



### Definition

Domestic overnight culinary visitors are defined as domestic overnight visitors who travel for holiday/leisure purposes and one of the reasons for their trip is to experience Australia's food or wine. International culinary visitors are international visitors who state that one of their reasons for visiting Australia is to experience Australia's food, wines and wineries; see the section on definitional issues for more information.

### What is happening to supply?

According to the Australian Bureau of Statistics, in 2001 there were nearly 30 000 restaurants and cafes in Australia listed for GST purposes (Australian Bureau of Statistics, unpublished data) serving 560 million meals a year (Australian Restaurant and Catering Association 2005). In addition there are 1 490 wineries in Australia with cellar door facilities and nearly two fifths of these wineries have an on-site restaurant or facilities to serve light meals (Winetitles wine industry database 2005).

### How many travellers are culinary visitors?

In 2004, there were eight million domestic overnight culinary visitors in Australia. They accounted for 27 per cent of domestic overnight visitors who had taken a trip for holiday/leisure purposes.

While, by definition, all domestic overnight culinary visitors took their trip to experience Australia's food or wine, 27 per cent strongly agreed that this was the case and 73 per cent moderately agreed.

In 2004, 22 725 international visitors visited Australia, among other reasons, to experience Australia's food, wine and wineries.

### Where do they go?

Compared to other states and territories, domestic overnight visitors to Western Australia and Tasmania had the highest propensity to be culinary visitors. Thirty one per cent of domestic overnight holiday/leisure visitors to each of these states were culinary visitors in 2004 (Table 1).

**Table 1 Visitation and propensity of domestic overnight holiday/leisure visitors to be culinary visitors in each state/territory, 2004**

State/Territory	Culinary visitors '000	Proportion of holiday/leisure visitors to the state/territory Per cent
New South Wales	2 659	26
Victoria	2 156	29
Queensland	1 742	24
Western Australia	839	31
South Australia	593	25
Tasmania	291	31
Australia Capital Territory	126	26
Northern Territory	112	23

Compared to other tourism regions, domestic overnight visitors to the Hunter and Australia's South West had the highest propensity to be culinary visitors with 40 per cent of domestic overnight holiday/leisure visitors to each of these regions being culinary visitors in 2004 (Table 2).

**Table 2 Visitation and propensity of domestic overnight holiday/leisure visitors to be culinary visitors in selected regions, 2004**

Tourism Region	Culinary visitors '000	Proportion of holiday/leisure visitors to the region Per cent
Hunter (NSW)	305	40
Australia's South West (WA)	477	40
Capital Country (NSW)	129	38
Mallee (VIC)	123	36
Greater Hobart (TAS)	143	34
Melbourne (VIC)	525	33

In 2004 Queensland was the main stopover state for international culinary visitors to Australia, with 56 per cent of international culinary visitors stopping in this state.

### Where do they come from?

In 2004 a large proportion of domestic overnight culinary visitors were from Sydney and Melbourne, together they accounted for over two fifths of the total domestic overnight culinary visitors. This was a higher proportion than for other domestic overnight holiday/leisure visitors.

The majority (57 per cent) of international culinary visitors were from Europe (including UK and Germany), USA, Canada and New Zealand.

### How much do they spend?

In 2004 domestic overnight culinary visitors spent more on average per visit and per night than other domestic overnight holiday/leisure visitors (Table 3).

In terms of expenditure items, domestic overnight culinary visitors spent more on average (per visit and per night) on accommodation, takeaway and restaurant meals, alcohol/drinks and shopping, than other domestic overnight holiday/leisure visitors.

**Table 3 Expenditure by domestic overnight culinary visitors and other domestic overnight holiday/leisure visitors, 2004**

Expenditure Item	Average expenditure		Average expenditure	
	Per visit Culinary visitors \$	Per visit Other visitors \$	Per night Culinary visitors \$	Per night Other visitors \$
Accommodation (can include food)	213	164	48	36
Airfares	43	41	10	9
Other transport	75	82	17	18
Takeaways, restaurant meals	142	91	32	20
Groceries for self catering	46	46	10	10
Alcohol/drinks	57	32	13	7
Shopping	111	67	25	15
Entertainment, museums, movies	36	35	8	8
Other	67	74	15	16
Total	790	633	179	138

### Why are they travelling?

In 2004 more than nine in ten domestic overnight culinary visitors took their trip to escape and unwind and more than seven in ten took their trip for luxury or indulgence purposes.

### Who are they?

The two main groups of travellers that were culinary visitors in 2004 were young and mid-life couples with no children and older working married persons. The majority of domestic overnight culinary visitors in both groups were working full time and had an annual household income above \$78 000 per annum.

The majority of international culinary visitors were aged between 20 and 44 (51 per cent) and were part of a couple (includes married, de facto and living together)(60 per cent).

### How do they obtain information for their trip?

Information sources used by domestic overnight culinary visitors in 2004 were: previous experience (55 per cent), internet (29 per cent) and friends or relatives (19 per cent). Over half of international culinary visitors used the internet and/or a travel book/guide.

### What transport do they use?

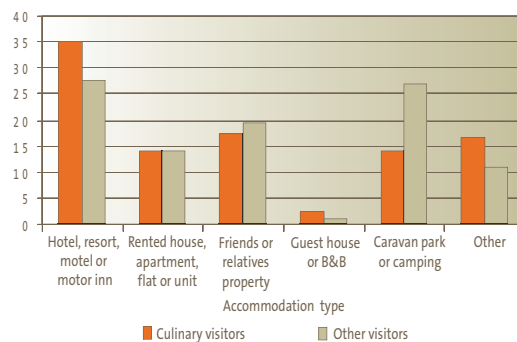
Over four fifths of domestic overnight culinary visitors used a motor vehicle (private, company or rental) and 15 per cent used air transport on their trip in 2004. Fifty five per cent of international culinary visitors used air transport to travel between stopovers on their trip in Australia.

### Where do they stay?

Domestic overnight culinary visitors spent most nights in hotel, resort, motel or motor inn accommodation in 2004 (Figure 1). Domestic overnight culinary visitors were more likely to spend nights in guest houses or B&Bs compared to other domestic overnight holiday/leisure visitors.

Seventy seven per cent of international culinary visitors stayed in hotel, resort, motel or motor inn type of accommodation on their trip in Australia in 2004.

Figure 1 Domestic overnight culinary visitor nights and other holiday/leisure visitor nights, 2004



### How many nights do they spend travelling?

Domestic overnight culinary visitors in all age groups, except the 25 to 34 age group, took shorter overnight trips compared to other domestic overnight holiday/leisure visitors in 2004 (Figure 2).

Figure 2 Average length of trip by age for domestic overnight culinary visitors and other domestic holiday/leisure visitors, 2004



### What else do they do?

Eating out and sightseeing were the most popular activities undertaken by domestic overnight culinary visitors in 2004. Furthermore a higher proportion of domestic overnight culinary visitors ate out at a restaurant or visited a winery compared to other domestic overnight holiday/leisure visitors.

Visiting a winery was the fourth most popular activity for international culinary visitors in Australia behind shopping for pleasure, going to the beach and going to markets. In contrast visiting a winery was the fourteenth most popular activity for international visitors in general.

### Definitional Issues

A number of activity based definitions of a culinary visitor were examined for this snapshot. Heaney (2003) defined a domestic culinary visitor as a domestic day or overnight visitor who nominated eating out or going to a restaurant as a leisure activity they participated in during their trip in Australia. This definition could also be extended to include those visitors who nominated visiting a winery as an activity. It was felt that this definition was too broad and would not capture visitors on a true culinary experience. Eating out to some people includes going to a fast food restaurant.

An activity based definition for international culinary visitors is not an alternative as eating out/going to a restaurant was not an activity choice in the 2004 IVS.

For these reasons, the definitions described in this snapshot were used.

The data included in this snapshot are mainly sourced from Tourism Research Australia's National Visitor Survey and International Visitor Survey, 2004.

Other sources of information included:

Australian Bureau of Statistics 2001, Business Register Data, unpublished data.

Australian Restaurant and Catering Association 2005, (<http://www.restaurantcater.asn.au>). Information retrieved 15 July 2005.

Heaney, L. and Robertson, G. 2004, *The Great Australian Bite: Travel Patterns of Culinary Visitors*, Tourism Research Report, Vol. 5, No. 2, 37-50, Tourism Research Report, Canberra.

Tourism Research Australia, National Visitor Survey and International Visitor Survey, various years, (unpublished data), TRA, Canberra.

Winetitles wine industry database 2004, (<http://www.winetitles.com.au>). Information retrieved 18 January 2005.

Other Information:

Tourism Australia -<http://www.tourism.australia.com>

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Tourism Research Australia, 2005, *Niche Market Snapshot on Culinary Tourism in Australia, August, 2005*, TRA, Canberra. Snapshot prepared by Darrian Collins.

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