

# CULTURAL AND HERITAGE TOURISM IN AUSTRALIA 2008

# Snapshot



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 2008.

## Definition

A cultural and heritage visitor 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.

Repeat participation in cultural and heritage activities are not recorded in these surveys. Visitors may also participate in other tourism activities.

## What are the most recent visitor trends?

International cultural and heritage visitors comprised more than half (52%) of all international visitors to Australia in 2008. The number of international visitors participating in cultural and heritage activities in 2008 remained steady, and there has been an average annual growth of 3% in this market since 2000.

In 2008, Australia's cultural and heritage tourism market was predominantly domestic visitors. There were 9.7 million domestic overnight visitors and 8.5 million domestic day visitors who participated in cultural and heritage activities in 2008. Although

**Table 1 Visitor numbers and nights for cultural and heritage visitors, 2000-2008**

	2000	2001	2002	2003	2004	2005	2006	2007	2008	Average annual change
<b>International</b>										
Visitors (millions)	2.2	2.1	2.0	2.0	2.2	2.6	2.6	2.7	2.7	3%
Nights (millions)	75.7	78.8	77.9	78.9	82.3	92.7	103.5	107.1	114.2	5%
<b>Domestic overnight</b>										
Visitors (millions)	7.7	7.8	7.9	9.3	9.3	9.3	9.8	10.9	9.7	3%
Nights (millions)	48.1	46.9	49.7	58.6	56.5	53.9	57.6	62.1	54.1	1%
<b>Domestic Day</b>										
Visitors (millions)	7.9	7.9	8.2	9.6	8.7	9.3	9.1	10.4	8.5	1%

both the domestic overnight and day markets experienced a decline in visitor numbers during 2008, this was in line with the decrease in the total domestic market. Overall, the trend for the domestic overnight and domestic day cultural and heritage markets has been positive with an average annual growth of 3% and 1% respectively since 2000.

## How much do they spend?

International cultural and heritage visitors spent \$17 billion in 2008. On average, international cultural and heritage visitors spent \$6,355 per trip compared to other visitors who spent on average \$4,000. These visitors had a higher spend per trip most likely due to the longer average length of stay of cultural and heritage visitors. Per night spend for cultural and heritage visitors was lower (\$148) than spend by other visitors (\$186).

On average, cultural and heritage visitors from the United States (\$237) and United Kingdom (\$171) spent the most per night. Per trip, visitors from Switzerland (\$8,878) and Scandinavia (\$8,723) spent the most on average.

Domestic overnight cultural and heritage visitors spent \$9.6 billion in 2008. On average, these visitors spent \$178 per night and \$994 per trip. This was higher than those not participating in cultural and heritage activities (\$161 per night and \$576 per trip).

Domestic day cultural and heritage visitors spent \$961 million. This was \$113 per trip for cultural and heritage visitor, compared to \$106 per trip for other visitors.

## Who are they?

European countries such as Switzerland (85%), Germany (73%), Italy (71%), and the Netherlands

**Table 2 Expenditure per person by cultural and heritage visitors, 2008**

Expenditure items	International	Domestic overnight
	\$ Per trip	\$ Per trip
Food, drink & accommodation	1 861	559
Shopping	530	220
Domestic airfares	413	474
Other transport	1 995	203
Organised tours	542	307
Education	8 854	237
Entertainment	195	129
Other	1 631	379
<b>Total spend per person</b>	<b>6 355</b>	<b>994</b>
<b>Total spend per night</b>	<b>148</b>	<b>178</b>

(68%) 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 Korea, Taiwan, China and Thailand.

Domestic overnight cultural and heritage visitors travelled *as an adult couple* (37%) or *as a family group* (22%). Adult couples were more likely to participate in more than one activity than any other travel group, representing 43% of all visitors participating in two or more cultural and heritage activities. Domestic overnight visitors aged between 45 and 64 years were the most likely to participate in cultural and heritage activities (37%).

Domestic day cultural and heritage visitors were most likely to be *parents* (33%), *older non-working* (30%) or aged between 45 and 64 years (33%).

## How many activities do they participate in?

Of all international cultural and heritage visitors, 43% participated in only one cultural and heritage activity. Around one quarter participated in two cultural and heritage activities and 30% participated in three or more of these activities.

Domestic day cultural and heritage visitors predominantly participated in only one of these activities (92%) as did domestic overnight visitors (80%). Twenty per cent of domestic overnight visitors and 8% of domestic day visitors participated in two or more cultural and heritage activities.

## How long do they stay?

International cultural and heritage visitors stayed around 114 million nights in Australia which was a 7% increase on 2007. Visitors from India (72 nights) and Korea (61 nights) had the longest lengths of stay while visitors from New Zealand (20 nights) and the United States (27 nights) had relatively short trips.

Domestic cultural and heritage visitors stayed around 54 million nights during 2008, which was a decrease of 13% on 2007. Visitors from the Northern Territory took the longest trips, staying for an average of 9 nights, while visitors from the Australian Capital Territory took the shortest trips, staying on average 3 nights.

## 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 were the most popular among cultural and heritage visitors. The South Coast and North Coast in New South Wales were also popular among domestic overnight visitors, while Tropical North Queensland and Petermann (Uluru), Northern Territory were popular among international visitors.

**Table 3 Expenditure and length of stay by cultural and heritage visitors, 2008**

Country/region	Visitors %	Average stay Nights	Expenditure	Expenditure
			per trip \$	per night \$
United Kingdom	15	39	6 677	171
New Zealand	14	20	2 713	139
USA	10	27	6 307	237
China	8	45	6 954	153
Japan	5	39	5 456	141
Korea	5	61	7 059	116
Germany	4	55	7 862	144
Singapore	3	39	6 156	158
Other Europe	13	54	8 229	153
Other Asia	14	58	6 765	117
Other countries	9	50	6 948	139
<b>Total</b>	<b>100%</b>	<b>43</b>	<b>6 355</b>	<b>148</b>

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**Table 4 Visitors by State and Territory, 2008**

	International	Domestic	Domestic
		overnight 000	day
New South Wales	1 725	3 345	3 049
Victoria	919	2 643	2 418
Queensland	1 095	1 728	1 267
South Australia	257	718	578
Western Australia	394	778	531
Tasmania	116	417	329
Northern Territory	280	219	34
Australian Capital Territory	126	728	307
<b>Total</b>	<b>2 668</b>	<b>9 667</b>	<b>8 514</b>

## What 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* (22%) or *visiting an aboriginal site or community* (11%) than domestic overnight (3% and 2%) and domestic day visitors (1% and 0%).

## How do they travel?

During 2008, 23% of international cultural and heritage visitors arrived on a travel package, compared to 17% of other visitors.

Domestic visitors are more likely to travel on a package than those not participating in these activities.

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

	International	Domestic	Domestic
		overnight %	day
Attend theatre concerts or other performing arts	24	23	22
Visit museums or art galleries	57	44	35
Visit art or craft workshops or studios	18	7	8
Attend festivals or fairs or cultural events	21	17	19
Experience Aboriginal art or craft and cultural displays	22	3	1
Visit an Aboriginal site or community	11	2	0
Visit historical/heritage buildings sites or monuments	61	30	24
<b>Total ('000)</b>	<b>2 668</b>	<b>9 667</b>	<b>8 514</b>

**Table 6 Visitors on travel package by country, 2008**

Country/region	Package	Package tour visitors as a
	tour visitors '000	proportion of total cultural and heritage visitors %
Japan	70	53
China	110	55
Korea	63	44
United Kingdom	63	16
USA	55	20
New Zealand	55	15
Taiwan	22	47
Germany	23	21
Other Europe	72	21
Other Asia	51	13
Other countries	30	12
<b>Total</b>	<b>615</b>	<b>23</b>

### Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS) 2008 (unpublished data)  
All figures refer to persons over the age of 15 years

## Key findings

- 9.7 million domestic overnight visitors and 8.5 million domestic day visitors participated in cultural and heritage activities in 2008.
- Despite decreases in international visitors, nights are increasing.
- 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*.
- New South Wales is the most popular State for both international and domestic visitors to visit.
- Domestic overnight cultural and heritage visitors travel *as an adult couple (42%)* or *as a family group (21%)*.
- European countries were more likely to participate in cultural and heritage activities than other international visitors.

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