

# SNAPSHOTS 2009

## CULTURAL AND HERITAGE TOURISM IN AUSTRALIA



**Australian Government**  
**Department of Resources, Energy and Tourism**  
**Tourism Research Australia**

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 2009.

### Definition

A cultural and heritage visitor participates in at least one of the following 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. 'Other visitors' are defined as domestic or international visitors who do not participate in cultural and heritage activities while in Australia.

### What are the most recent visitor trends?

International cultural and heritage visitors comprised half (51%) of all international visitors to Australia in 2009. The number of international visitors participating in cultural and heritage activities in 2009 remained relatively steady, and there has been an average annual growth of 2% in this market since 2000.

**Table 1 Visitor numbers and nights for cultural and heritage visitors**

	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	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	2.6	2%
Nights (millions)	75.7	78.8	77.9	78.9	82.3	92.7	103.5	107.1	114.2	119.2	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	9.3	2%
Nights (millions)	48.1	46.9	49.7	58.6	56.5	53.9	57.6	62.1	54.1	50.1	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	9.5	2%

In 2009, Australia's cultural and heritage tourism market was predominantly domestic visitors. There were 9.3 million domestic overnight visitors and 9.5 million domestic day visitors who participated in cultural and heritage activities in 2009. Domestic overnight cultural and heritage visitors experienced a decline during 2009 which was in line with the decrease in the total domestic overnight market. Domestic day cultural and heritage visitors increased by 11% on the previous year. Overall, the trend for the domestic overnight and domestic day cultural and heritage markets has been positive with an average annual growth of 2% for each market since 2000.

### How much did they spend?

International cultural and heritage visitors spent \$16 billion on trips to Australia in 2009. On average, international cultural and heritage visitors spent \$6,280 per trip compared to other international visitors who spent on average \$3,832. The higher spend per trip of cultural and heritage visitors was most likely due to their longer average length of stay (45 nights compared to other international visitors who spend 23 nights on average). Spend per night for international cultural and heritage visitors was lower (\$138) than spend by other visitors (\$169).

On average, cultural and heritage visitors from Switzerland (\$215), the United States (\$211), China (\$161) and Scandinavia (\$160) spent the most per night. Per trip, visitors from Switzerland (\$9,566), China (\$8,428) and Netherlands (\$8,028) spent the most on average.

Domestic overnight cultural and heritage visitors spent \$9.6 billion in 2009. On average, these visitors spent \$188 per night and \$1,030 per trip, which was higher than those not participating in cultural and heritage activities (\$159 per night and \$578 per trip).

**Table 2 International and domestic expenditure per visitor, 2009**

Expenditure items	International	Domestic
	Cultural and heritage	Cultural and heritage
	\$ per trip	\$ per trip
Food, drink & accommodation	1,949	562
Shopping	568	242
Domestic airfares	400	473
Other transport	1,846	188
Organised tours	568	362
Education	9,323	625
Entertainment	210	134
Other	1,428	468
<b>Total spend per person</b>	<b>6,280</b>	<b>1,030</b>
<b>Total spend per night</b>	<b>138</b>	<b>188</b>

Domestic day cultural and heritage visitors spent \$1.3 billion. This was \$133 per trip for cultural and heritage visitors, compared to \$100 per trip for other visitors.

Spend by cultural and heritage visitors refers to their total expenditure - not just cultural and heritage activities.

### Who were they?

Visitors from European countries such as Italy (73%), Switzerland (71%) and France (71%) 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 and Korea. International cultural and heritage visitors were more likely to be aged between 20 and 29 years (31%).

Domestic overnight cultural and heritage visitors travelled *as an adult couple* (34%) or *as a family group* (26%). Adult couple cultural and heritage visitors were more likely to participate in more than one activity than any other travel group, representing 38% of all visitors participating in two or more cultural and heritage activities. Over a quarter (26%) of cultural and heritage visitors were aged 60 years or older, compared to 19% of other visitors.

Domestic day cultural and heritage visitors were most likely to be *parents* (35%), *older non-working* (26%) and *aged between 45 and 64 years* (38%).

## How many activities did they participate in?

Of all international cultural and heritage visitors, 44% participated in only one cultural and heritage activity. Around one quarter (27%) participated in two cultural and heritage activities and 29% participated in three or more of these activities.

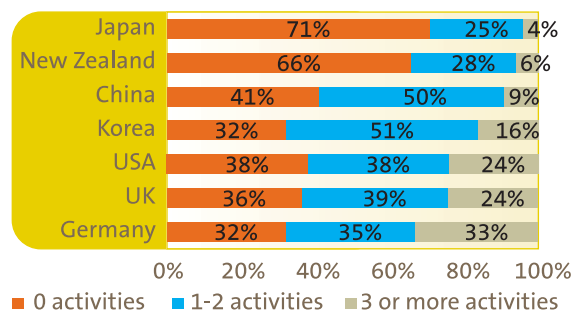
The majority of domestic day cultural and heritage visitors participated in only one activity type (90%) as did domestic overnight visitors (80%). Twenty per cent of domestic overnight visitors and 10% of domestic day visitors participated in two or more cultural and heritage activities.

## How long did they stay?

International cultural and heritage visitors stayed around 119 million nights in Australia which was a 4% increase on 2008. Visitors from Korea (79 nights), Thailand (74 nights) and India (74 nights) had the longest lengths of stay while visitors from New Zealand (18 nights) and the United States (28 nights) had comparatively short trips.

Domestic cultural and heritage visitors stayed around 51 million nights during 2009, which was a decrease of 6% on 2008. Cultural and heritage visitors from the Northern Territory took the longest trips, staying on average 8 nights, while visitors from New South Wales, Queensland and Tasmania took the shortest trips, staying on average 5 nights.

**Figure 1 Participation in cultural and heritage activities by key markets, 2009**



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**Table 3 Expenditure and length of stay by cultural and heritage visitors, 2009**

Country/region	Visitors %	Average stay Nights	Expenditure per trip \$	Expenditure per night \$
United Kingdom	15	42	6,078	143
New Zealand	13	18	2,389	131
USA	11	28	5,803	211
China	8	52	8,428	161
Japan	4	40	5,942	147
Korea	4	79	7,731	98
Germany	4	57	7,699	135
Singapore	4	36	5,587	155
Other Europe	13	55	7,991	144
Other Asia	16	58	6,612	114
Other countries	9	53	7,001	132
<b>Total</b>	<b>100</b>	<b>45</b>	<b>6,280</b>	<b>138</b>

## Where did they go?

New South Wales, Queensland and Victoria were the most popular states for domestic and international cultural and heritage visitors. Proportionally, however, participation in cultural and heritage activities was higher in the Northern Territory, the Australian Capital Territory and Tasmania.

The Mid North Coast and South Coast (NSW) were the most popular regional destinations for domestic overnight visitors, while Tropical North Queensland and Northern Rivers, NSW were the most popular regional destinations for international visitors.

## What activities did they participate in?

The top two cultural and heritage activities for both international and domestic overnight and day visitors were *visiting museums or 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* (20%) or *visiting an aboriginal site or community* (11%) than domestic overnight (3% and 2% respectively) and domestic day visitors (2% and 1% respectively).

**Table 4 Share of cultural and heritage visitors by activity type, 2009**

	International	Domestic overnight %	Domestic day
Attend theatre concerts or other performing arts	24	23	23
Visit museums or art galleries	57	43	36
Visit art or craft workshops or studios	17	6	5
Attend festivals or fairs or cultural events	22	19	20
Experience aboriginal art or craft and cultural displays	20	3	2
Visit an aboriginal site or community	11	2	1
Visit historical/ heritage buildings, sites or monuments	62	29	25
<b>Total</b>	<b>100</b>	<b>100</b>	<b>100</b>

## How did they travel?

During 2009, 19% of international cultural and heritage visitors arrived on a travel package, down from 23% in 2008.

Domestic visitors (10%) were more likely to travel on a package than those not participating in these activities (4%).

### Data sources

Tourism Research Australia National Visitor Survey (NVS) and International Visitor Survey (IVS), 2000–2009 (unpublished data)  
Tourism Research Australia Destination Visitor Survey (DVS) (unpublished data)

### Notes

All figures refer to persons over the age of 15 years

## Key findings

- 2.6 million international visitors, 9.3 million domestic overnight visitors and 9.5 million domestic day visitors participated in cultural and heritage activities in 2009.
- The domestic overnight cultural and heritage market increased by 11% in 2009.
- Both international and domestic cultural and heritage visitors spent more per trip than other visitors.
- The top two cultural and heritage activities for both international and domestic visitors were *visiting museums or art galleries* and *visiting heritage buildings, sites or monuments*.
- Northern Territory, the Australian Capital Territory and Tasmania had the highest participation rates for cultural and heritage tourism for both international and domestic overnight visitors.
- European visitors were more likely to participate in cultural and heritage activities than other international visitors.

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