

**CULTURAL AND HERITAGE TOURISM IN AUSTRALIA 2007**



Domestic and international visitors participate in a range of activities while travelling in Australia. This snapshot presents a profile of domestic and international visitors who participated in cultural and heritage activities during 2007.

**Definition**

A cultural and heritage visitor is one who participates in at least one of the following tourism activities during their trip:

- Attend theatre, concerts or other performing arts
- Visit museums or art galleries
- Visit art, craft workshops or studios
- Attend festivals, fairs or cultural events
- Experience Aboriginal art, craft and cultural displays
- Visit an Aboriginal site or community
- Visit historical/heritage buildings, sites or monuments

Visitors may also participate in other tourism activities.

**What are the recent visitor trends?**

Australia's cultural and heritage tourism market in 2007 was predominantly comprised of domestic visitors.

In 2007 there were 10.9 million domestic overnight visitors who participated in cultural or heritage activities and 10.4 million domestic day visitors. Since 2006 the number of domestic overnight cultural and heritage visitors has grown by 11% while total domestic overnight visitation remained flat over this same period. Domestic day cultural and heritage visitors increased by 15%.

International cultural and heritage visitors have increased 3% since 2006. This was slightly higher than total international visitors during this period (2%).

**Table 1 Visitor numbers, nights and trip expenditure for cultural and heritage visitors, 2007**

	International		Domestic overnight		Domestic day	
	Number	Share %	Number	Share %	Number	Share %
Visitors ('000)	2 674	51	10 903	15	10 439	7
Nights ('000)	107 117	68	62 194	22	na	na
Expenditure* (\$ million)	9 640	65	10 354	24	1 139	8

Both international (40 nights) and domestic (6 nights) cultural and heritage visitors stay longer than international and domestic non-cultural and heritage visitors (20 nights and 4 nights respectively).

**How much do they spend?**

International and domestic cultural and heritage visitors spent around the same proportion of their total expenditure on accommodation, food and beverages (46% and 48% respectively). International visitors spent more on education while domestic visitors spent more on transport.

International visitors had a higher spend on average per visitor most likely due to a longer average length of stay.

On average, cultural and heritage visitors from Singapore spent the most per visitor and the most per night. Visitors from the USA and New Zealand also had high spend per night.

**Table 2 Expenditure per person by cultural and heritage visitors, 2007**

Expenditure items	International Per person	Domestic overnight Per person
Accommodation, food and beverages	1 655	459
Shopping	470	107
Domestic airfares	86	102
Other transport	308	135
Organised tours	194	20
Education	602	3
Entertainment	96	40
Other	194	84
Total per visitor	3 605	950
<b>Total expenditure (\$ million)</b>	<b>9 640</b>	<b>10 354</b>

**Who are they?**

Domestic overnight cultural and heritage visitors travel as adult couples (36%) or in family groups (21%). Adult couples are more likely to participate in more than one activity than any other travel group, representing 40% of all visitors participating in two or more activities. Domestic overnight visitors aged over 60 years were the most likely to participate in cultural and heritage activities (25%).

Domestic day cultural and heritage visitors were more likely to be parents (32%), older married couples (31%) or aged over 60 years (29%).

European countries such as France (72%), Switzerland (71%) and Germany (70%) were more likely to participate in cultural and heritage activities than other international visitors. Asian visitors were less likely to participate in cultural and heritage activities, with the exception of Taiwan, Korea and China.

**How many activities do they participate in?**

International cultural and heritage visitors participated in more activities than domestic visitors most likely due to the longer average length of stay. On average international visitors participated in 2.1 cultural and heritage activities compared with 1.3 for domestic overnight visitors and 1.1 for domestic day visitors.

**How long do they stay?**

Domestic cultural and heritage visitors stayed around 62 million nights during 2007 which was a 5% increase on 2006. Visitors from the Northern Territory took the longest trips, staying for an average of 8 nights. Visitors from New South Wales and the Australian Capital Territory took the shortest trips staying on average 5 nights.

International cultural and heritage visitors stayed around 107 million nights in Australia which was a 3% increase on 2006. Visitors from Germany (54 nights) and Korea (53 nights) had the longest length of stay while visitors from New Zealand (17 nights) and USA (27 nights) had comparatively short trips.

**Table 3 Expenditure and length of stay by cultural and heritage visitors, 2007**

Country/region	Visitors	Average stay	Expenditure	Expenditure
	%	Nights	per trip \$	per night \$
United Kingdom	16	39	3 528	91
New Zealand	14	17	1 966	114
USA	10	27	3 324	121
China	8	45	4 170	92
Japan	7	37	2 831	77
Korea	6	53	4 493	85
Germany	4	54	4 124	77
Singapore	3	36	5 200	143
Other Europe	12	52	4 490	87
Other Asia	13	52	4 529	88
Other countries	8	47	4 276	91
<b>Total</b>	<b>100</b>	<b>40</b>	<b>3 717</b>	<b>93</b>

### Where do they go?

New South Wales was the most popular State for domestic and international cultural and heritage visitors. This was followed by Victoria for domestic visitors and Queensland for international visitors.

Capital city regions<sup>b</sup> were the most popular among cultural and heritage visitors. Australia's South West in Western Australia and North Coast NSW were also popular among domestic overnight visitors while Tropical North Queensland and Petermann (Uluru), Northern Territory was popular among international visitors.

**Table 4 Visitors by State and Territory, 2007**

	International	Domestic overnight '000	Domestic day
New South Wales	1 739	3 586	3 517
Victoria	910	2 839	2 731
Queensland	1 151	2 118	1 695
South Australia	256	807	855
Western Australia	387	1 113	1 012
Tasmania	124	490	307
Northern Territory	289	392	63
Australian Capital Territory	127	641	258
<b>Total</b>	<b>2 674</b>	<b>10 903</b>	<b>10 439</b>

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**Table 5 Share of cultural and heritage visitors by activity type, 2007**

Type of cultural and heritage tourism activity	International	Domestic overnight	Domestic day
		%	
Attend theatre, concerts or other performing arts	24	21	20
Visit museums or art galleries	57	43	32
Visit art/craft workshops/studios	17	8	9
Attend festivals/fairs or cultural events	17	17	20
Experience Aboriginal art/craft and cultural displays	24	5	2
Visit an Aboriginal site/community	11	3	1
Visit historical/heritage buildings, sites or monuments	62	33	30
<b>Total cultural and heritage visitors (million)</b>	<b>2.7</b>	<b>10.9</b>	<b>10.4</b>
Average number of cultural and heritage activities	2.1	1.3	1.1

### Which activities do they participate in?

The top two cultural and heritage activities for both international and domestic visitors were visiting museums and art galleries, and visiting heritage buildings, sites or monuments.

International visitors were more likely to participate in indigenous experiences such as experiencing aboriginal art/craft or cultural display (24%) or visiting an aboriginal site or community (11%) than domestic overnight (5% and 3%) and domestic day visitors (2% and 1%).

### How do they travel?

During 2007, 24% of international cultural and heritage visitors arrived on a travel package, compared to 19% of non-cultural and heritage visitors.

Domestic visitors who participated in more than one cultural and heritage activity were more likely to be travelling as part of a package tour.

### Where is cultural and heritage tourism headed?

International tourism is forecast to continue to grow by 4.8% per year to reach 8.9 million visitors in 2016. While this growth is positive, the large growth comes from Asian markets such as India and China. Given low participation rates by Asian visitors in cultural and heritage activities this may provide a challenge for future growth.

**Table 6 Visitors on a travel package by country, 2007**

Country/region	Package tour visitors '000	Package tour visitors as a proportion of total cultural and heritage visitors %
Japan	109	61
China	98	47
Korea	70	44
United Kingdom	66	16
USA	63	22
New Zealand	50	13
Taiwan	30	51
Germany	24	24
Other Europe	62	20
Other Asia	50	14
Other countries	27	12
<b>Total</b>	<b>648</b>	<b>24</b>

Domestically, cultural and heritage activities are forecast to increase on average 1.7% per year between 2006 and 2020. This can be attributed to a trend in younger visitors participating in these activities as well as strong growth by Baby Boomers and Generation X participating in cultural and heritage activities.

#### DATA SOURCES

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) 1999-2007 (unpublished data)

#### KEY

na not available

<sup>a</sup> Expenditure is for the whole trip, not only on cultural and heritage activities, and excludes expenditure on international airfares, pre-paid packages and purchase of motor vehicles

<sup>b</sup> Capital city regions include the Gold Coast

## KEY FINDINGS

- 10.9 million domestic overnight visitors and 10.4 million domestic day visitors participated in cultural and heritage activities during 2007.
- On average international visitors participated in 2.1 cultural and heritage activities compared with 1.3 for domestic overnight visitors and 1.1 for domestic day visitors.
- The top two cultural and heritage activities for both international and domestic visitors were visiting museums and art galleries, and visiting heritage buildings, sites or monuments.
- Domestic overnight cultural and heritage visitors travel as adult couples (36%) or in family groups (21%).
- Domestically, cultural and heritage activities are forecast to increase on average 1.7% per year between 2006 and 2020.

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