



This fact sheet provides a summary of the latest tourism data for the Golf 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 GOLF TOURISM ACTIVITIES

Golf visitors are defined as those who played golf while on their trip to Australia

Year Ending December 2009	Victoria	Australia
Domestic		
Overnight Visitors (000s)	390	1,634
Visitor Nights (000s)	1,582	9,395
Daytrip Visitors (000s)	316	1,357
International		
Overnight Visitors (000s)	64	195
Nights (000s)	2,487	11,831

NA: Figure is unreliable and unable to be published

NB: International golf 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

195,000 international golf tourism visitors travelled to Australia in the year ending December 2009, accounting for 11.8 million nights. Of these visitors, 33% visited Victoria during this period.

64,000 golf tourism visitors to Australia travelled to Victoria on their trip in the year ending December 2009, accounting for 2.5 million nights. Golf tourism visitors represent 4% of all international visitors to the State.

Average length of stay for golf tourism visitors to Australia was 60.8 nights, compared to an average length of stay of 39.1 nights for golf tourism visitors to Victoria.

Golf Participation in Victoria

The table below examines golf 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	34	34	
Australia	195	195	-0.4%
Vic's Mkt Share	17.6%	17.6%	
International Visitor Nights (000s)			
Victoria	1,505	1,702	
Australia	10,464	11,831	13.1%
Vic's Mkt Share	14.4%	14.4%	

* 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.

In 2009, approximately 34,000 visitors to Victoria participated in golf while in the state. These visitors accounted for an estimated 1.7 million nights to Victoria in the period.

Compared to 2008, international golf tourism visitors to Australia have decreased by 0.4% for visitors, although they have increased by 13.1% for visitor nights.

Victoria's market share of International golf tourism visitors is estimated to be 17.6% in the year 2009.

Domestic Overnight Visitation

Australia received 1.6 million domestic overnight golf visitors for the year ending December 2009, accounting for 9.4 million visitor nights. The average length of stay was 5.7 nights.

During the same period Victoria received 390,000 domestic overnight golf visitors, accounting for 1.6 million visitor nights. The average length of stay for golf visitors to Victoria was 4.1 nights.

	Year ending December					AAG* 99-09	% change 08/09
	1999	2006	2007	2008	2009		
Domestic Visitors (000s)							
Victoria	775	541	493	426	390	-6.6%	-8.5%
Australia	2,601	2,254	2,007	1,651	1,634	-4.5%	-1.0%
Vic's Mkt Share	29.8%	24.0%	24.6%	25.8%	23.9%		
Domestic Visitor Nights (000s)							
Victoria	3,801	2,195	1,968	1,761	1,582	-8.4%	-10.2%
Australia	15,884	12,996	11,735	9,449	9,395	-5.1%	-0.6%
Vic's Mkt Share	23.9%	16.9%	16.8%	18.6%	16.8%		
Domestic Daytrips (000s)							
Victoria	519	416	467	265	316	-4.8%	19.2%
Australia	1,803	1,576	1,546	1,106	1,357	-2.8%	22.7%
Vic's Mkt Share	28.8%	26.4%	30.2%	24.0%	23.3%		

* Average Annual Growth

Compared to the previous year, Victoria experienced a decrease in domestic golf visitors (-8.5%) and in domestic visitor nights (-10.2%). Australia also saw a decrease in domestic golf visitors (-1.0%) and visitor nights (-0.6%) over this period.

Since 1999, there was an average annual decrease of 6.6% in domestic golf visitors to Victoria (compared to a decline of 4.5% for Australia) and a decrease of 8.4% for visitor nights spent by these visitors in the State (compared to a decline of 5.1% for Australia).

Victoria's market share of domestic golf visitors has decreased by 5.9 percentage points since 1999, to 23.9% in 2009. Over this period the market share of the nights spent by this segment in Victoria decreased by 7.1 percentage points to 16.8%.

Domestic Daytrip Visitation

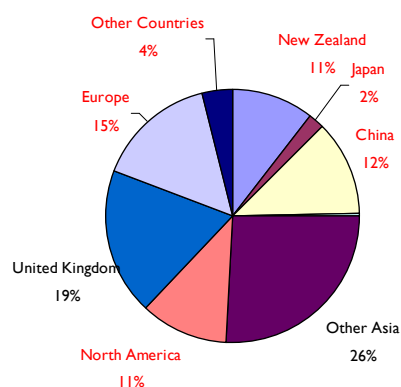
There were 1.4 million daytrips undertaken by domestic golf visitors in Australia for the year ending December 2009. In Victoria, there were 316,000 daytrips undertaken by domestic golf visitors.

Domestic golf daytrips in Victoria increased by 19.2% from 2008 to 2009, compared to an increase of 22.7% in Australia.

PROFILE OF INTERNATIONAL GOLF VISITORS

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

Origin of Golf Visitors to Victoria



The largest single source market of golf tourism visitors to Victoria was Asia (excluding Japan, China and India) comprising of 26% of the market or an estimated 2,800 visitors. Other significant markets include United Kingdom (est. 2,100) and Europe (est. 1,500).

Age Group (% of International Golf Visitors)

International golf visitors to Victoria were most likely to be aged between 45-64 years (36%) or 25-44 years (35%).

Age Group	Visitors to Victoria	Visitors to Australia	Total Travellers
15 - 24 years	20%	22%	17%
25 - 44 years	35%	34%	41%
45 - 64 years	36%	34%	34%
65 years or over	10%	10%	8%

TRAVEL BEHAVIOUR OF INTERNATIONAL GOLF VISITORS

Purpose of Visit (% of International Golf Visitors)

41% of international golf visitors to Victoria were holiday visitors and 29% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
Holiday	41%	46%	46%
Visiting friends or relatives	29%	30%	25%
Business	14%	9%	15%
Education	6%	9%	8%
Employment	9%	4%	2%
Other	0%	1%	4%

Length of Trip (% of International Golf Visitors)

43% of international golf visitors to Victoria were on a trip of 1 to 9 nights and a further 35% stayed 10 to 39 nights.

Length of Visit	Visitors to Victoria	Visitors to Australia	Total Travellers
1-9 nights	43%	20%	35%
10-39 nights	35%	44%	40%
40-99 nights	8%	16%	12%
100-199 nights	10%	12%	7%
200+ nights	4%	8%	6%

Travel Party (% of International Golf Visitors)

The majority of international golf visitors to Victoria travelled alone (66%).

Travel Party	Visitors to Victoria	Visitors to Australia	Total Travellers
Travelling Alone	66%	59%	59%
Adult Couple	15%	27%	22%
Family Group - parents and children	5%	6%	9%
Friends or relatives	11%	6%	8%
Business associates	3%	2%	3%

Accommodation (% of International Golf Nights)

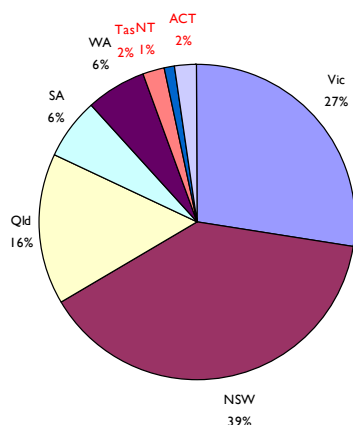
Of all international golf visitor nights in Australia for 2009, 39% were spent in a rented house, apartment or flat and 28% were spent in the home of a friend or relative.

Accommodation	Visitors to Australia	Total Travellers
Hotel, resort, motel, motor Inn	9%	11%
B&B	0%	1%
Rented house / apartment / unit / flat	39%	37%
Caravan & Camping	2%	4%
Home of friend or relative	28%	23%
Backpacker / hostel	8%	12%
Own property (eg Holiday house)	3%	1%
Other	10%	12%

Note: Golf Visitor Nights in Victoria are not reported due to low sample size.

PROFILE OF DOMESTIC GOLF TOURISM VISITORS

Domestic Overnight Golf Visitors by Origin



The key markets of golf visitors in Australia in the year ending December 2009 were NSW (39%) and Victoria (27%).

Age Group (% of Golf Visitors)

Domestic overnight golf visitors to Victoria were most likely to be aged between 45-64 years old (38%) or 25-44 years (33%).

Age Group	Visitors to Victoria	Visitors to Australia
15 - 24 years	10%	10%
25 - 44 years	33%	32%
45 - 64 years	38%	39%
65 years or over	20%	19%

Lifecycle (% of Golf Visitors)

Domestic overnight golf visitors to Victoria tended to be in the Parent (35%) or Older non-working (25%) segments.

Lifecycle	Visitors to Victoria	Visitors to Australia
Single, no kids	13%	12%
Couple, no kids	8%	9%
Parent	35%	37%
Older working	19%	16%
Older non-working	25%	25%

Roy Morgan Value Segments¹ (% of Golf Visitors)

Golf visitors to Victoria were more likely to come from the Visible Achievement (28%), Conventional Family Life (24%) and Traditional Family Life (18%) segments.

Values Segment	Victoria	Australia
Basic Needs	1%	1%
Fairer Deal	3%	1%
Traditional Family Life	18%	17%
Conventional Family Life	24%	17%
'Look At Me'	10%	8%
Something Better	5%	5%
Real Conservatism	4%	4%
Young Optimism	-	2%
Visible Achievement	28%	27%
Socially Aware	8%	18%

TRAVEL BEHAVIOUR OF DOMESTIC GOLF VISITORS

Purpose of Visit (% of Golf Visitors)

70% of golf visitors to the State were holiday visitors and 23% were visiting friends and relatives.

Purpose of Visit	Visitors to Victoria	Visitors to Australia
Holiday or leisure	70%	69%
Visiting friends and relatives	23%	26%
Business	5%	7%
Other	2%	3%

Length of Trip (% of Golf Visitors)

59% of domestic overnight golf visitors to Victoria were on a short trip of 1 to 3 nights. A further 28% stayed 4 to 7 nights, whilst the remaining 13% stayed 8 or more nights.

Length of Trip	Visitors to Victoria	Visitors to Australia
1-3 nights	59%	52%
4-7 nights	28%	29%
8-14 nights	10%	15%
15+ nights	3%	5%

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

Travel Party (% of Golf Visitors)

The composition of travel parties for golf visitors was diverse. The majority of golf visitors to Victoria travelled as a couple (34%), with friends or relatives (24%) or as a family group (23%).

Travel Party	Visitors to Victoria	Visitors to Australia
Travelling Alone	14%	13%
Adult Couple	34%	35%
Family Group - parents and children	23%	25%
Friends or relatives	24%	23%
Business associates	2%	3%
Other	2%	3%

Seasonality (% of Golf Visitors)

Golf visitation to the State peaked during autumn, attracting the highest proportion of golf visitors (33% of visitors) and was strong throughout summer (28%) also. In comparison, visitation during winter was lowest, attracting only 18% of visitors.

Month	Victoria	Australia
December	5%	5%
January	17%	15%
February	6%	4%
Summer	28%	24%
March	10%	10%
April	10%	9%
May	13%	8%
Autumn	33%	27%
June	5%	7%
July	8%	7%
August	5%	8%
Winter	18%	21%
September	6%	9%
October	10%	10%
November	6%	9%
Spring	21%	28%

Accommodation (% of Golf Nights)

Of all domestic golf visitor nights to Australia in the year ending December 2009, 28% were spent with friends or relatives and 28% stayed in a hotel, resort, motel or motor inn.

Accommodation	Visitors to Australia	Total Traveller
Hotel, resort, motel or motor Inn	28%	24%
Guest house or B&B	1%	1%
Rented house, apartment, flat or unit	15%	12%
Caravan or camping	21%	25%
Friends or relatives property	28%	30%
Own property (e.g. holiday house)	6%	4%
Other	2%	3%

Note: Golf Visitor Nights in Victoria are not reported due to low sample size.

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 Golf Tourism:

- Domestic and International – 'Play Golf'

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.