

CULTURAL & HERITAGE TOURISM IN AUSTRALIA

APRIL 2016



Cultural & heritage tourism in Australia – Visitors

Australia's cultural and heritage offerings form a significant component of our destination brands, acting as a critical demand driver within the \$110 billion visitor economy.

Tourism patronage also underpins the viability of our cultural institutions and major events, providing high-yielding visitors who typically stay longer and spend more.

In 2015, cultural and heritage activities were undertaken by:

- **3.7 million** international visitors
- **14.5 million** domestic overnight visitors
- **13.8 million** domestic day visitors

This represented:

- **54%** of all international visitors
- **26%** of all domestic overnight visitors
- **8%** of all domestic day visitors

TTF analysis of Tourism Research Australia's *International* and *National Visitor Surveys*.
All figures presented relate to visitors aged 15 years and above.

Cultural & heritage tourism in Australia – Yield

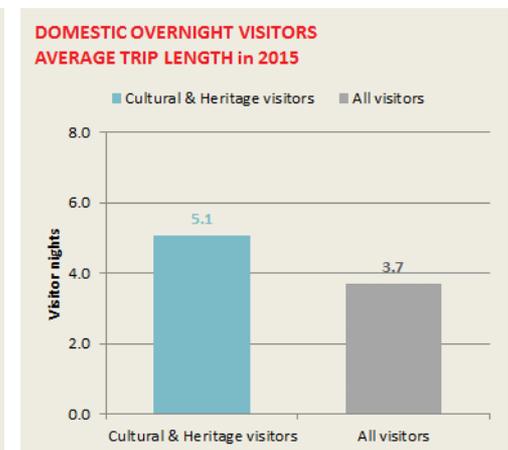
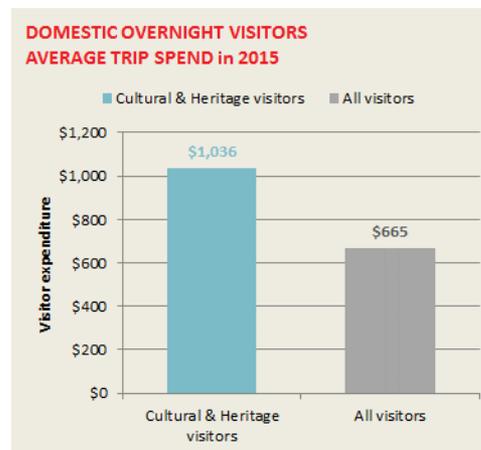
Cultural and heritage visitors generate higher yield on average, spending more and staying longer.

INTERNATIONAL VISITORS

- Spend 24% more (\$4,427 vs \$3,579)
- Stay 24% longer (44.7 vs 36.2 nights)

DOMESTIC OVERNIGHT VISITORS

- Spend 56% more (\$1,036 vs \$665)
- Stay 37% longer (5.1 vs 3.7 nights)



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Cultural & heritage tourism in Australia – Trends

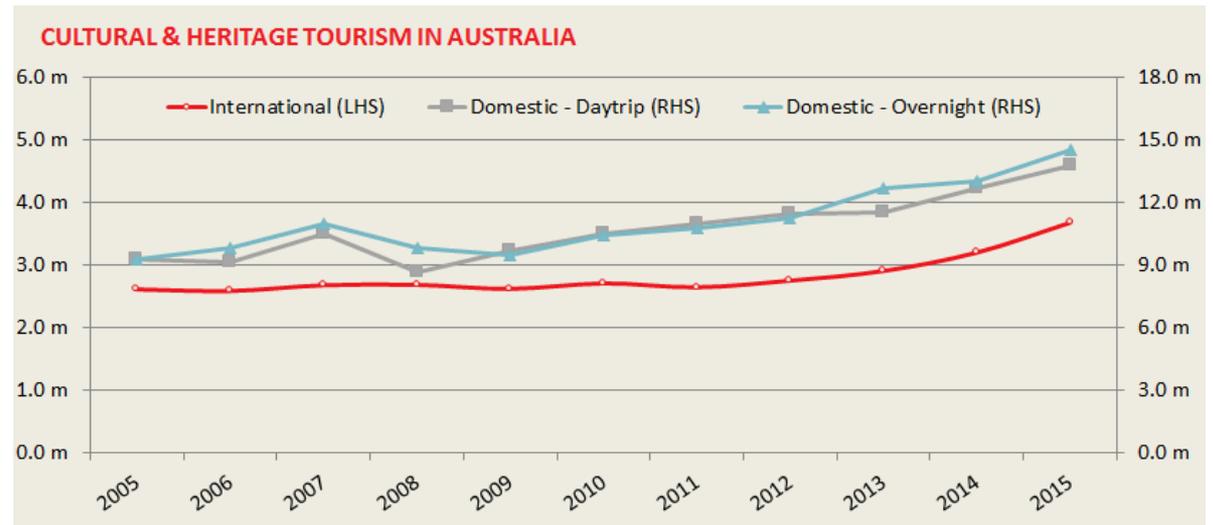
Cultural & heritage tourism has outpaced growth in international and domestic overnight visitation in 2015, while there was comparable growth from a domestic daytrip perspective.

CULTURAL & HERITAGE TOURISM

- International **+15%**
- Domestic overnight **+11%**
- Domestic day **+9%**

OVERALL TOURISM

- International **+8%**
- Domestic overnight **+7%**
- Domestic day **+9%**



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Cultural & heritage tourism in Australia – Activities

Preferences are similar among international and domestic visitors - visits to *museums and art galleries* and *historical / heritage buildings, sites or monuments* were the most popular cultural activities for visitors in 2015.

INTERNATIONAL VISITORS in 2015

The largest absolute increases occurred in visits to *historical / heritage buildings, sites or monuments*, followed by *museums and art galleries* and *attending festivals / fairs or cultural events*.

The largest relative (growth) increases occurred in *attending festivals / fairs or cultural events* (25.2%) and visits to *historical / heritage buildings, sites or monuments* (24.1%) – both well above the total category growth outcome of 14.9%.

DOMESTIC OVERNIGHT VISITORS in 2015

The largest absolute increases occurred in visits to *historical / heritage buildings, sites or monuments*, followed by *museums and art galleries* and *attending theatre, concerts or other performances*.

The largest relative (growth) increases occurred in visits to *art / craft / workshops / studios* (26.4%) and visits to *history / heritage buildings, sites or monuments* (23.9%).

DOMESTIC DAY VISITORS in 2015

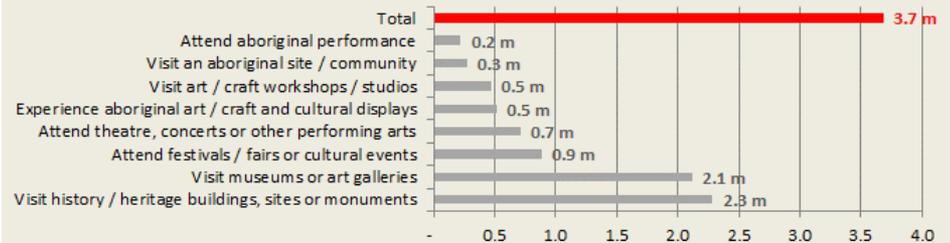
The largest absolute increases occurred in visits to *historical / heritage buildings, sites or monuments*, followed *attending theatre, concerts or other performances*.

The largest relative (growth) increases occurred in *experience aboriginal art / craft and cultural displays* (142.8%) and *visit an aboriginal site / community* (30.8%).

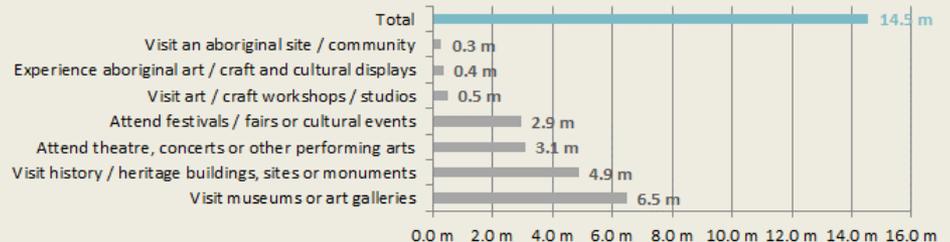
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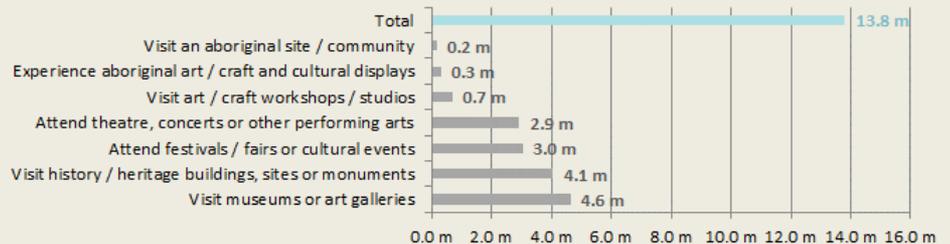
INTERNATIONAL VISITORS & CULTURAL ACTIVITIES, 2015



DOMESTIC OVERNIGHT VISITORS & CULTURAL ACTIVITIES, 2015



DOMESTIC OVERNIGHT VISITORS & CULTURAL ACTIVITIES, 2015



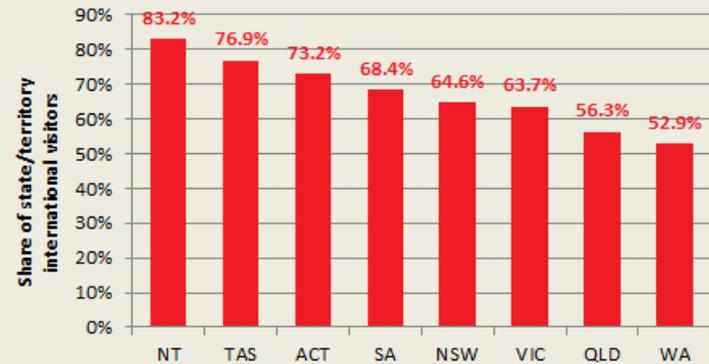
Cultural & heritage tourism in Australia – Destinations

The larger states naturally dominate in volume terms for share of all cultural and heritage visitors, with NSW, Victoria and Queensland leading the way.

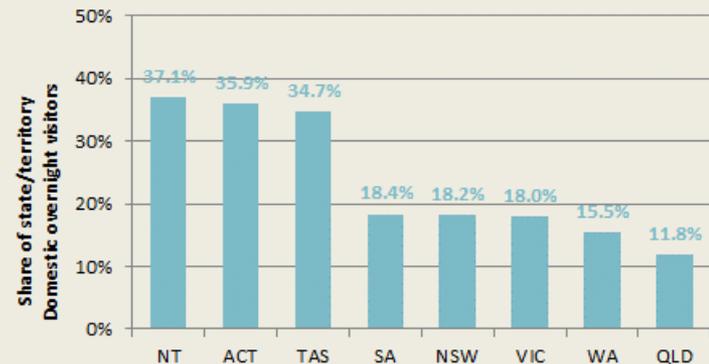
However, a greater proportion of cultural and heritage activities are undertaken by international visitors to the NT (83.2%), Tasmania (76.9%) and the ACT (73.2%) – although at least one out of every two international visitors to each state and territory will engage in a cultural or heritage activity.

A similar visitation profile exists for domestic overnight visitors, with visitors to the NT (37.1%), ACT (35.9%) and TAS (34.7%) more likely to engage in a cultural or heritage activity.

CULTURAL INTERNATIONAL VISITORS AS SHARE OF STATE/TERRITORY MARKET in 2015



CULTURAL DOMESTIC OVERNIGHT VISITORS AS SHARE OF STATE/TERRITORY MARKET in 2015



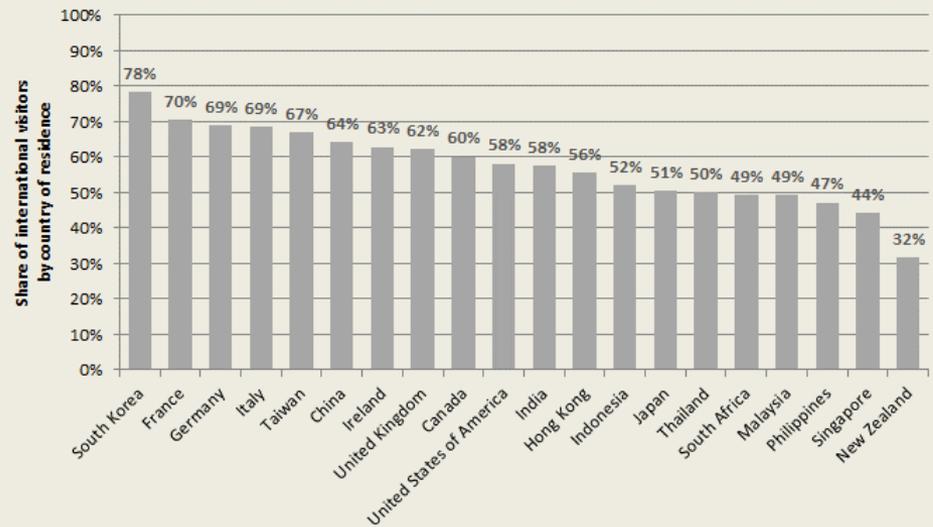
TTF analysis of Tourism Research Australia's *International and National Visitor Surveys*. All figures presented relate to visitors aged 15 years and above.

Cultural & heritage tourism in Australia – Markets

While 54% of all international visitors participate in cultural and heritage activities, 12 of Australia's top 20 source markets demonstrated even greater propensity for cultural tourism in 2015 – led by South Korea, France, Germany, Italy and Taiwan.

Fast growing emerging Asian markets are showing an increasing propensity to engage in cultural and heritage activities - there has been a rapid increase in visitors from China (39.4%), the Philippines (33.6%), India (29.7%), Singapore (22.0%) and Hong Kong (20.7%) in 2015.

CULTURAL INTERNATIONAL VISITORS AS SHARE OF COUNTRY MARKET in 2015



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Cultural & heritage tourism in Australia – Market trends

The overall propensity for international visitors to engage in cultural tourism has jumped in the past year (50.4% in 2014 vs 53.7% in 2015) after stagnating over the preceding five years. All of Australia's top 20 source markets showed an increasing propensity for cultural and heritage activities in 2015.

The proportion of international visitors who participated in cultural and heritage activities rose in particular for:

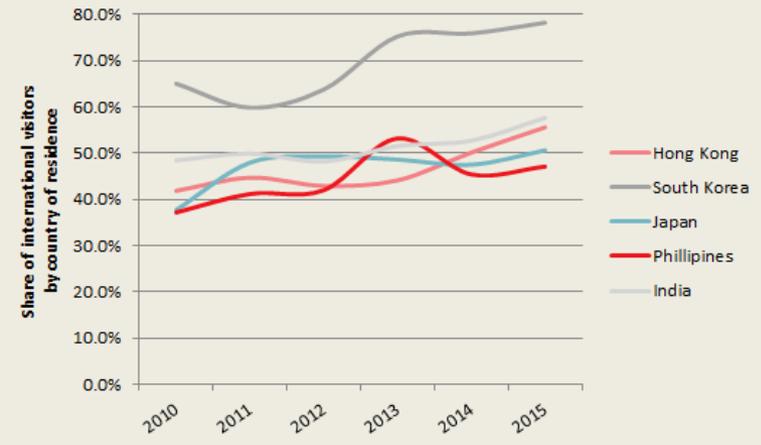
- China (+8pt, 56% to 64%)
- Singapore (+6pt, 38% to 44%)
- Hong Kong (+6pt, 50% to 56%)
- Indonesia (+5pt, 47% to 52%)
- India (+5pt, 53% to 58%)

Looking at longer term trends, the propensity for cultural tourism has grown mostly strongly between 2010 and 2015 for:

- Hong Kong (+14pt, 42% to 56%)
- South Korea (+13pt, 65% to 78%)
- Japan (+13pt, 38% to 51%)
- Philippines (+10pt, 37% to 47%)
- India (+9pt, 49% to 58%)

While the propensity for cultural tourism stagnated somewhat in the first half of the decade, there are opportunities to capture the growing interest from emerging markets and traditional markets returning to growth - as well as a recent boost in the overall propensity of international visitors in general participating in cultural and heritage activities.

**CULTURAL INTERNATIONAL VISITORS
KEY MARKETS WITH GROWING PARTICIPATION RATES**



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