

# CULTURAL & HERITAGE TOURISM IN AUSTRALIA

## TTF CULTURAL TOURISM ROUNDTABLE | JULY 2014



# 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 stay longer and spend more.

In 2013, cultural and heritage activities were undertaken by:

- **2.9 million** international visitors
- **12.7 million** domestic overnight visitors
- **11.5 million** domestic day visitors

This represented:

- **49%** of all international visitors
- **17%** of all domestic overnight visitors
- **7%** 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 27% more (\$4,220 vs \$3,327)
- Stay 30% longer (47.8 vs 36.7 nights)

## DOMESTIC OVERNIGHT VISITORS

- Spend 51% more (\$1,027 vs \$679)
- Stay 35% longer (5.0 vs 3.7 nights)

INTERNATIONAL VISITORS  
AVERAGE TRIP SPEND, 2013



INTERNATIONAL VISITORS  
AVERAGE TRIP LENGTH, 2013



DOMESTIC OVERNIGHT VISITORS  
AVERAGE TRIP SPEND, 2013



DOMESTIC OVERNIGHT VISITORS  
AVERAGE TRIP LENGTH, 2013



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# Cultural & heritage tourism in Australia – Trends

Cultural & heritage tourism has kept pace with growth in international arrivals in 2013. The sector has also outperformed the overall domestic market on both the overnight and day trip front.

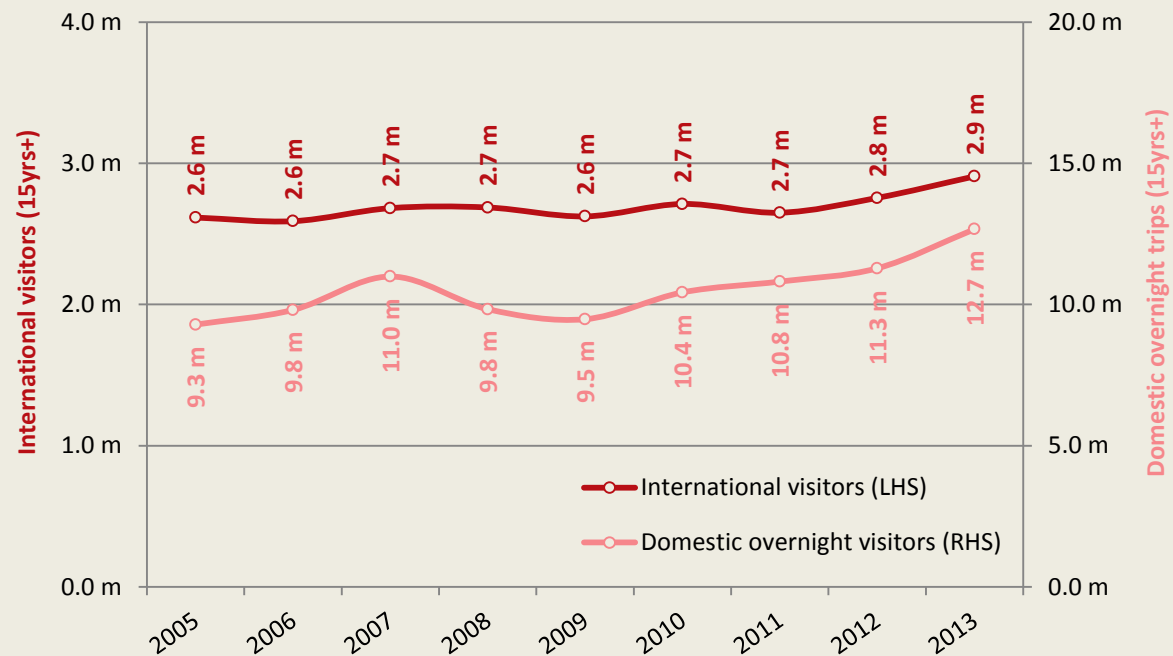
## CULTURAL & HERITAGE TOURISM

- International **+5.5%**
- Domestic overnight **+12.3%**
- Domestic day **+0.5%**

## OVERALL TOURISM

- International **+5.6%**
- Domestic overnight **+1.8%**
- Domestic day **-5.5%**

## CULTURAL & HERITAGE TOURISM IN AUSTRALIA



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# Cultural & heritage tourism in Australia – Activities

Preferences are similar among international and domestic visitors, with visits to *museums and art galleries* consistently the most popular cultural activity undertaken during a trip.

## INTERNATIONAL VISITORS

Growth in cultural and heritage tourism over the past year has been led in volume terms by visits to *museums and art galleries* and attendance at *theatre, concerts and other performances*, while visitors experiencing *aboriginal art/craft and cultural displays* and visits to *art/craft workshops and studios* declined.

In percentage terms, the above-average gains have occurred in visits to *theatre, concerts and other performances* (+12.4%), *festivals, fairs and cultural events* (+8.1%), and *museums and art galleries* (+7.1%).

## DOMESTIC OVERNIGHT VISITORS

Growth in 2013 has been led in volume terms by visits to *museums and art galleries*, and *heritage buildings, sites and monuments*.

In percentage terms, the majority of activity groups saw double-digit growth, led by those experiencing *aboriginal art/craft and cultural displays* (+50.0%), visiting *art/craft workshops and studios* (+19.5%), *theatre, concerts and other performances* (+18.8%), and *heritage buildings, sites and monuments* (+18.4%).

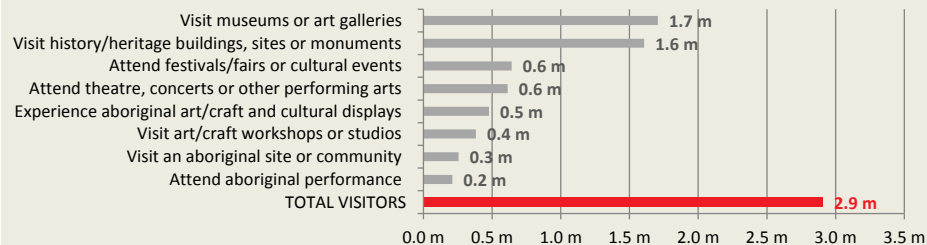
## DOMESTIC DAY VISITORS

Growth in this segment over the past year has been led in both volume and percentage terms by visits to *heritage buildings, sites and monuments* (+15.9%).

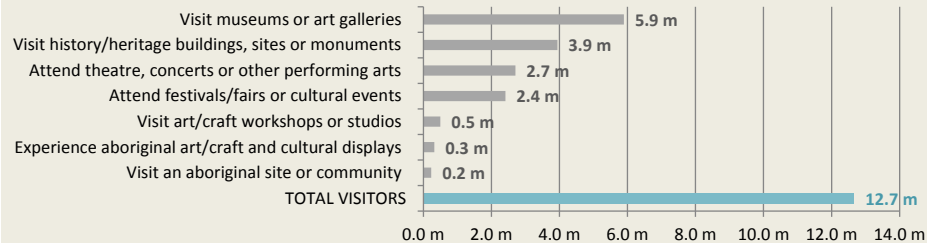
Meanwhile, declining visitation was recorded for attendance at *theatre, concerts and performances*; *festivals, fairs and cultural events*; and *museums and art galleries*.

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

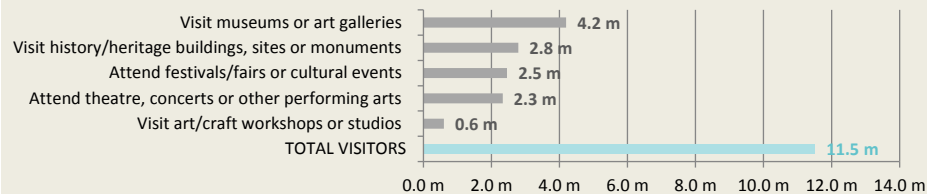
### INTERNATIONAL VISITORS & CULTURAL ACTIVITIES, 2013



### DOMESTIC OVERNIGHT VISITORS & CULTURAL ACTIVITIES, 2013



### DOMESTIC DAY VISITORS & CULTURAL ACTIVITIES, 2013





# Cultural & heritage tourism in Australia – Destinations

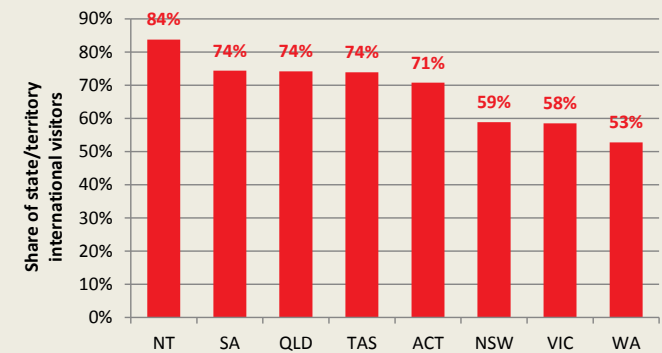
The larger states naturally dominate in volume terms for share of all cultural and heritage visitors, with NSW, Victoria and Queensland leading the way.

However, an examination of the propensity for cultural and heritage activities within international visitors to each state and territory sees the NT top the list, with 84% of international visitors to the territory participating in some form of cultural or heritage activity, and three-quarters of visitors to SA, Queensland and Tasmania doing likewise.

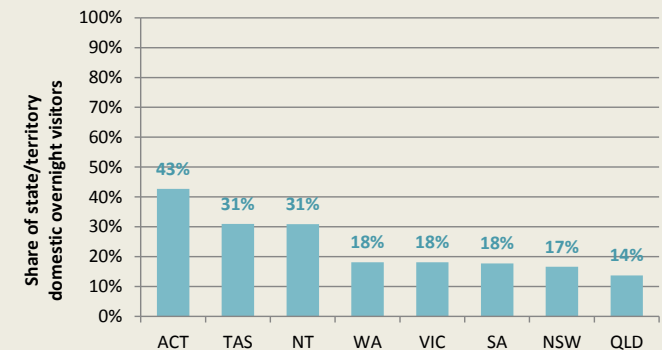
Within the domestic overnight market, the ACT boasts the greatest share of visitors engaging with the cultural sector, totalling 43% of all domestic overnight visitors to the territory. Visitors to Tasmania and the NT also display greater propensity for cultural tourism, accounting for just under a third of each jurisdiction's market.

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

**CULTURAL INTERNATIONAL VISITORS  
AS SHARE OF STATE/TERRITORY MARKET, 2013**



**CULTURAL DOMESTIC OVERNIGHT VISITORS  
AS SHARE OF STATE/TERRITORY MARKET, 2013**

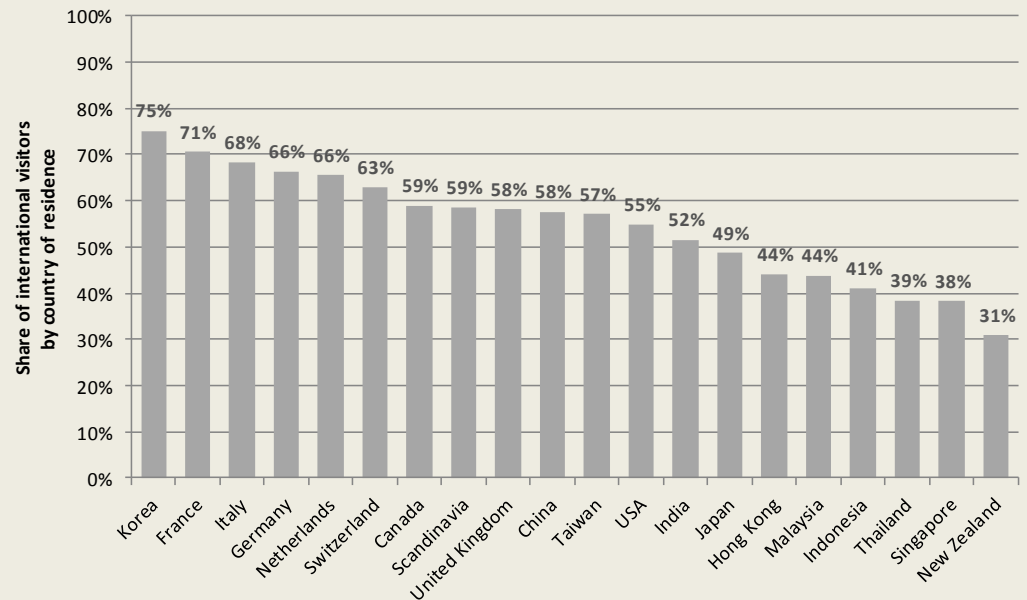


# Cultural & heritage tourism in Australia – Markets

While 49% of all international visitors participate in cultural and heritage activities, 13 of Australia's top 20 markets demonstrate even greater propensity for cultural tourism – led by more established markets including Korea, France, Italy, Germany and the Netherlands.

Though emerging Asian markets still lag traditional markets on propensity, 58% of visitors from China and 52% from India now participate in cultural and heritage activities. Both markets display greater than average propensity for visiting *museums and art galleries* and *heritage buildings, sites and monuments*. The same was true of Indian visitors' attendance at *festivals, fairs and cultural events*, and Chinese visitors' attendance at *aboriginal performances* – the latter second only to Switzerland.

**CULTURAL INTERNATIONAL VISITORS  
AS SHARE OF COUNTRY MARKET, FY 2013**



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# Cultural & heritage tourism in Australia – Market trends

Over the five years to December 2013, the overall propensity for international visitors to engage in cultural tourism has declined, having peaked at 53% in 2008. The metric has stabilised over the past year, with six of Australia's top 20 markets increasing their propensity for cultural and heritage activities.

Over past five years, the proportion of visitors who participate in cultural and heritage activities has fallen in particular for:

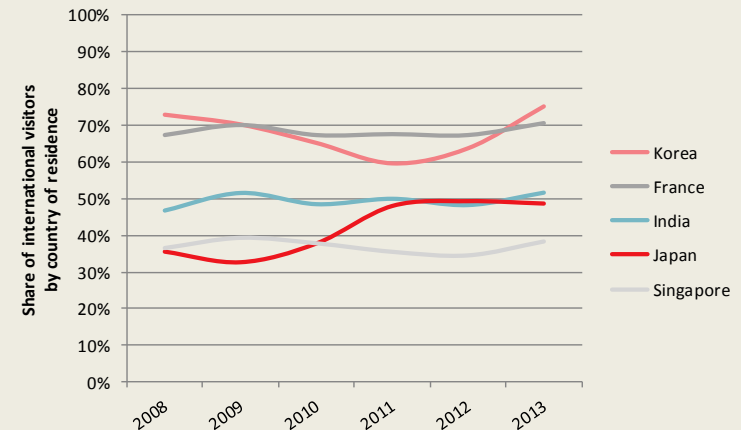
- Thailand (-11pt, 50% to 39%)
- Canada (-10pt, 69% to 59%)
- Taiwan (-9pt, 66% to 57%)
- USA (-9pt, 64% to 55%)
- Scandinavia (-8pt, 67% to 59%)

However, the propensity for cultural tourism has grown over the same period in five other key markets:

- Japan (+13pt, 36% to 49%)
- India (+5pt, 47% to 52%)
- France (+3%, 67% to 71%)
- Korea (+2pt, 73% to 75%)
- Singapore (+2pt, 37% to 38%)

**While the propensity for cultural tourism has declined in some markets over the medium term, 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 participating in cultural and heritage activities.**

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



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