

This fact sheet provides a summary of the latest tourism data for the Cultural Tourism segment. Information includes: domestic and international visitor numbers, and visitor profiles such as origin, purpose of visit, travel party and accommodation used.

DOMESTIC & INTERNATIONAL VISITATION FOR VISITORS PARTICIPATING IN CULTURAL TOURISM ACTIVITIES

Cultural visitors are defined as those who attended a theatre performance, a concert or other performing arts, a cultural festival, fair or event; or an Aboriginal performance and/or visited a museum, art gallery, art or craft workshop, an Aboriginal site or community; or a history or heritage site while on their trip to Australia.

Year Ending December 2009	Victoria	Australia
Domestic		
Overnight Visitors (000s)	2,235	9,292
Visitor Nights (000s)	8,173	50,996
Daytrip Visitors (000s)	2,848	9,458
International		
Overnight Visitors (000s)	938	2,653
Nights (000s)	25,158	119,938

NA: Figure is unreliable and unable to be published.

NB: International cultural tourism visitors to Victoria as defined above, did not indicate in which state the activities were undertaken while on their trip to Australia. Figure will differ from trend data below.

International Visitation

2.7 million international cultural tourism visitors travelled to Australia in the year ending December 2009, accounting for 119.9 million nights. Of these visitors, 35% visited Victoria during this period.

938,000 cultural tourism visitors to Australia travelled to Victoria on their trip in the year ending December 2009, accounting for 25.2 million nights. Cultural tourism visitors represent 61% of all international visitors to the State.

Average length of stay for Cultural tourism visitors to Australia was 45.2 nights, compared to an average length of stay of 26.8 nights for Cultural tourism visitors to Victoria.

Cultural Participation in Victoria

The table below examines cultural tourism visitors who participated in that activity while visiting Victoria during their trip.

	Year ending December		% change 08/09
	2008	2009	
International Visitors (000s)			
Victoria	515	507	
Australia	2,699	2,653	-1.7%
Vic's Mkt Share	19.1%	19.1%	
International Visitor Nights (000s)			
Victoria	16,758	17,516	
Australia	114,749	119,938	4.5%
Vic's Mkt Share	14.6%	14.6%	

* Due to survey limitations, Victorian visitors and nights is an estimate based on the segment trend at the national level and applied to the Victorian result using the most recent 3 years of data.

Average Annual Growth

In 2009, approximately 507,000 visitors to Victoria participated in a local cultural experience while in the state. These visitors accounted for an estimated 17.5 million nights to Victoria in the period.

Compared to 2008, International cultural tourism visitors to Australia decreased by 1.7% for visitors, although it increased by 4.5% for visitor nights over the same period.

Victoria's market share of International cultural tourism visitors is estimated to be 19.1% in the year 2009.

Domestic Overnight Visitation

Australia received 9.3 million domestic overnight cultural visitors for the year ending December 2009, accounting for 51.0 million domestic visitor nights. The average length of stay was 5.5 nights.

During the same period Victoria received 2.2 million domestic overnight cultural visitors, accounting for over 8.2 million visitor nights. The average length of stay for cultural visitors to Victoria was 3.7 nights.

	Year ending December					AAG* 99-09	% change 08/09
	1999	2006	2007	2008	2009		
Domestic Visitors (000s)							
Victoria	2,457	2,268	2,629	2,480	2,235	-0.9%	-9.9%
Australia	9,388	9,809	10,901	9,667	9,292	-0.1%	-3.9%
Vic's Mkt Share	26.2%	23.1%	24.1%	25.7%	24.1%		
Domestic Visitor Nights (000s)							
Victoria	9,617	7,810	9,300	9,178	8,173	-1.6%	-11.0%
Australia	60,654	57,632	62,090	54,071	50,996	-1.7%	-5.7%
Vic's Mkt Share	15.9%	13.6%	15.0%	17.0%	16.0%		
Domestic Daytrips (000s)							
Victoria	3,868	2,306	2,731	2,418	2,848	-3.0%	17.8%
Australia	11,441	9,114	10,439	8,514	9,458	-1.9%	11.1%
Vic's Mkt Share	33.8%	25.3%	26.2%	28.4%	30.1%		

* Average Annual Growth

Compared to the previous year, Victoria experienced a decrease in domestic cultural visitors (-9.9%) and visitor nights (-11.0%). Australia also saw a decrease in domestic visitors (-3.9%) and visitor nights (-5.7%) over this period.

Since 1999, there was an average annual decrease of 0.9% for domestic cultural visitors to Victoria (compared to a decline of 0.1% for Australia) and a decrease of 1.6% for visitor nights spent by these visitors in the State (compared to a decline of 1.7% for Australia).

Victoria's market share of the domestic culture visitors has decreased by 2.1 percentage points since 1999, to 24.1% in 2009. Over this period the market share of the nights spent by this segment in Victoria increased by 0.1 percentage points to 16.0%.

Domestic Daytrip Visitation

There were 9.5 million daytrips undertaken by domestic cultural visitors in Australia for the year ending December 2009. The cultural segment had a 5.8% market share of all domestic daytrips in Australia.

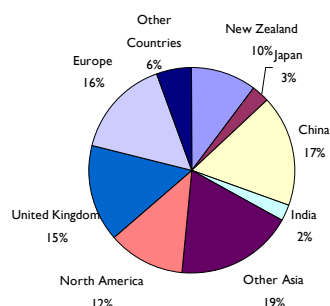
In Victoria, there were 2.8 million daytrips undertaken by domestic cultural visitors, with the segment accounting for 6.8% of all domestic daytrips in Victoria.

Domestic cultural daytrips in Victoria increased by 17.8% from 2008 to 2009.

PROFILE OF INTERNATIONAL CULTURAL VISITORS

The analysis following examines those who are cultural tourism visitors who participated in that activity while visiting Victoria. Due to survey limitations, data for Victoria is based on three years of data to December 2009.

Origin of Cultural Visitors to Victoria



The largest single source market of cultural tourism visitors to Victoria was Asia (excluding Japan, China and India) with 19% or an estimated 27,700 visitors in 2009. Other significant markets include China (est. 32,300), Europe (est. 25,400) and the United Kingdom (est. 21,600).

Age Group (% of International Cultural Visitors)

International cultural visitors to Victoria were most likely to be aged between 25-44 years (40%) or 45-64 years (34%).

Age Group	Visitors to Victoria	Visitors to Australia	Total Travellers
15 - 24 years	17%	20%	17%
25 - 44 years	40%	39%	41%
45 - 64 years	34%	33%	34%
65 years or over	8%	8%	8%

TRAVEL BEHAVIOUR OF INTERNATIONAL CULTURAL TO VICTORIA

Purpose of Visit (% of International Cultural Visitors)

55% of cultural visitors to the State were holiday visitors and 22% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
Holiday	55%	55%	46%
Visiting friends or relatives	22%	23%	25%
Business	9%	8%	15%
Education	9%	10%	8%
Employment	2%	2%	2%
Other	2%	2%	4%

Length of Visit (% of International Cultural Visitors)

61% of international cultural visitors to Victoria were on a visit of 1 to 9 nights compared to 34% of cultural visitors to Australia. A further 24% stayed 10 to 39 nights.

Length of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
1-9 nights	61%	34%	35%
10-39 nights	24%	42%	40%
40-99 nights	7%	12%	12%
100-199 nights	5%	7%	7%
200+ nights	4%	6%	6%

Travel Party (% of International Cultural Visitors)

The majority of international cultural visitors to the State travelled alone (49%) or as an adult couple (26%).

Travel Party	Visitors to Victoria	Visitors to Australia	Total Travellers
Travelling Alone	49%	54%	59%
Adult Couple	26%	26%	22%
Family Group - parents and children	8%	9%	9%
Friends or relatives	13%	9%	8%
Business associates	4%	2%	3%

Accommodation (% of International Cultural Nights)

Of all international cultural visitor nights in Victoria for 2009, 41% were spent in a rented house, apartment or flat and 26% were spent in the home of a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia	Total Travellers
Hotel, resort, motel, motor Inn	16%	12%	11%
B&B	1%	1%	1%
Rented house / apartment / unit / flat	41%	38%	37%
Caravan & Camping	1%	3%	4%
Home of friend or relative	26%	23%	23%
Backpacker / hostel	5%	10%	12%
Own property (eg Holiday house)	1%	1%	1%
Other	9%	12%	12%

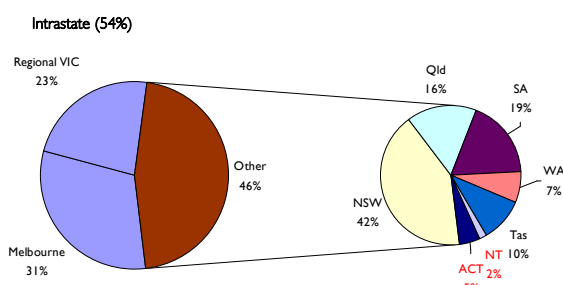
Cultural Activities (% of International Visitors)

66% of international cultural visitors to Victoria visited museums or art galleries, 65% visited historical or heritage buildings and 30% attended theatre concerts or other performing arts.

Activity	Visitors to Victoria	Visitors to Australia
Visit museums or art galleries	66%	57%
Visit history / heritage buildings, sites or monuments	65%	61%
Experience aboriginal art / craft and cultural displays	23%	20%
Attend theatre, concerts or other performing arts	30%	23%
Attend festivals / fairs or cultural events	23%	21%
Visit art / craft workshops / studios	20%	16%
Visit an aboriginal site / community	9%	11%
Attend aboriginal performance	9%	7%

PROFILE OF DOMESTIC CULTURAL VISITORS TO VICTORIA

Domestic Overnight Cultural Visitors to Victoria by Origin



Intrastate and Interstate visitors were relatively even for domestic cultural visitation to Victoria, with Intrastate accounting for 54% of total domestic cultural overnight visitors to the State. Interstate visitors accounted for 46%, primarily driven by New South Wales with 42% of interstate visitors, and a further 16% of interstate visitors coming from Queensland.

Age Group (% of Cultural Visitors)

Domestic overnight cultural visitors to Victoria were most likely to be aged between 45-64 years old (36%) or 25-44 years (34%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	13%	13%
25 - 44 years	34%	33%
45 - 64 years	36%	38%
65 years or over	16%	16%

Lifecycle (% of Cultural Visitors)

Domestic overnight cultural visitors to the State tended to be in the Parent (36%), Older non-working (21%) and Single, no kids (15%) lifecycle segments.

Lifecycle	Victoria	Australia
Single, no kids	15%	16%
Couple, no kids	11%	11%
Parent	36%	35%
Older working	16%	17%
Older non-working	21%	23%

Roy Morgan Value Segments¹ (% of Cultural Visitors)

Cultural visitors to Victoria were more likely to come from the Traditional Family Life (24%), Visible Achievement (20%), and Socially Aware (19%) segments.

Values Segment	Victoria	Australia
Basic Needs	1%	2%
Fairer Deal	2%	1%
Traditional Family Life	24%	22%
Conventional Family Life	10%	10%
'Look At Me'	10%	9%
Something Better	3%	5%
Real Conservatism	4%	4%
Young Optimism	7%	8%
Visible Achievement	20%	20%
Socially Aware	19%	19%

TRAVEL BEHAVIOUR OF DOMESTIC CULTURAL VISITORS TO VICTORIA

Purpose of Visit (% of Cultural Visitors)

69% of cultural visitors to the State were holiday visitors and 22% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday or leisure	69%	67%
Visiting friends and relatives	22%	27%
Business	6%	7%
Other	4%	5%

Length of Visit (% of Cultural Visitors)

60% of domestic overnight cultural visitors to Victoria were on a short visit of 1 to 3 nights. A further 29% stayed 4 to 7 nights, whilst the remaining 12% stayed 8 or more nights.

Length of Trip	Visitors to Victoria	Visitors to Australia
1-3 nights	60%	52%
4-7 nights	29%	29%
8-14 nights	9%	13%
15+ nights	3%	6%

¹ Developed in conjunction with Colin Benjamin of The Horizons Network.

Travel Party (% of Cultural Visitors)

The majority of cultural visitors to the state travelled in an adult couple (34%), with friends or relatives (22%), or as a family group (26%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	14%	15%
Adult Couple	34%	34%
Family Group - parents and children	26%	26%
Friends or relatives	22%	22%
Business associates	1%	1%
Other	2%	2%

Seasonality (% of Cultural Visitors)

Visitation to Victoria peaked during spring and autumn attracting the highest proportion of cultural visitors (27% and 26% of visitors respectively).

Month	Victoria	Australia
December	4%	6%
January	13%	12%
February	6%	6%
Summer	23%	23%
March	10%	9%
April	8%	9%
May	8%	8%
Autumn	26%	26%
June	8%	8%
July	8%	8%
August	8%	8%
Winter	24%	24%
September	9%	9%
October	10%	10%
November	8%	8%
Spring	27%	27%

Accommodation (% of Cultural Nights)

Of all domestic cultural visitor nights in the State, 35% were spent at a hotel, resort, motel or motor inn with a further 33% spent with a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia
Hotel, resort, motel or motor inn	35%	31%
Guest house or B&B	2%	1%
Rented house, apartment, flat or unit	9%	10%
Caravan or camping	14%	20%
Friends or relatives property	33%	32%
Own property (e.g. holiday house)	3%	2%
Other	4%	4%

Cultural Activities (% of Visitors)

42% of Victorian cultural visitors had visited museums or art galleries, 24% had visited an historical or heritage building or monument and 30% had attended theatre, concerts or other performing arts.

Activity	Visitors to Victoria	Visitors to Australia
Visit museums or art galleries	42%	43%
Visit history, heritage buildings sites or monuments	24%	29%
Experience aboriginal art or craft and cultural displays	1%	3%
Attend theatre concerts or other performing arts	30%	23%
Attend festivals or fairs or cultural events	19%	19%
Visit art or craft workshops or studios	5%	6%
Visit an aboriginal site or community	0%	2%

Sources:

- National and International Visitor Surveys, year ending December 2009, Tourism Research Australia
- Holiday Tracking Survey, year ending June 2008, Roy Morgan Research

Definition of cultural tourism:

- International & Domestic - 'Attend theatre, concerts or other performing arts', 'Visit museums or art galleries', 'Visit art or craft workshops or studios', 'Attend festivals, fairs or cultural events', 'Experience aboriginal art or craft and cultural displays' 'Visit an aboriginal site or community', 'Visit history, heritage buildings sites or monuments', and 'Attend aboriginal performance' (International only).

Figures might not add up due to rounding.

Figures in red italics are unreliable and should be used with caution.

Updated by Tourism Victoria June 2010.