) of nights came from regional Victoria - down by 14.4% on YE Sep 12, but up by 15.8% on YE Sep 09.
- Over 1/5 (20.9%) of nights came from interstate - down by 2.1% on YE Sep 12 and by 0.7% on YE Sep 09.
- New South Wales (7.3% of all nights) was the biggest interstate market - down by 1.9% on YE Sep 12, but up by 20.8% on YE Sep 09.
- Interstate visitors stayed, on average, 3.7 nights in the GSTR – 1 night longer than intrastate visitors.

Source: NVS YE Sep 13, TRA
Average annual growth for selected origin markets

**YE Sep 09 to YE Sep 13**

- Over the period, the GSTR had an average annual growth in domestic overnight **visitors** from regional Victoria, Melbourne, NSW and SA, but a decline from other interstate.
- The regional Victoria origin market experienced the biggest % growth.

- Over the period, the GSTR had an average annual growth in domestic visitor **nights** from regional Victoria, Melbourne and NSW, but a decline from South Australia and other interstate.
- NSW experienced the biggest % growth.

Source: NVS YE Sep 13, TRA
Month returned from visiting

In YE Sep 13

• January (14.5%) was the most popular month to return from a trip to the GSTR for domestic overnight visitors.

• It was also the most popular month for visitors to Geelong TR and Western TR. May was the most popular to Werribee. October was the most popular to Western Grampians* and Ballarat TR, while November was the most to Central Highlands TR and Daylesford & Surrounds.

• August (5.2%) was the least popular month to return.

• Visitors to the GSTR who returned from a trip in January had spent more nights (21.5%) in the region than visitors returning in any other month.

• It was also the most popular month for visitors to Geelong TR, Western TR, Central Highlands TR and Ballarat TR. April was the most popular to Daylesford & Surrounds. November was the most popular to Western Grampians*, while December was the most to Werribee.

• Visitors returning in August had spent the least nights (4.4%).

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
Top 5 accommodation types used for nights

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>% of Nights</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends or relatives property</td>
<td>38.1%</td>
</tr>
<tr>
<td>Caravan park or commercial camping ground</td>
<td>16.7%</td>
</tr>
<tr>
<td>Standard hotel, motor inn, below 4 star</td>
<td>10.9%</td>
</tr>
<tr>
<td>Rented house, apartment, flat or unit</td>
<td>10.5%</td>
</tr>
<tr>
<td>Own property</td>
<td>7.4%</td>
</tr>
</tbody>
</table>

In YE Sep 13
- ‘Friends or relatives property’ (38.1%) was the most popular accommodation type used for domestic visitor nights in the GSTR.
- ‘It was also the most popular in Werribee, Geelong TR, Western TR, Western Grampians*, Central Highlands and Ballarat TR.’
- ‘Rented house, apartment, flat or unit’ was the most popular in Daylesford & Surrounds.
- ‘Caravan park or commercial camping ground’ (16.7%) was the 2nd most popular accommodation used.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
Top 5 transport types used by visitors

In YE Sep 13

- ‘Private or company vehicle’ (88.5%) was by far the most popular transport type used by domestic overnight visitors to the GSTR.
- ‘Air transport’ (4.9%) was the 2nd most popular transport used.

Source: NVS YE Sep 13, TRA
Top 5 activities undertaken by visitors

In YE Sep 13

• ‘Eat out at restaurants’ (55.8%) was the most popular activity undertaken by domestic overnight visitors to the GSTR.
  • It was also the most popular in Western TR, Western Grampians*, Ballarat TR and Daylesford & Surrounds.

• ‘Visit friends and relatives’ (44.9%) was the 2nd most popular activity.
  • It was the most popular in Werribee and Geelong TR.
  • ‘Bushwalking or rainforest walks’ was the most popular in Central Highlands TR.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Travel party by visitors

- ‘Adult couple’ (30.5%) was the largest travel party of domestic overnight visitors to the GSTR.
- It was also the largest to Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.
- ‘Alone’ was the largest to Ballarat TR.
- ‘Family group’ (25.2%) was the 2nd largest travel party.
- It was the largest to Werribee.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
Information sources used by visitors

In YE Sep 13
• Nearly 2/5 (37.4%) of domestic overnight visitors to the GSTR did not get any information for their trip.
• The 'internet' (32.4%) was the most popular information source.
• It was also the most popular for all tourism regions and sub-areas.
• 'Previous visit' (28.3%) was the 2nd most popular information source.
• Over 1/5 (20.7%) of visitors to the GSTR used the internet to book all or part of the trip.
• Daylesford & Surrounds had the highest proportion of visitors who booked on the internet, while Western Grampians* had the lowest proportion.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Age by visitors

In YE Sep 13
• '55 to 64 years' (19.7%) was the largest age group of domestic overnight visitors to the GSTR.
• '45 to 54 years' (18.1%) was the 2nd largest age group.

• The average age of visitors to GSTR was 46.3 years.

• Visitors to Western Grampians* (51 years) had the highest average age, while visitors to Werribee (40 years) had the lowest average age.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
### Gender by visitors

<table>
<thead>
<tr>
<th>LGA / tourism region</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>52.9%</td>
<td>47.1%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>46.3%</td>
<td>53.9%</td>
</tr>
<tr>
<td>Western TR</td>
<td>49.6%</td>
<td>50.4%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>58.1%</td>
<td>41.9%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>56.3%</td>
<td>43.7%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>48.7%</td>
<td>51.3%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>45.8%</td>
<td>54.2%</td>
</tr>
<tr>
<td>GSTR</td>
<td>49.4%</td>
<td>50.6%</td>
</tr>
</tbody>
</table>

*includes Horsham, Horsham region, Hamilton and Southern Grampians.

### In YE Sep 13

- More domestic overnight visitors to the GSTR were female (50.6%) than male (49.4%).
- Geelong TR, Western TR, Ballarat TR and Daylesford & Surrounds had more female visitors, while Werribee, Western Grampians* and Central Highlands TR had more males.

*includes Horsham, Horsham region, Hamilton and Southern Grampians.
Annual household income by visitors

- Nearly 1/5 (18.1%) of domestic overnight visitors to the GSTR refused to provide / did not know their annual household income.
- ‘$150,000+ pa’ (19.1%) was the most common annual household income range.
- ‘$55,000 - $84,999 pa’ (17.1%) was the 2nd most common income range.
- The average annual household income of overnight visitors to GSTR was $104,833.
- Visitors to Western TR ($109,281) had the highest average annual household income, while visitors to Western Grampians ($92,973) had the lowest average annual household income.

Note: average annual household income is based on those who provided an income and is estimated using the midpoint of each income range.

Source: NVS YE Sep 13, TRA
Domestic Daytrips

Daytrips to the Great Southern Touring Route by Australian residents aged 15 and over.

PLEASE NOTE:
The data used is subject to sampling variability. Users are advised to consult data confidence tables contained in publications relevant to the NVS or otherwise available from the TRA before drawing any conclusions or inferences, or taking any action, based on the data.

Some results may be below the data confidence intervals used by Tourism Victoria, i.e. 200,000 for daytrips. Any such estimates are for INTERNAL USE ONLY.
Domestic daytrip travel

- The GSTR received nearly 8.2 million domestic daytrip visitors - down by 10.3% on YE Sep 12 and by 7.1% on YE Sep 09.
- Over 3/10 (30.5%) of visitors to regional Victoria visited the GSTR - down by 1.1% pts on YE Sep 12 and by 5.8% pts on YE Sep 09.

Source: NVS YE Sep 13, TRA
Average annual growth for selected destinations

Over the period, the GSTR had an average annual decline of 1.8% in domestic daytrip visitors.

While the GSTR had a decline, Australia, Victoria, regional Victoria and Melbourne tourism region experienced growth.

Source: NVS YE Sep 13, TRA
## By area and tourism region

### Domestic daytrip visitors ('000)

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>Share of GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>514</td>
<td>446</td>
<td>431</td>
<td>495</td>
<td>546</td>
<td>10.3%</td>
<td>6.2%</td>
<td>1.5%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>3,081</td>
<td>2,884</td>
<td>3,084</td>
<td>2,865</td>
<td>2,757</td>
<td>-3.8%</td>
<td>-10.5%</td>
<td>-2.7%</td>
<td>33.7%</td>
</tr>
<tr>
<td>Western TR</td>
<td>2,381</td>
<td>2,330</td>
<td>2,423</td>
<td>2,722</td>
<td>2,088</td>
<td>-23.3%</td>
<td>-12.3%</td>
<td>-3.2%</td>
<td>25.5%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>294</td>
<td>449</td>
<td>252</td>
<td>336</td>
<td>347</td>
<td>3.3%</td>
<td>18.0%</td>
<td>4.2%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>239</td>
<td>270</td>
<td>336</td>
<td>497</td>
<td>293</td>
<td>-41.0%</td>
<td>22.6%</td>
<td>5.2%</td>
<td>3.6%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>1,664</td>
<td>1,583</td>
<td>1,385</td>
<td>1,529</td>
<td>1,511</td>
<td>-1.2%</td>
<td>-9.2%</td>
<td>-2.4%</td>
<td>18.5%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>630</td>
<td>753</td>
<td>731</td>
<td>667</td>
<td>632</td>
<td>-5.2%</td>
<td>0.3%</td>
<td>0.1%</td>
<td>7.7%</td>
</tr>
<tr>
<td>GSTR</td>
<td>8,803</td>
<td>8,715</td>
<td>8,642</td>
<td>9,111</td>
<td>8,174</td>
<td>-10.3%</td>
<td>-7.1%</td>
<td>-1.8%</td>
<td></td>
</tr>
</tbody>
</table>

* includes Horsham, Horsham region, Hamilton and Southern Grampians

### In YE Sep 13

- **Compared to YE Sep 12:** Werribee (10.3%) had the largest increase in visitors, while Central Highlands TR (-41.0%) had the largest decrease.
- **Geelong TR (33.7%)** contributed more visitors to the GSTR than any other tourism region or area, while Central Highlands TR (3.6%) contributed the least.

Source: NVS YE Sep 13, TRA
Main purpose of visit

- **Holiday or leisure** (48.3%) was the most popular purpose of visit for domestic daytrip visitors to the GSTR.
- It was also the most popular to Werribee, Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.
- **Visit friends and relatives** (31.7%) was the 2nd most popular purpose of visit.
- It was the most popular to Ballarat TR.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
### Origin

#### Domestic daytrip visitors ('000)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Source market</th>
<th>YE Sep 09</th>
<th>YE Sep 10</th>
<th>YE Sep 11</th>
<th>YE Sep 12</th>
<th>YE Sep 13</th>
<th>Change on last year</th>
<th>Overall change</th>
<th>Ave annual growth</th>
<th>% contribution to GSTR</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Melbourne TR</td>
<td>4,597</td>
<td>4,514</td>
<td>4,457</td>
<td>4,504</td>
<td>3,980</td>
<td>-11.6%</td>
<td>-13.4%</td>
<td>-3.5%</td>
<td>48.7%</td>
</tr>
<tr>
<td>2</td>
<td>Western TR</td>
<td>1,117</td>
<td>1,014</td>
<td>1,124</td>
<td>1,265</td>
<td>1,047</td>
<td>-17.2%</td>
<td>-6.3%</td>
<td>-1.6%</td>
<td>12.8%</td>
</tr>
<tr>
<td>3</td>
<td>Geelong TR</td>
<td>1,015</td>
<td>894</td>
<td>882</td>
<td>709</td>
<td>788</td>
<td>11.1%</td>
<td>-22.4%</td>
<td>-6.1%</td>
<td>9.6%</td>
</tr>
<tr>
<td>4</td>
<td>Ballarat TR</td>
<td>331</td>
<td>427</td>
<td>427</td>
<td>458</td>
<td>375</td>
<td>-17.5%</td>
<td>14.2%</td>
<td>3.4%</td>
<td>4.6%</td>
</tr>
<tr>
<td>5</td>
<td>Macedon TR</td>
<td>243</td>
<td>189</td>
<td>251</td>
<td>260</td>
<td>312</td>
<td>20.0%</td>
<td>28.4%</td>
<td>6.4%</td>
<td>3.8%</td>
</tr>
<tr>
<td>6</td>
<td>Bendigo Loddon TR</td>
<td>193</td>
<td>358</td>
<td>244</td>
<td>264</td>
<td>305</td>
<td>15.5%</td>
<td>58.0%</td>
<td>12.1%</td>
<td>3.7%</td>
</tr>
<tr>
<td>7</td>
<td>Central Highlands TR</td>
<td>220</td>
<td>231</td>
<td>234</td>
<td>196</td>
<td>234</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>2.9%</td>
</tr>
<tr>
<td>8</td>
<td>Melbourne East TR</td>
<td>337</td>
<td>201</td>
<td>346</td>
<td>289</td>
<td>227</td>
<td>-21.5%</td>
<td>-32.6%</td>
<td>-9.4%</td>
<td>2.8%</td>
</tr>
<tr>
<td>9</td>
<td>Peninsula TR</td>
<td>209</td>
<td>160</td>
<td>203</td>
<td>211</td>
<td>213</td>
<td>0.9%</td>
<td>1.9%</td>
<td>0.5%</td>
<td>2.6%</td>
</tr>
<tr>
<td>10</td>
<td>Western Grampians TR</td>
<td>166</td>
<td>225</td>
<td>118</td>
<td>338</td>
<td>110</td>
<td>na</td>
<td>-33.7%</td>
<td>-9.8%</td>
<td>1.3%</td>
</tr>
<tr>
<td></td>
<td>Other regional Victoria</td>
<td>310</td>
<td>342</td>
<td>193</td>
<td>478</td>
<td>411</td>
<td>-14.0%</td>
<td>32.6%</td>
<td>7.3%</td>
<td>5.0%</td>
</tr>
<tr>
<td></td>
<td><strong>Total intrastate</strong></td>
<td><strong>8,738</strong></td>
<td><strong>8,553</strong></td>
<td><strong>8,477</strong></td>
<td><strong>8,970</strong></td>
<td><strong>8,007</strong></td>
<td>-10.7%</td>
<td>-8.4%</td>
<td>-2.2%</td>
<td>98.0%</td>
</tr>
<tr>
<td></td>
<td>South Australia</td>
<td>45</td>
<td>147</td>
<td>150</td>
<td>111</td>
<td>117</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>1.4%</td>
</tr>
<tr>
<td></td>
<td>Other interstate</td>
<td>20</td>
<td>16</td>
<td>15</td>
<td>30</td>
<td>50</td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>0.6%</td>
</tr>
<tr>
<td></td>
<td><strong>Total interstate</strong></td>
<td><strong>65</strong></td>
<td><strong>163</strong></td>
<td><strong>165</strong></td>
<td><strong>141</strong></td>
<td><strong>167</strong></td>
<td>na</td>
<td>na</td>
<td>na</td>
<td>2.0%</td>
</tr>
<tr>
<td></td>
<td><strong>Total GSTR</strong></td>
<td><strong>8,803</strong></td>
<td><strong>8,715</strong></td>
<td><strong>8,642</strong></td>
<td><strong>9,111</strong></td>
<td><strong>8,174</strong></td>
<td><strong>-10.3%</strong></td>
<td><strong>-7.1%</strong></td>
<td><strong>-1.8%</strong></td>
<td><strong>98.0%</strong></td>
</tr>
</tbody>
</table>

**Estimates and results in red are considered statistically unreliable and are for INTERNAL USE ONLY**

**Note:** change analysis should not be used on statistically unreliable estimates or results.

---

**In YE Sep 13**

- Nearly ½ (48.7%) of domestic daytrip visitors to the GSTR came from the Melbourne tourism region - down by 11.6% on YE Sep 12 and by 13.4% on YE Sep 09.
- Western tourism region (12.8%) was the 2nd largest individual source - down by 17.2% on YE Sep 12 and by 6.3% on YE Sep 09.
- The GSTR received 98.0% of visitors from Victoria, while 2.0% came from interstate.

Source: NVS YE Sep 13, TRA
Month visiting

- December (10.5%) was the most popular month to visit the GSTR for domestic daytrip visitors.
- It was also the most popular month to visit Geelong TR and Daylesford & Surrounds. March was the most popular to visit Western TR. April was the most popular to Ballarat TR. August was the most popular to Western Grampians* and Central Highlands TR, while November was the most popular to Werribee.
- June (7.2%) was the least popular month.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
Top 5 transport types used

- **Private or company vehicle** (95.7%) was by far the most popular transport type used by domestic daytrip visitors to the GSTR.
- It was also the most popular to all tourism regions and sub-areas.
- **Bus or coach** (1.6%) was the 2nd most popular transport used.

Source: NVS YE Sep 13, TRA
Top 5 activities undertaken

In YE Sep 13

• ‘Eat out at restaurants’ (43.9%) was the most popular activity undertaken by domestic daytrip visitors to the GSTR.

• It was also the most popular in Geelong TR, Western TR, Western Grampians*, Central Highlands TR and Daylesford & Surrounds.

• ‘Visit friends and relatives’ (35.7%) was the 2nd most popular activity.

• It was the most popular in Werribee and Ballarat TR.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.

Source: NVS YE Sep 13, TRA
In YE Sep 13

- ‘65 years and over’ (18.0%) was the largest age group of domestic daytrip visitors to the GSTR.
- ‘35 to 44 years’ (17.8%) was the 2nd largest age group.
- The average age of visitors to GSTR was 46.2 years.
- Visitors to Central Highlands TR (51.1 years) had the highest average age, while visitors to Werribee (41.3 years) had the lowest average age.
## Gender

### % of domestic daytrip visitors

<table>
<thead>
<tr>
<th>LGA / tourism region</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Werribee</td>
<td>54.0%</td>
<td>46.0%</td>
</tr>
<tr>
<td>Geelong TR</td>
<td>50.4%</td>
<td>49.7%</td>
</tr>
<tr>
<td>Western TR</td>
<td>52.8%</td>
<td>47.2%</td>
</tr>
<tr>
<td>Western Grampians*</td>
<td>48.4%</td>
<td>51.6%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>49.1%</td>
<td>50.9%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>52.3%</td>
<td>47.7%</td>
</tr>
<tr>
<td>Daylesford &amp; Surrounds</td>
<td>58.9%</td>
<td>41.1%</td>
</tr>
<tr>
<td>GSTR</td>
<td>52.1%</td>
<td>47.9%</td>
</tr>
</tbody>
</table>

* includes Horsham, Horsham region, Hamilton and Southern Grampians

### In YE Sep 13

- More domestic daytrip visitors to the GSTR were male (52.1%) than female (47.9%).

- *Werribee, Geelong TR, Western TR, Ballarat TR and Daylesford & Surrounds had more male visitors, while Western Grampians* and Central Highlands TR had more females.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Annual household income

In YE Sep 13
- Nearly 1/5 (19.1%) of domestic daytrip visitors to the GSTR refused to provide / did not know their annual household income.
- "$55,000 - $84,999 pa" (18.1%) was the most common annual household income range.
- "$85,000 - $114,999 pa" (16.2%) was the 2nd most common income range.
- The average annual household income of daytrip visitors to GSTR was $96,397.
- Visitors to Central Highlands TR ($109,418) had the highest average annual household income, while visitors to Western Grampians* ($76,903) had the lowest average annual household income.

Note: average annual household income based on those who provided an income and is estimated using the midpoint of each income range.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Tourist Accommodation

Hotels, motels and serviced apartments in the GSTR with 15+ rooms.

PLEASE NOTE:
The results for the GSTR exclude Werribee, Bacchus Marsh Region and Gordon, as no data was provided for these three SA2s and their equivalent SLAs.
The results for the GSTR may include data for West Wimmera. Due to incomplete data for SA2s within the Western Grampians tourism region, the data for the whole tourism region has been used.
The STA does not have a sample component and the data is not subject to sampling variability. However, other inaccuracies collectively referred to as non-sampling error may affect the data.
Establishments and Employed

As at Jun 13

• The GSTR* had 165 hotels, motels and serviced apartments with 15+ rooms – up by 1.2% on Jun 12.

• The Western TR had the most establishments.

• Nearly 1/3 (32.2%) of establishments in regional Victoria was located within the GSTR* - up 0.3% pts on Jun 12.

• There were 2,299 persons employed in the 15+ rooms establishments in the GSTR* - up by 0.8% on Jun 12.

• The Western TR had the most employed persons.

• Over 1/3 (34.7%) of persons employed in regional Victoria worked in the GSTR* - up 1.4% pts on Jun 12.

Note: the results for employed persons as at June 2013 include an imputed value for Spa Country. The ABS did not publish any data for employed persons for Spa Country as at June 2013. The imputed value is the average for the previous seven quarters.

Source: STA Jun qtr 12 and Jun qtr 13, ABS
Rooms and bed spaces

As at June 2012 | As at June 2013
---|---
Rooms | 4,986 | 4,995
Bed spaces | 14,063 | 14,089

As at Jun 13

- There were 4,995 rooms in hotels, motels and serviced apartments with 15+ rooms in the GSTR* - up by 0.2% on Jun 12.
- The Western TR had the most rooms.
- Nearly 1/3 (31.9%) of rooms in regional Victoria was located within the GSTR* - unchanged on Jun 12.
- The GSTR* had 14,089 bed spaces in hotels, motels and serviced apartments with 15+ rooms - up by 0.2% on Jun 12.
- The Western TR had the most bed spaces.
- Over 3/10 (30.6%) of bed spaces in regional Victoria was provided in the GSTR* - up 0.6% pts on Jun 12.

* excludes Werribee, Bacchus Marsh Region and Gordon (Wyndham (C), Moorabool (S) - Ballan and Moorabool (S) - West). May include data for West Wimmera.

Note: the results for rooms and bed spaces as at June 2013 include imputed values for Spa Country. The ABS did not publish any data for rooms and bed spaces for Spa Country as at June 2013. The imputed values are the average for the previous seven quarters.

Source: STA Jun qtr 12 and Jun qtr 13, ABS
In the month of Jun 13

- The occupancy rate was 37.6% in hotels, motels and serviced apartments with 15+ rooms in the GSTR* - down by 3.7% pts on the month of Jun 12.
- Ballarat TR had the highest occupancy rate.
- Over the past 13 months, the occupancy rate in the GSTR* peaked in Jan 13 (60.3%) and was lowest in Jun 13 (37.6%).
- The GSTR’s* rate was 3.2% pts lower than the average occupancy rate for regional Victoria (40.8%).

Note: the results for occupancy rates in the months of April, May and June 2013 include imputed values for Spa Country. The ABS did not publish any data for rooms as at June 2013 and occupied rooms for April 2013 for Spa Country. The imputed values are the average for the previous seven quarters.

Source: STA Mar qtr 12 to Jun qtr 13, ABS
# Takings from accommodation

### In YE Sep 13

- Hotels, motels and serviced apartments with 15+ room in the GSTR* received $121.8 million in takings - down by 1.6% on YE Sep 12.
- **The Western TR received the most in takings.**
- Over 1/3 (34.2%) of takings from tourist accommodation in regional Victoria was received by establishments in the GSTR*.

### Takings from accommodation ($ million) (’000)

<table>
<thead>
<tr>
<th>Area / tourism region</th>
<th>YE June 2012</th>
<th>YE June 2013</th>
<th>Change on last year</th>
<th>Share of GSTR²</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geelong TR</td>
<td>$27.5</td>
<td>$26.4</td>
<td>-3.9%</td>
<td>21.7%</td>
</tr>
<tr>
<td>Western TR</td>
<td>$50.0</td>
<td>$47.7</td>
<td>-4.7%</td>
<td>39.1%</td>
</tr>
<tr>
<td>Western Grampians¹</td>
<td>$10.7</td>
<td>$10.3</td>
<td>-3.2%</td>
<td>8.5%</td>
</tr>
<tr>
<td>Central Highlands TR</td>
<td>$4.8</td>
<td>$5.1</td>
<td>4.9%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Ballarat TR</td>
<td>$20.1</td>
<td>$21.5</td>
<td>7.2%</td>
<td>17.7%</td>
</tr>
<tr>
<td>Spa Country TR</td>
<td>$10.6</td>
<td>$10.8</td>
<td>1.6%</td>
<td>8.9%</td>
</tr>
<tr>
<td><strong>GSTR²</strong></td>
<td><strong>$123.7</strong></td>
<td><strong>$121.8</strong></td>
<td>-1.6%</td>
<td></td>
</tr>
</tbody>
</table>

¹ may include data for West Wimmera

² excludes Werribee, Bacchus Marsh Region and Gordon (Wyndham (C), Moorabool (S) - Ballan and Moorabool (S) - West). May include data for West Wimmera.

* excludes Werribee, Bacchus Marsh Region and Gordon (Wyndham (C), Moorabool (S) - Ballan and Moorabool (S) - West). May include data for West Wimmera.

Note: the results for takings in YE Jun 13 include an imputed value for Spa Country. The ABS did not publish any data for takings for Spa Country for April 2013. The imputed value is the average for the previous seven quarters.

Source: STA Sep qtr 11 to Jun qtr 13, ABS
Notes - IVS and NVS data (1 of 5)

Definitions –

- **International overnight visitor** = an international resident, aged 15 and over, who visited Australia (for a period of no more than 12 months) and stayed at least one night in the ‘destination’.
- **Domestic overnight trip** = a trip involving a stay away from home for at least one night (but for no more than 12 months), at a place (in Australia) at least 40km from home.
- **Domestic overnight visitor** = an Australian resident, aged 15 and over, who had taken a domestic overnight trip.
- **Domestic daytrip** = a round trip for a distance of at least 50km, of a duration of at least 4 hours but not involving a night away from home (same day travel as part of overnight travel is excluded, as is routine travel such as commuting between work/school and home).
- **Domestic daytrip visitor** = an Australian resident, aged 15 and over, who had taken a domestic daytrip.
- **GSTR** = the combined area of Werribee; Geelong TR; Western TR; Western Grampians*; Central Highlands TR; Ballarat TR; and Daylesford & Surounds.
- **Werribee** = the SA2s of Werribee and Werribee South.
- **Geelong TR** = the SA2s of Belmont, Clifton Springs, Corio - Norlane, Geelong, Geelong West - Hamlyn Heights, Grovedale, Highton, Lara, Leopold, Newcomb - Moolap, Newtown, North Geelong - Bell Park, Ocean Grove - Barwon Heads, Portarlington, Queenscliff, and Geelong Region nfd.
- **Western Grampians*** = the SA2s of Horsham, Horsham Region, Hamilton, and Southern Grampians.
- **Central Highlands TR** = the SA2s of Avoca, Beaufort, Ararat, Ararat Region, St Arnaud, Stawell, and Central Highlands Region nfd.
Definitions (continued) –
- **Ballarat TR** = the SA2s of Alfredton, Ballarat, Ballarat – North, Ballarat – South, Buninyong, Delacombe, Wendouree - Miners Rest, and Ballarat Region ndf.
- **Daylesford & Surrounds** = the SA2s of Creswick – Clunes, Daylesford, Spa Country Region ndf, Bacchus Marsh Region, and Gordon.
- **Melbourne TR** = the Melbourne tourism region (*TRA regional classification*).
- **Regional Victoria** = all tourism regions in Victoria, excl Melbourne TR, ‘in transit’ and ‘don’t know where in Victoria’.

Derived visitor expenditure –
- TRA produces modelled estimates of visitor expenditure in Australia’s tourism regions. There are three separate visitor expenditure estimates: international travel, domestic overnight, and domestic daytrip.
- While there are no collected or modelled expenditure estimates below the tourism region level, derived expenditure estimates can be produced for parts of a tourism region. The most common and widely used method is based on the assumption that the per night expenditure (or per visitor for daytrips) in each sub-area of a tourism region is the same as for the whole tourism region, i.e. sub-area expenditure = per night expenditure in the tourism region * number of nights in the sub-area (note: daytrip expenditure is based on visitors).
- **Total GSTR expenditure** = the sum of published expenditure in all relevant tourism regions plus total derived expenditure for Werribee, Western Grampians* and Daylesford & Surrounds.

* includes Horsham, Horsham region, Hamilton and Southern Grampians.
Notes - IVS and NVS data (3 of 5)

- **Abbreviations** –
  - **GSTR** = the Great Southern Touring Route region.
  - **IVS** = International Visitor Survey.
  - **NVS** = National Visitor Survey.
  - **TRA** = Tourism Research Australia.
  - **YE** = Year ended.

- **Sampling variability and data confidence intervals -**
  - The IVS and the NVS are sample surveys. The results are subject to sampling variability, and therefore may differ from figures that would have been obtained if a census had been used.
  - Any **IVS** estimates below 5,000 for visitors and 500,000 for nights are for INTERNAL USE ONLY.
  - Any **NVS** estimates below 50,000 for overnight visitors, 500,000 for nights and 200,000 for daytrips are for INTERNAL USE ONLY.
  - Percentage change figures provided in this report do not necessarily represent statistically significant change.
New regional boundaries

From 2012, all IVS, NVS and STA data is based on SA2s in the Australian Statistical Geography Standard.

SA2s do not fully align with the statistical local areas or local government areas used to define the tourism regions and areas within the GSTR. As a result, the boundaries for the GSTR have changed. The new building blocks and changes are:

Werribee (previously Wyndham (C)) -
- Comprises SA2s of Werribee and Werribee South.
- Lost parts of Wyndham (C) – North, Wyndham (C) – South and Wyndham (C) – West.
  Note: the new SA2s making up the old Wyndham (C) included part of Hobson Bay (C) – Altona.

Geelong tourism region –
- Gained part of Surf Coast (S) - East.

Western tourism region –
- Gained part of Southern Grampians (S) - Bal.
- Lost parts of Surf Coast (S) – East, Moyne (S) – North West, Glenelg (S) – North, and Glenelg (S) - Heywood.

Western Grampians*
- Comprises SA2s of Horsham, Horsham Region, Hamilton, and Southern Grampians.
- Gained parts of West Wimmera (S), Yarriambiack (S) – South, Moyne (S) - North-West, Glenelg (S) – North, and Glenelg (S) - Heywood.
- Lost part of Southern Grampians (S) - Bal.
New regional boundaries (cont)

- Central Highlands tourism region -
  - Comprises SA2s of Avoca, Beaufort, Ararat, Ararat Region, St Arnaud, Stawell, and Central Highlands Region nfd.
  - Gained parts of Ballarat (C) - Inner North, and Ballarat (C) – North.

- Ballarat tourism region -
  - Comprises SA2s of Alfredton, Ballarat, Ballarat – North, Ballarat – South, Buninyong, Delacombe, Wendouree - Miners Rest, and Ballarat Region nfd.
  - Gained part of Moorabool (S) - West.
  - Lost parts of Ballarat (C) - Inner North, Ballarat (C) – North, and Ballarat (C) - South.

- Daylesford & Surrounds –
  - Comprises SA2s of Creswick – Clunes, Daylesford, Spa Country Region nfd, Bacchus Marsh Region, and Gordon.
  - Gained parts of Moorabool (S) – Bacchus March, Ballarat (C) - Inner North, Ballarat (C) – North, and Ballarat (C) - South.
  - Lost part of Moorabool (S) - West.

  *Note: the new SA2s of Bacchus Marsh Region and Gordon cover most of old Moorabool (S) - Ballan and most of Moorabool (S) - West.*

To ensure consistency of data over time, all IVS and NVS data back to 1999 has been converted to the new boundaries. This means the IVS and NVS time series data in this report can be used for trend analysis and comparative purposes.

However, due to these changes, the results in this report are not fully comparable with results from the previous report ‘Travel and Travellers to the Great Southern Touring Route, Year Ended September 2011’.
Notes - STA data

Definitions -

- **GSTR** = the combined area of Geelong tourism region; Western tourism region; Western Grampians tourism region; Central Highlands tourism region; Ballarat tourism region; and Spa Country tourism region.
- **Room occupancy rate** = occupied room nights in hotels, motels and serviced apartments divided by available room nights for the period.
- **Regional Victoria** = all tourism regions in Victoria, excl Melbourne TR.

Data quality -

- The STA does not have a sample component and the data are not subject to sampling variability. However, other inaccuracies collectively referred to as non-sampling error may affect the data. These non-sampling errors may arise from a number of sources, including:
  - errors in the reporting of data by providers;
  - errors in the process of capturing data;
  - imputation for missing data;
  - definition and classification errors; and
  - incomplete coverage.
- Percentage change figures provided in this report do not necessarily represent statistically significant change.
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