

Cultural Tourism to NSW

Year ended December 2009



Definition

Cultural and heritage visitors participate in at least one of the following activities: attend theatre, concerts or other performing arts; visit museum or art galleries; visit art, craft workshops or studios; attend festivals, fairs, or cultural events; experience Aboriginal art, craft and cultural display; visit an Aboriginal site or community; visit historical heritage buildings, sites or monuments. Note: These visitors may also participate in other activities.

Overview

NSW received 7.8 million international⁽¹⁾ and domestic⁽²⁾ cultural and heritage visitors - down by 1.0% on YE Dec 08. Visitors spent 55.1 million nights in the State - up by 5.8% on YE Dec 08.

Cultural and heritage visitors to NSW spent \$10.3 billion (excl package tours and prepaid international airfares by overseas visitors) during their trip in Australia - up by 3.2% on YE Dec 08.

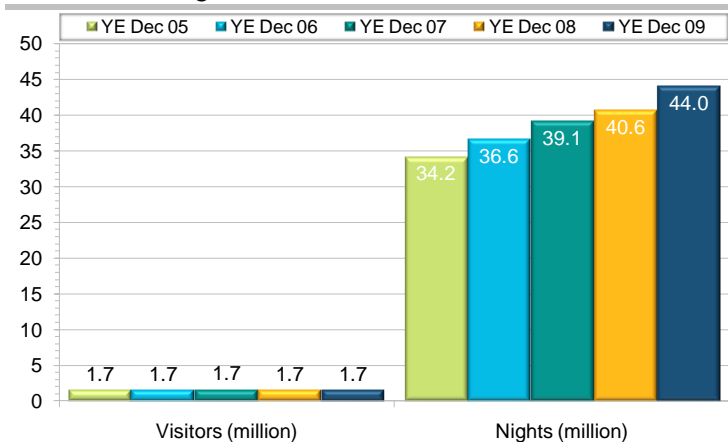
⁽¹⁾ Source: International Visitor Survey, YE Dec 09, Tourism Research Australia

⁽²⁾ Source: National Visitor Survey, YE Dec 09, Tourism Research Australia

International Market⁽¹⁾

The information in this section relates to international overnight visitors who engaged in a cultural and heritage activity during their trip to Australia, but not necessarily in a particular State or region.

Visitors and nights



NSW received nearly 1.7 million international cultural and heritage visitors - down by 3.7% on YE Dec 08. They spent 44.0 million nights in the State - up by 8.5% on YE Dec 08.

Between YE Dec 05 and YE Dec 09, cultural and heritage visitors to NSW experienced an average annual decline of 0.1%.

Market share

Cultural and heritage travellers represented 61.3% of visitors and 71.8% of nights by all international travellers to NSW. The State received 63.3% of visitors and 36.9% of nights by cultural and heritage travellers in Australia.

Seasonality

NSW received more international cultural and heritage visitors in the December quarter (30.2%) than any other time of the year, while they spent most nights in the March quarter (34.8%).

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
New Zealand	131	7.9%	2,015	4.6%	15.4
Korea	93	5.6%	4,281	9.7%	45.9
China	170	10.2%	5,726	13.0%	33.7
Other Asian markets (3)	306	18.4%	9,581	21.8%	31.3
USA	210	12.6%	3,051	6.9%	14.5
United Kingdom	265	16.0%	5,868	13.3%	22.1
Other European markets (4)	327	19.7%	8,652	19.7%	26.4
All other countries	159	9.6%	4,857	11.0%	30.5
Total	1,661		44,030		26.5

Other European markets⁽⁴⁾ (19.7%) was the largest source of international cultural and heritage visitors to NSW, followed by other Asian markets⁽³⁾ (18.4%).

Other Asian markets⁽³⁾ (21.8%) was the biggest contributor of nights in the State, followed by other European markets⁽⁴⁾ (19.7%).

⁽³⁾ All Asian markets, excluding Korea and China.

⁽⁴⁾ All European markets, excluding United Kingdom.

Average stay

International cultural and heritage visitors stayed an average of 26.5 nights in NSW. This was longer than the average for all visitors to the State (22.6 nights).

Cultural and heritage visitors from Thailand (59.7 nights) had the longest average stay in NSW, followed by visitors from other Asia (55.6 nights).

Accommodation

'Rented house / apartment / unit / flat' (42.8%) was the most popular accommodation type used for international cultural and heritage nights in NSW. 'Home of a friend or relative' (23.1%) was the 2nd most popular accommodation type used, followed by 'backpacker / hostel' (8.6%).

Expenditure⁽⁵⁾

International cultural and heritage visitors to NSW spent \$7.2 billion (excl package expenditure) during their trip to Australia - up by 3.6% on YE Dec 08. On average, visitors who had been to NSW spent \$4,353 per visitor and \$164 per night.

⁽⁵⁾ Excluding package tours and prepaid international airfares.

Type of cultural and heritage activity

Cultural and heritage activity	Visitors	
	('000)	%
Visit history / heritage buildings, sites or monuments	1,166	70.2%
Visit museums or art galleries	963	58.0%
Attend theatre, concerts or other performing arts	411	24.7%
Attend festivals / fairs or cultural events	377	22.7%
Experience aboriginal art / craft and cultural displays	372	22.4%
Visit art / craft workshops / studios	275	16.5%
Visit an aboriginal site / community	210	12.7%
Average number of cultural and heritage activities	2.3	

'Visited history / heritage buildings, sites or monuments' (70.2%) was the most popular cultural and heritage activity undertaken by international visitors who had been to NSW.



Cultural Tourism to NSW

Year ended December 2009



International Market continued

Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast	52	79.2%	-	-	-
Illawarra	36	68.9%	1,033	72.1%	28.9
Sydney	1,585	62.2%	37,694	72.2%	23.8
Snowy Mountains	15	83.0%	-	-	-
Capital Country	14	71.9%	-	-	-
The Murray	9	62.5%	-	-	-
Riverina	16	64.1%	-	-	-
Central NSW	25	63.9%	-	-	-
The Hunter	77	67.3%	1,197	69.7%	15.5
Mid North Coast	114	75.6%	-	-	-
Northern Rivers	176	75.6%	1,339	73.7%	7.6
New England North West	35	69.5%	-	-	-
Outback NSW	11	78.7%	-	-	-
Central Coast	20	60.0%	-	-	-
Blue Mountains	55	77.9%	-	-	-
Lord Howe Island	-	-	-	-	-

- = estimate considered statistically unreliable

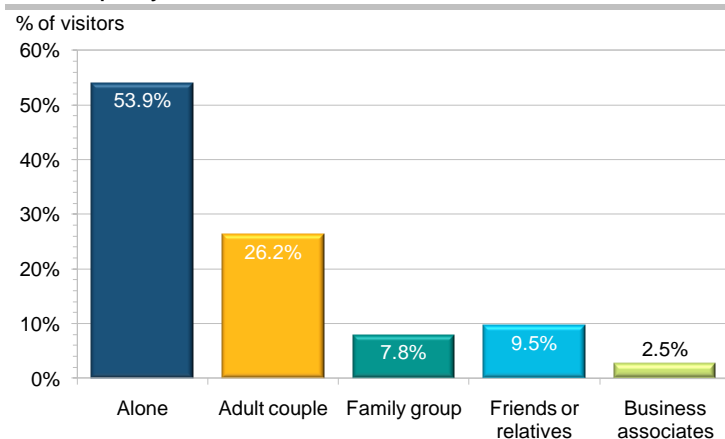
'Snowy Mountains' (83.0%) had the highest proportion of international visitors who engaged in a cultural and heritage activity. 'South Coast' (79.2%) had the 2nd highest proportion, followed by 'Outback NSW' (78.7%).

'Northern Rivers' (73.7%) had the highest proportion of nights spent by cultural and heritage visitors, followed by 'Sydney' (72.2%) and 'Illawarra' (72.1%).

Transport

'Aircraft' (33.4%) was the most common transport used to destinations in NSW by international cultural and heritage visitors. 'Private or company car' (27.7%) was the 2nd most common, followed by 'taxi or chauffeur driven hire car' (17.7%).

Travel party

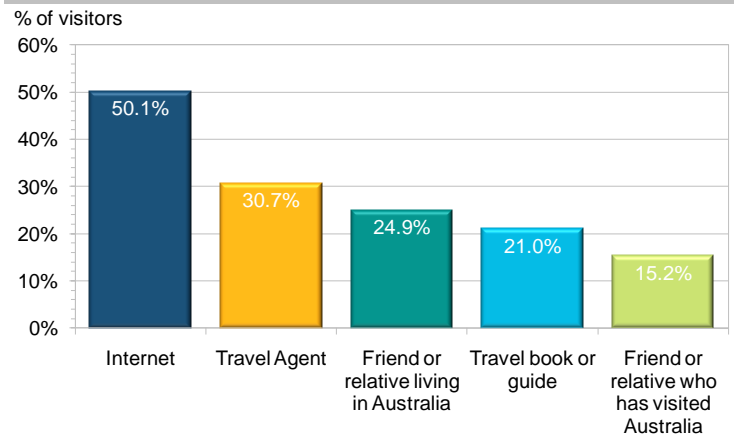


'Alone' (53.9%) was the most popular travel party of international cultural and heritage visitors to NSW. 'Adult couple' (26.2%) was the 2nd most popular travel party, followed by 'friends and relatives' (9.5%).

Package tours

Nearly ¼ (22.5%) of international cultural and heritage visitors to NSW, arrived in Australia on a travel package. 'All accommodation' (80.1%) was the most popular travel arrangement included in the package (other than 'international airfares').

Information sources



The 'internet' (50.1%) was the most popular information source for the trip to Australia by cultural and heritage visitors who had been to NSW. 'Travel agent' (30.7%) was the 2nd most popular, followed by 'friend or relative living in Australia' (24.9%).

Of those international cultural and heritage visitors to NSW, who had used the internet for this visit to Australia, over ½ (54.0%) had booked at least part of the trip on the internet.

Group tours

The rate of group tour travel to Australia amongst international cultural and heritage visitors who had been to NSW was 12.9%.

Return visitors

Over 2/5 (41.5%) of international cultural and heritage visitors to NSW were on a return visit to Australia. This was a lower percentage than for all visitors to the State (52.0%).

Age

Cultural and heritage activity	15-24 years	25-34 years	35-44 years	45-54 years	55-65 years	65 years+
Attend theatre, concerts or other performing arts	26.7%	26.6%	12.7%	11.0%	15.3%	7.7%
Visit museums or art galleries	24.0%	25.4%	13.3%	14.5%	15.1%	7.7%
Visit art / craft workshops / studios	21.0%	22.1%	12.8%	14.5%	20.5%	9.1%
Attend festivals / fairs or cultural events	34.1%	29.1%	12.0%	10.3%	10.2%	4.3%
Experience aboriginal art / craft and cultural displays	24.8%	26.0%	10.7%	13.1%	16.9%	8.4%
Visit an aboriginal site / community	25.2%	29.6%	10.3%	10.1%	15.6%	9.2%
Visit history / heritage buildings, sites or monuments	19.8%	25.0%	14.5%	16.9%	16.4%	7.4%
All cultural and heritage visitors	21.7%	25.8%	14.1%	15.5%	15.7%	7.2%

Aged '25-34 years' (25.8%) was the biggest age group of international cultural and heritage visitors to NSW. '15-24 years' (21.7%) was the 2nd biggest, followed by '55-64 years' (15.7%).

'25-34 years' was the largest age group for each type of cultural and heritage activity, except for 'attend festivals / fairs or cultural events' and 'attend theatre, concert or other performing arts' for which '15-24 years' was the largest.

Cultural Tourism to NSW

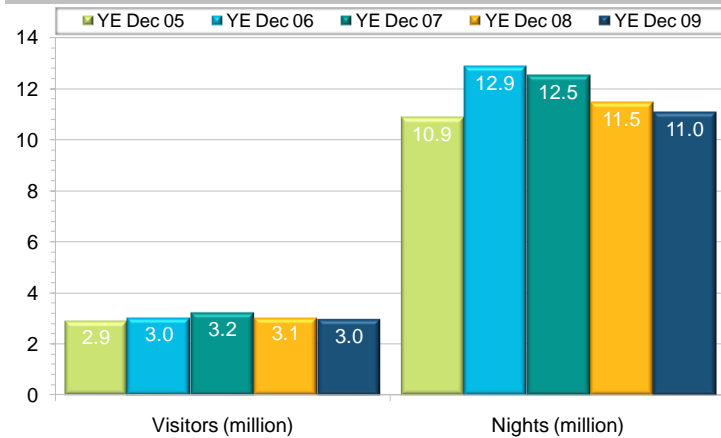
Year ended December 2009



Domestic Market⁽²⁾

The information in this section relates to domestic visitors who engaged in a cultural and heritage activity in NSW.

Visitors and nights



NSW received 3.0 million domestic cultural and heritage overnight visitors - down by 2.8% on YE Dec 08. They spent 11.0 million nights in the State - down by 3.7% on YE Dec 08.

Between YE Dec 05 and YE Dec 09, cultural and heritage overnight visitors to NSW experienced an average annual growth of 0.4%.

Market share

Cultural and heritage travellers represented 13.2% of visitors and 14.4% of nights by domestic overnight travellers to NSW. The State received 32.0% of visitors and 21.7% of nights by cultural and heritage travellers in Australia.

Expenditure

Domestic cultural and heritage overnight visitors to NSW spent \$2.6 billion (incl airfares and transport costs) during their trip - up by 0.4% on YE Dec 08.

On average, visitors spent \$885 per visitor and \$238 per night in NSW.

Origin

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	1,097	36.9%	3,459	31.3%	3.2
Sydney	744	25.0%	2,783	25.2%	3.7
Intrastate	1,841	61.9%	6,242	56.5%	3.4
Victoria	404	13.6%	1,794	16.2%	4.4
Queensland	374	12.6%	1,460	13.2%	3.9
ACT	177	5.9%	609	5.5%	3.4
Other interstate	178	6.0%	944	8.5%	5.3
Total Interstate	1,134	38.1%	4,806	43.5%	4.2
Total	2,975	100.0%	11,048		3.7

NSW received 61.9% of domestic cultural and heritage overnight **visitors** from intrastate and 38.1% from interstate. Regional NSW (36.9%) was the biggest source market, while Victoria (13.6%) was the biggest interstate market.

Intrastate contributed 56.5% of cultural and heritage visitor **nights** in the State, while interstate contributed 43.5%. Regional NSW (31.3%) was the biggest source market, while Victoria (16.2%) was the biggest interstate market.

Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
South Coast	229	11.0%	1,176	14.6%	5.1
Illawarra	76	9.6%	-	-	-
Sydney	1,094	16.1%	3,563	18.7%	3.3
Snowy Mountains	61	9.7%	-	-	-
Capital Country	117	13.0%	-	-	-
The Murray	70	8.8%	-	-	-
Riverina	96	10.3%	-	-	-
Central NSW	190	12.0%	549	13.5%	2.9
The Hunter	192	9.7%	537	10.1%	2.8
Mid North Coast	296	10.1%	1,247	10.7%	4.2
Northern Rivers	189	11.5%	1,032	15.3%	5.5
New England North West	172	13.6%	628	16.4%	3.7
Outback NSW	96	23.8%	-	-	-
Central Coast	88	7.6%	-	-	-
Blue Mountains	67	11.9%	-	-	-
Lord Howe Island	-	-	-	-	-

- = estimate considered statistically unreliable

'Outback NSW' (23.8%) had the highest proportion of domestic overnight visitors who engaged in a cultural and heritage activity. 'Sydney' (16.1%) had the 2nd highest proportion, followed by 'New England North West' (13.6%).

'Sydney' (18.7%) had the highest proportion of nights spent by cultural and heritage visitors, followed by 'New England North West' (16.4%) and 'Northern Rivers' (15.3%).

Average stay

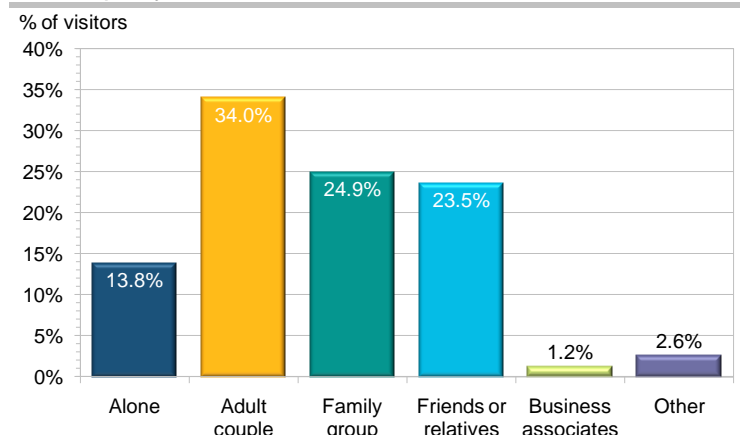
Domestic cultural and heritage visitors stayed, on average, 3.7 nights in NSW. This was longer than the average for all visitors to the State (3.4 nights).

Interstate visitors to NSW stayed 0.8 nights longer than intrastate visitors (4.2 vs 3.4 nights).

Accommodation

'Friends or relatives property' (35.6%) was the most popular accommodation type used for domestic cultural and heritage visitor nights in NSW. 'Standard hotel, motor inn, below 4 star' (16.3%) was the 2nd most popular accommodation used type used, followed by 'rented house, apartment, flat or unit' (13.0%).

Travel party



'Adult couple' (34.0%) was the biggest travel party of domestic cultural and heritage overnight visitors to NSW. 'Family group' (24.9%) was the 2nd biggest travel party, followed by 'friends or relatives' (23.5%).



Domestic Market continued

Age

Cultural and heritage activity	15-24 years	25-34 years	35-44 years	45-54 years	55-65 years	65 years+
Attend theatre, concerts or other performing arts	16.9%	10.5%	17.8%	18.5%	17.9%	18.5%
Visit museums or art galleries	9.9%	8.8%	21.5%	18.1%	21.3%	20.5%
Visit art / craft workshops / studios	5.3%	4.6%	9.9%	31.1%	24.5%	23.8%
Attend festivals / fairs or cultural events	15.2%	17.7%	23.7%	16.2%	14.0%	13.2%
Experience aboriginal art / craft and cultural displays	5.0%	0.0%	30.0%	21.7%	15.0%	30.0%
Visit an aboriginal site / community	0.0%	12.9%	22.6%	29.0%	25.8%	6.5%
Visit history / heritage buildings, sites or monuments	12.1%	10.9%	20.2%	17.3%	22.2%	17.2%
All cultural and heritage visitors	13.3%	12.0%	20.7%	17.6%	18.8%	17.7%

Aged '35-44 years' (20.7%) was the biggest age group of domestic cultural and heritage overnight visitors to NSW. '55-64 years' (18.8%) was the 2nd biggest age group.

Transport

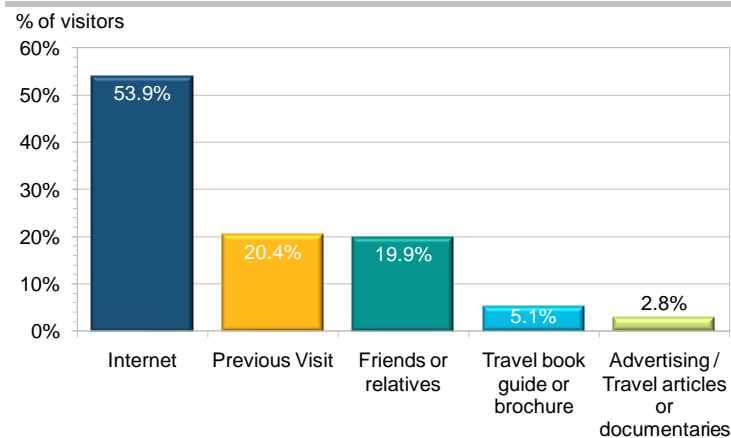
'Private or company vehicle' (69.9%) was the most common transport used to destinations in NSW by domestic cultural and heritage overnight visitors. 'Air transport' (19.4%) was the 2nd most common, followed by 'railway' (4.8%).

Household income⁽⁶⁾

Nearly 3/5 (56.0%) of domestic cultural and heritage overnight visitors to NSW had an annual household income above \$78,000. This was a smaller percentage than for all visitors to the State (59.0%).

⁽⁶⁾ Based on visitors who provided household income details.

Information sources



The 'internet' (53.9%) was the most popular information source for the trip in Australia by domestic cultural and heritage overnight visitors who had been to NSW. 'Previous visit' (20.4%) was the 2nd most popular, followed by 'friends or relatives' (19.9%).

Type of cultural and heritage activity

Cultural and heritage activity	Visitors ('000)	%
Visit museums or art galleries	1,187	39.9%
Visit history / heritage buildings, sites or monuments	896	30.1%
Attend theatre, concerts or other performing arts	708	23.8%
Attend festivals / fairs or cultural events	598	20.1%
Visit art / craft workshops / studios	151	5.1%
Experience aboriginal art / craft and cultural displays	60	2.0%
Visit an aboriginal site / community	-	-
Average number of cultural and heritage activities	1.2	

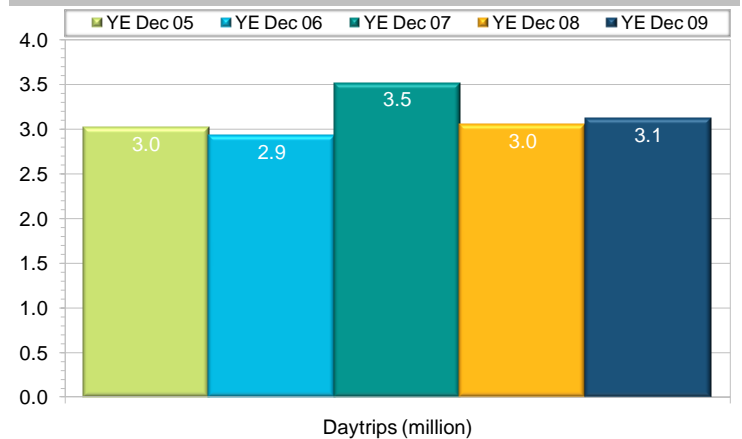
- = estimate considered statistically unreliable

'Visited museums or art galleries' (39.9%) was the most popular cultural and heritage activity undertaken by domestic overnight visitors to NSW.

Seasonality

The December quarter (27.1%) had the most domestic cultural and heritage overnight visitors to NSW, while the March quarter (30.9%) attracted the most nights.

Daytrips



NSW received 3.1 million domestic cultural and heritage daytrip visitors - up by 2.4% on YE Dec 08. Between YE Dec 05 and YE Dec 09, cultural and heritage daytrip visitors to NSW experienced an average annual growth of 0.9%.

Market share - daytrips

Cultural and heritage day-trippers represented 6.7% of domestic daytrip visitors to NSW. The State received 33.0% of cultural and heritage daytrip travellers in Australia.

Expenditure on daytrips

Domestic cultural and heritage daytrip visitors to NSW spent \$421 million during their trip - up by 15.6% on YE Dec 08. On average, visitors spent \$135 per trip in NSW.

Type of cultural and heritage activity on daytrips

Nearly 1/3 (31.4%) of cultural and heritage daytrip visitors to NSW 'visited museums or art galleries'.

Image reference

Photographs (in order of appearance on each page): Chinese New Year, Hamilton Lund; Tammie Jarrett, Gumbainggir Tribe (North Coast), Greg Barrett; Museum of Contemporary Art; Kurri Kurri Nostalgia Festival.