

This fact sheet provides a summary of the latest tourism data for the Food and Wine 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 FOOD & WINE TOURISM ACTIVITIES

Food and wine visitors are defined as those who visited a winery and/or dined at a restaurant or café while on their trip to Australia.

Year Ending December 2009	Victoria	Australia
Domestic		
Overnight Visitors (000s)	9,350	39,048
Visitor Nights (000s)	29,336	165,031
Daytrip Visitors (000s)	17,667	64,556
International		
Overnight Visitors (000s)	1,364	4,555
Nights (000s)	34,039	160,185

NA: Figure is unreliable and unable to be published.

NB: International food and wine 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

4.6 million international food and wine tourism visitors travelled to Australia in the year ending December 2009, accounting for 160.2 million nights. Of these visitors, 30% visited Victoria during this period.

1.4 million food and wine tourism visitors to Australia travelled to Victoria on their trip in the year ending December 2009, accounting for 34.0 million nights. Food and wine tourism visitors represent 89% of all international visitors to the State.

Average length of stay for food and wine tourism visitors to Australia was 35.2 nights, compared to an average length of stay of 25.0 nights for food and wine tourism visitors to Victoria.

Food and Wine Participation in Victoria

The table below estimates international food and wine 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	1,055	1,063	
Australia	4,520	4,555	0.8%
Vic's Mkt Share	23.3%	23.3%	
International Visitor Nights (000s)			
Victoria	28,636	30,003	
Australia	152,890	160,185	4.8%
Vic's Mkt Share	18.7%	18.7%	

* Due to survey limitations, estimates of food and wine tourism activity participation in Victoria is based on the rate of participation of a proportion of the overall sample (for 3 years to December 2009) and applied to the estimate of total international visitors to Victoria (year ending December 2009). Segment trends at the national level are applied to this estimate.

In 2009, approximately 1.1 million visitors to Victoria participated in food and wine activities while in the state. These visitors accounted for an estimated 30 million nights to Victoria in the period.

Compared to 2009, International food and wine visitors to Australia have increased marginally (+0.8%).

Victoria's market share of International food and wine tourism visitors is estimated to be 23.3% in the year 2009.

Domestic Overnight Visitation

Australia received 39.0 million domestic overnight food and wine visitors for the year ending December 2009, accounting for 165 million visitor nights. The average length of stay for food and wine visitors to Australia was 4.2 nights.

During the same period Victoria received 9.4 million domestic overnight food and wine visitors, accounting for 29.3 million visitor nights. The average length of stay for food and wine visitors to Victoria was 3.1 nights.

	Year ending December					AAG* 99-09	% change 08/09
	1999	2006	2007	2008	2009		
Domestic Visitors (000s)							
Victoria	6,774	8,970	9,686	9,454	9,350	3.3%	-1.1%
Australia	27,849	38,233	41,225	39,980	39,048	3.4%	-2.3%
Vic's Mkt Share	24.3%	23.5%	23.5%	23.6%	23.9%		
Domestic Visitor Nights (000s)							
Victoria	22,525	28,392	30,960	29,666	29,336	2.7%	-1.1%
Australia	129,891	165,324	177,379	167,723	165,031	2.4%	-1.6%
Vic's Mkt Share	17.3%	17.2%	17.5%	17.7%	17.8%		
Domestic Daytrips (000s)							
Victoria	14,661	13,048	14,902	14,150	17,667	1.9%	24.9%
Australia	48,650	55,157	60,898	56,917	64,556	2.9%	13.4%
Vic's Mkt Share	30.1%	23.7%	24.5%	24.9%	27.4%		

* Average Annual Growth

Between 1999 and 2009, domestic food and wine visitors to Victoria have grown by an average of 3.3% per annum (compared to 3.4% for Australia), while visitor nights have grown by an average rate of 2.7% per annum (compared to 2.4% for Australia).

Domestic Daytrip Visitation

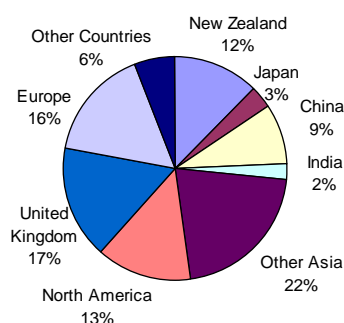
There were 64.6 million daytrips undertaken by domestic food and wine visitors in Australia in the year ending December 2009. The food and wine segment had a 39.9% market share of all domestic daytrips in Australia.

In Victoria, there were 17.7 million daytrips undertaken by domestic food and wine visitors. The food and wine segment accounts for 42.4% of all domestic daytrips in Victoria.

PROFILE OF INTERNATIONAL FOOD AND WINE VISITORS

The analysis following examines those who are food and wine 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 Food and Wine Visitors to Victoria



The largest single source market of food and wine tourism visitors to Victoria was Asia (excluding China, India and Japan) with 22% or an estimated 74,300 visitors in 2009. Other significant markets include the United Kingdom (est. 47,100), Europe (est. 48,600) and North America (est. 39,200).

Age Group (% of International Food and Wine Visitors)

International food and wine visitors to Victoria were most likely to be aged between 25-44 years (40%) or 45-64 years (36%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	15%	17%
25 - 44 years	40%	41%
45 - 64 years	36%	34%
65 years or over	9%	8%

TRAVEL BEHAVIOUR OF INTERNATIONAL FOOD AND WINE VISITORS

Purpose of Visit (% of International Food and Wine Visitors)

49% of International food and wine visitors to the State were holiday visitors, 25% were visiting friends and relatives and 15% visited for business.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday	49%	47%
Visiting friends or relatives	25%	25%
Business	15%	15%
Education	7%	8%
Employment	2%	2%
Other	2%	3%

Length of Visit (% of International Food and Wine Visitors)

61% of international food and wine visitors to Victoria were on a visit of 1 to 9 nights and a further 26% stayed 10 to 39 nights.

Length of Visit	Visitors to Victoria	Visitors to Australia
1-9 nights	61%	44%
10-39 nights	26%	37%
40-99 nights	6%	10%
100-199 nights	4%	6%
200+ nights	3%	4%

Travel Party (% of International Food and Wine Visitors)

The majority of international food and wine visitors to the State travelled alone (52%) or as a couple (26%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	52%	58%
Adult Couple	26%	23%
Family Group - parents and children	9%	9%
Friends or relatives	10%	8%
Business associates	3%	3%

Accommodation (% of International Food and Wine Visitor Nights)

Of all international food and wine visitor nights in Victoria for 2009, 36% were spent in a rented house/apartment or flat and 31% were spent in the home of a friend or relative.

Accommodation	Visitors to Victoria	Visitors to Australia
Hotel, resort, motel, motor Inn	16%	12%
B&B	1%	1%
Rented house / apartment / unit / flat	36%	37%
Caravan & Camping	1%	3%
Home of friend or relative	31%	26%
Backpacker / hostel	6%	9%
Own property (eg Holiday house)	1%	1%
Other	7%	12%

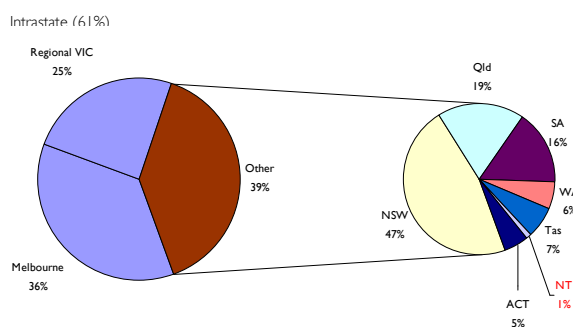
Food and Wine Activities (% of International Visitors)

96% of Victorian international food and wine visitors dined in a restaurant or café and 23% visited wineries.

Activity	Visitors to Victoria	Visitors to Australia
Eat out / dine at a restaurant and/or café	96%	99%
Visit wineries	23%	14%

PROFILE OF DOMESTIC FOOD AND WINE VISITORS TO VICTORIA

Domestic Overnight Food and Wine Visitors to Victoria by Origin



Intrastate visitors were the key market for the food and wine segment, accounting for 61% of total domestic overnight visitors to Victoria. Interstate visitors, accounting for 39% of total domestic visitors, were primarily driven by the New South Wales market (47%), and followed by Queensland (19%) and South Australia (16%).

Age Group (% of Food and Wine Visitors)

Domestic overnight food and wine visitors to Victoria were most likely to be aged between 25-44 years (36%) or 45-64 years old (37%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	14%	13%
25 - 44 years	36%	37%
45 - 64 years	37%	37%
65 years or over	13%	13%

Lifecycle (% of Food and Wine Visitors)

Domestic overnight food and wine visitors to the state tended to be in the Parent (38%), Single, no kids (17%), Older non-working (17%) and Older working (16%) lifecycle segments.

Lifecycle	Victoria	Australia
Single, no kids	17%	16%
Couple, no kids	13%	12%
Parent	38%	39%
Older working	16%	16%
Older non-working	17%	17%

Roy Morgan Value Segments¹ (% of Food and Wine Visitors)

Food and wine visitors to Victoria were more likely to come from the Visible Achievement (26%), Socially Aware (25%) and Traditional Family Life (17%) segments.

Values Segment	Victoria	Australia
Basic Needs	1%	1%
Fairer Deal	1%	1%
Traditional Family Life	17%	17%
Conventional Family Life	12%	13%
"Look At Me"	9%	8%
Something Better	3%	5%
Real Conservatism	3%	4%
Young Optimism	5%	6%
Visible Achievement	26%	24%
Socially Aware	25%	21%

TRAVEL BEHAVIOUR OF DOMESTIC FOOD AND WINE VISITORS TO VICTORIA

Purpose of Visit (% of Food and Wine Visitors)

50% of food and wine visitors to the State were holiday visitors and 29% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday or leisure	50%	50%
Visiting friends and relatives	29%	30%
Business	18%	19%
Other	3%	4%

Length of Visit (% of Food and Wine Visitors)

72% of domestic overnight food and wine visitors to Victoria were on a short visit of 1 to 3 nights. A further 21% stayed 4 to 7 nights, whilst the remaining 7% stayed 8 or more nights.

Length of Trip	Visitors to Victoria	Visitors to Australia
1-3 nights	72%	63%
4-7 nights	21%	25%
8-14 nights	5%	9%
15+ nights	2%	3%

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

Travel Party (% of Food and Wine Visitors)

The majority of food and wine visitors to the State travelled as a couple (31%), alone (23%), in a family group (21%) or with friends or relatives (19%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	23%	23%
Adult Couple	31%	30%
Family Group - parents and children	21%	23%
Friends or relatives	19%	18%
Business associates	5%	6%
Other	1%	1%

Seasonality (% of Food and Wine Visitors)

Food and wine visitation to Victoria was consistent throughout the whole year.

Month	Victoria	Australia
December	6%	7%
January	12%	12%
February	7%	6%
Summer	25%	25%
March	8%	8%
April	8%	8%
May	9%	8%
Autumn	25%	25%
June	8%	8%
July	9%	9%
August	7%	8%
Winter	24%	24%
September	8%	9%
October	8%	9%
November	9%	9%
Spring	25%	27%

Accommodation (% of Food and Wine Nights)

Of all domestic food and wine visitor nights in the State for 2009, 36% were spent at the home of a friend or relative and 33% were spent at a hotel, resort, motel or motor inn.

Accommodation	Visitors to Victoria	Visitors to Australia
Hotel, resort, motel or motor Inn	33%	32%
Guest house or B&B	<i>2%</i>	1%
Rented house, apartment, flat or unit	8%	12%
Caravan or camping	12%	14%
Friends or relatives property	36%	35%
Own property (e.g. holiday house)	5%	-
Other	3%	3%

Food and Wine Activities (% of Visitors)

99% of Victorian food and wine visitors had eaten out at restaurants, whilst only 5% visited a winery.

Activity	Visitors to Victoria	Visitors to Australia
Eat out at restaurants	99%	99%
Visit wineries	5%	6%

Sources:

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

Current definition of Food and Wine Tourism:

- Domestic – 'Visit wineries', 'Eat out at restaurants'
- International – 'Visit wineries', 'Eat out/dine at a restaurant and/or café'

Figures might not add up due to rounding.

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