

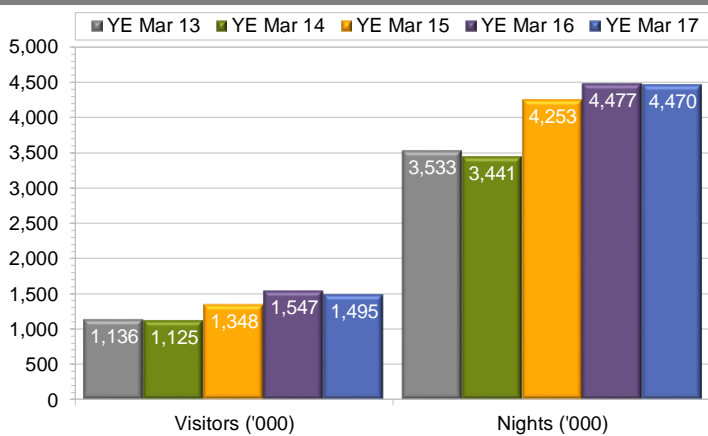
Travel to High Country#

For the period April 2016 to March 2017



Domestic Overnight Travel⁽¹⁾

Visitors and nights

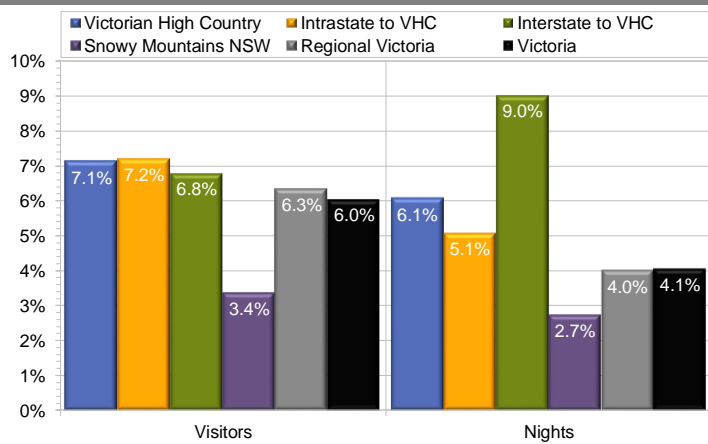


High Country received almost 1.5 million domestic overnight visitors - down by 3.3% on YE Mar 16. Visitors spent nearly 4.5 million nights in the region - down by 0.2% on YE Mar 16.

Market share

The region received 10.3% of visitors and 10.9% of nights in regional Victoria. Compared to YE Mar 16, the share of visitors was down by 0.9% pts and the share of nights was down by 0.3% pts.

Average annual growth – YE Mar 13 to YE Mar 17



Over the period YE Mar 13 to YE Mar 17, High Country had an average annual growth of 7.1% in domestic **visitors**. High Country had a higher growth than Snowy Mountains NSW, regional Victoria and Victoria.

High Country had an average annual growth of 6.1% in domestic visitor **nights** over the period. High Country had a higher growth than Snowy Mountains NSW, regional Victoria and Victoria.

Ski vs non-ski visitors

Ski visitors to the region had a decline while non-ski visitors grew on YE Mar 16 (-19.0% vs +1.0%). **Ski** visitors had a lower growth than non-ski visitors on YE Mar 13 (+11.1% vs +37.2%).

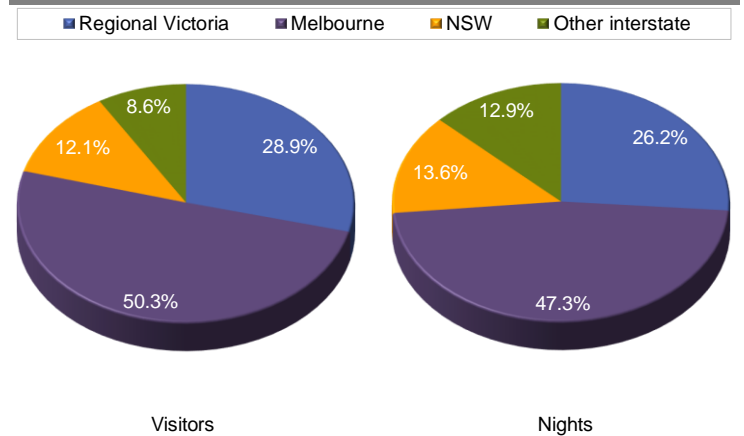
Accommodation

'Friends or relatives property' (28.0%) was the most popular accommodation type used for nights in the region. 'Caravan park or commercial camping ground' (13.9%) was the 2nd most popular, followed by 'standard hotel or motor inn, below 4 star' (13.5%) and 'rented house, apartment, flat or unit' (13.1%).

High Country is composed of: Alpine (S); Benalla (RC); Indigo (S); Mansfield (S); Strathbogie (S); Towong (S); Wangaratta (RC); and alpine resorts.

(1) Source: National Visitor Survey, YE Mar 17, Tourism Research Australia (TRA)

Origin



The region received 79.3% of visitors and 73.5% of nights from **intrastate**. Compared to YE Mar 16, intrastate visitors were down by 3.4% and nights were down by 7.1%.

Interstate contributed 20.7% of visitors and 26.5% of nights in the region. Compared to YE Mar 16, interstate visitors were down by 2.9% and nights were up by 25.9%.

Purpose of visit to High Country

'Holiday' (64.6%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives' (25.7%) and 'business' (6.1%).

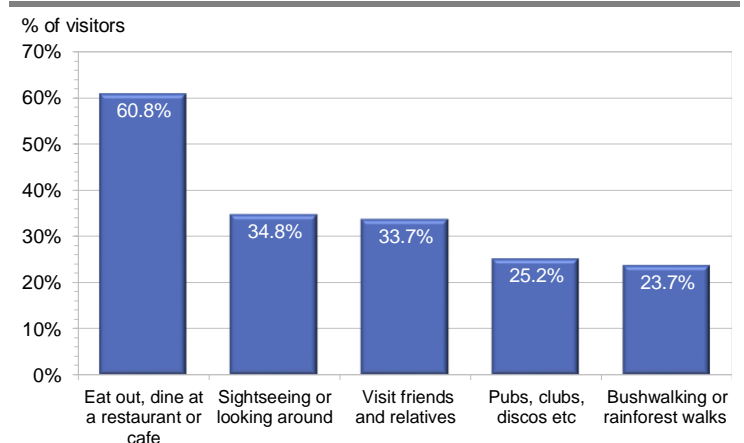
Length of stay

Visitors stayed on average 3 nights in the region – up by 0.1 night on the YE Mar 16.

Age

'45 to 54 years' (23.3%) was the biggest age group of visitors to the region, followed by '65 years and over' (18.1%).

Activities



'Eat out, dine at a restaurant or cafe' (60.8%) was the most popular activity undertaken by visitors to the region.

Expenditure (incl airfares and transport costs) ⁽²⁾

Domestic overnight visitors spent \$645 million in the region - up by 0.9% on YE Mar 16. On average, visitors spent \$144 per night in the region - up by 1.0% on YE Mar 16.

(2) Source: TRA's expenditure allocation method applied to NVS data for YE Mar 17.

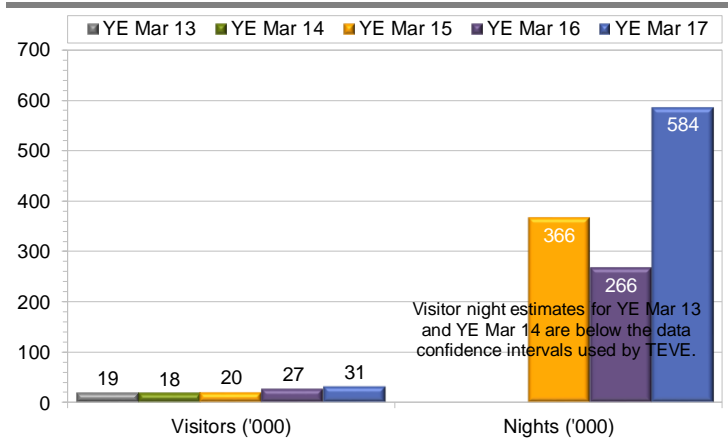
Travel to High Country#

For the period April 2016 to March 2017



International Overnight Travel⁽³⁾

Visitors and nights



High Country received 31,400 international overnight visitors - up by 14.9% on YE Mar 16. Visitors stayed for 584,400 nights in the region - up by 119% on YE Mar 16.

Market share

The region received 6.0% of visitors and 7.3% of nights in regional Victoria. Compared to YE Mar 16, the share of visitors was up by 0.2% pts and the share of nights was up by 3.3% pts.

Purpose of visit to High Country

'Holiday' (70.1%) was the largest purpose for visitors to the region, followed by 'visiting friends and relatives' (18.0%) and 'employment' (6.6%).

Origin

Rank	Market	Share	Rank	Market	Share
1	United Kingdom	15.1%	13	Italy	2.5%
2	New Zealand	12.9%	14	Scandinavia	2.1%
3	USA	10.6%	15	India	1.6%
4	Germany	7.9%	16	France	1.0%
5	Mainland China	6.2%	17	South Korea	0.8%
6	Netherlands	5.1%	18	Taiwan	0.8%
7	Canada	4.6%	19	Japan	0.8%
8	Indonesia	3.6%	20	Switzerland	0.7%
9	Malaysia	2.9%			
10	Hong Kong	2.7%		Other Asia	1.4%
11	Thailand	2.7%		Other Europe	7.6%
12	Singapore	2.6%		Other Countries	3.8%

The UK (15.1%) was the region's largest source market of visitors, followed by New Zealand (12.9%) and the USA (10.6%).

Accommodation

'Rented house, apartment, flat or unit' (34.8%) was the most popular accommodation type used for international nights in the region, followed by 'friends or relatives property' (23.4%).

Age

'55 to 64 years' (24.2%) was the biggest age group of visitors to the region, followed by '25 to 34 years' (21.4%) and '15 to 24 years' (18.2%).

Expenditure (incl pre-paid package expenditure) ⁽⁴⁾

International overnight visitors spent \$30 million in the region - up by 125% on YE Mar 16. On average, visitors spent \$51 per night in the region - up by 2.7% on YE Mar 16.

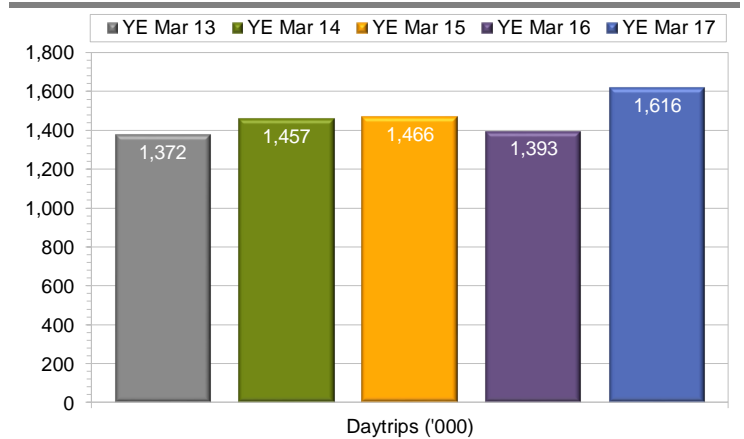
(4) Source: TRA's expenditure allocation method applied to IVS data for YE Mar 17.

Note: Percentage change figures provided in this report do not necessarily represent statistically significant change.

(3) Source: International Visitor Survey, YE Mar 17, TRA

Domestic Daytrip Travel⁽⁵⁾

Trips



High Country received over 1.6 million domestic daytrip visitors - up by 16.0% on YE Mar 16.

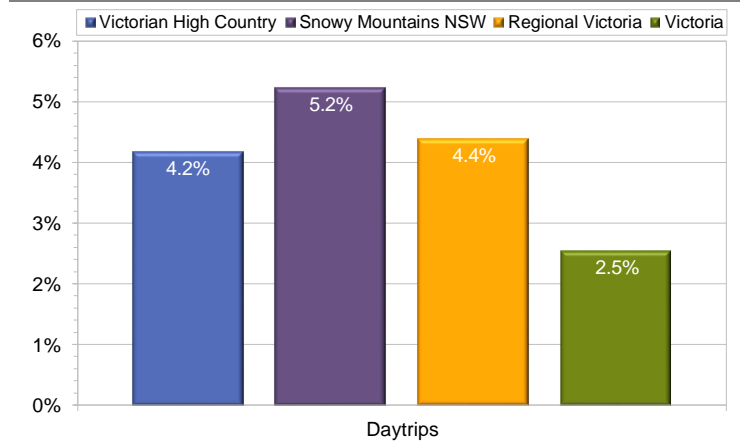
Market share

The region received 4.9% of daytrips to regional Victoria. Compared to YE Mar 16, the share was up by 0.3% pts.

Main purpose of trip

'Holiday' (60.7%) was the largest purpose for visitors to the region the region, followed by 'visiting friends and relatives' (21.8%) and 'business' (7.9%).

Average annual growth – YE Mar 13 to YE Mar 17



Over the period YE Mar 13 to YE Mar 17, the High Country had an average annual growth of 4.2% in domestic daytrips.

High Country had a higher growth than Victoria, but lower than Snowy Mountains NSW and regional Victoria.

Ski vs non-ski visitors

Ski visitors to the region had a decline while non-ski visitors grew (-16.5% vs +22.1% respectively on YE Mar 16) and (-23.0% vs +26.4% respectively on YE Mar 13).

Expenditure ⁽⁶⁾

Domestic daytrip visitors spent \$154 million in the region - up by 35.7% on YE Mar 16. On average, visitors spent \$95 per trip to the region - up by 16.9% on YE Mar 16.

(6) Source: TRA's expenditure allocation method applied to NVS data for YE Mar 17.

(5) Source: National Visitor Survey, YE Mar 17, TRA