Overview

NSW received over 1.4 million overnight visitors who participated in an Aboriginal activity - up by 1.2% on YE Sep 13. These visitors spent almost 18.5 million nights in the State - down by 2.5% on YE Sep 13.

The growth in Aboriginal tourism to NSW came from increased participation in Aboriginal activities by domestic overnight visitors.

Aboriginal tourism participants spent an estimated $2.4 billion in NSW - up by 5.3% on YE Sep 13.

(2) Total expenditure on the trip, including Aboriginal activity spend.

International Market

The information in this section relates to international overnight visitors who participated in an Aboriginal activity during their trip to Australia, but not necessarily in a particular State or region.

Visitors and nights

NSW received 597,000 international Aboriginal tourism participants - down by 5.3% on YE Sep 13. They spent nearly 14.8 million nights in the State - down by 4.8% on YE Sep 13.

Market share

Aboriginal tourism participants represented 18.9% of visitors and 19.5% of nights by all international travellers to NSW. Compared with YE Sep 13, the share of visitors and the share of nights were both down by 2.4% pts.

The State received 64.7% of visitors and 31.1% of nights by Aboriginal tourism participants in Australia. Compared with YE Sep 13, the share of visitors was down by 0.5% pts and the share of nights was up by 1.2% pts.

Type of Aboriginal activity

<table>
<thead>
<tr>
<th>Rank</th>
<th>Aboriginal tourism activity</th>
<th>International visitors ('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>See any Aboriginal art, craft or cultural display</td>
<td>229</td>
<td>38.4%</td>
</tr>
<tr>
<td>2</td>
<td>Attend an Aboriginal dance or theatre performance</td>
<td>203</td>
<td>34.0%</td>
</tr>
<tr>
<td>3</td>
<td>Visit an Aboriginal cultural centre</td>
<td>164</td>
<td>27.4%</td>
</tr>
<tr>
<td>4</td>
<td>Visit an Aboriginal gallery</td>
<td>155</td>
<td>26.0%</td>
</tr>
<tr>
<td>5</td>
<td>Purchase Aboriginal art, craft or souvenirs</td>
<td>122</td>
<td>20.4%</td>
</tr>
<tr>
<td>6</td>
<td>See an Aboriginal site or Aboriginal community</td>
<td>118</td>
<td>19.7%</td>
</tr>
<tr>
<td>7</td>
<td>Some other interaction with Aboriginal people</td>
<td>87</td>
<td>14.6%</td>
</tr>
<tr>
<td>8</td>
<td>Go on a tour with an Aboriginal guide</td>
<td>56</td>
<td>9.4%</td>
</tr>
<tr>
<td>9</td>
<td>Attend an Aboriginal festival</td>
<td>12</td>
<td>2.0%</td>
</tr>
<tr>
<td>10</td>
<td>Stay in Aboriginal accommodation</td>
<td>6</td>
<td>1.1%</td>
</tr>
</tbody>
</table>

Origin

<table>
<thead>
<tr>
<th>Rank</th>
<th>Origin market</th>
<th>International visitors ('000)</th>
<th>%</th>
<th>International nights ('000)</th>
<th>%</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>United Kingdom</td>
<td>94</td>
<td>15.8%</td>
<td>2,404</td>
<td>16.3%</td>
<td>25.5</td>
</tr>
<tr>
<td>2</td>
<td>USA</td>
<td>93</td>
<td>15.6%</td>
<td>1,406</td>
<td>9.5%</td>
<td>15.1</td>
</tr>
<tr>
<td>3</td>
<td>Mainland China</td>
<td>70</td>
<td>11.8%</td>
<td>1,569</td>
<td>10.6%</td>
<td>22.3</td>
</tr>
<tr>
<td>4</td>
<td>Germany</td>
<td>39</td>
<td>6.5%</td>
<td>827</td>
<td>5.6%</td>
<td>21.3</td>
</tr>
<tr>
<td>5</td>
<td>New Zealand</td>
<td>31</td>
<td>5.2%</td>
<td>444</td>
<td>3.0%</td>
<td>14.2</td>
</tr>
<tr>
<td>Other Asian markets (3)</td>
<td>108</td>
<td>18.1%</td>
<td>3,562</td>
<td>21.4%</td>
<td>33.1</td>
<td></td>
</tr>
<tr>
<td>Other European markets (4)</td>
<td>111</td>
<td>18.6%</td>
<td>3,342</td>
<td>22.6%</td>
<td>30.1</td>
<td></td>
</tr>
<tr>
<td>All other countries</td>
<td>50</td>
<td>8.4%</td>
<td>1,228</td>
<td>8.3%</td>
<td>24.6</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>597</td>
<td></td>
<td>14,783</td>
<td></td>
<td>24.8</td>
</tr>
</tbody>
</table>

The United Kingdom (15.8%) was the largest individual source market of international Aboriginal tourism participants to NSW, followed by the USA (15.6%) and Mainland China (11.8%).

The United Kingdom (16.3%) was the biggest individual contributor of nights in the State, followed by Mainland China (10.6%) and the USA (9.5%).

Average stay

International Aboriginal tourism participants stayed an average of 24.8 nights in NSW. This was longer than the average for all visitors to the State (24 nights). Aboriginal tourism participants from Taiwan (60.7 nights) had the longest average stay in the State, followed by Koreans (48.7 nights) and French visitors (41.3 nights).

Participation rate

Visitors from the Netherlands (38.1%) had the highest Aboriginal activities participation rate in NSW, followed by Germans (33.9%) and visitors from Italy (33.7%). Taiwanese visitors who had been to the State had the highest participation rate amongst Asian markets (19.9%).

Purpose of visit

‘Holiday / pleasure’ (75.5%) was the largest purpose of visit for international Aboriginal tourism participants to the State, followed by ‘visiting friends and relatives’ (20.6%) and ‘business’ (6.0%).

Accommodation

‘Rented house / apartment / unit / flat’ (37.7%) was the most popular accommodation type used for international Aboriginal tourism nights in NSW.

---

1. Source: Aboriginal supplementary sections of the International Visitor Survey and the National Visitor Survey, YE Sep 14, Tourism Research Australia.
2. The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.
3. The percentage change is statistically significant.
International Market continued

Destinations in NSW

<table>
<thead>
<tr>
<th>Region</th>
<th>International visitors ('000)</th>
<th>%</th>
<th>International nights ('000)</th>
<th>%</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>575</td>
<td>96.3%</td>
<td>12,205</td>
<td>82.6%</td>
<td>21.2</td>
</tr>
<tr>
<td>Blue Mountains</td>
<td>32</td>
<td>5.3%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Capital Country</td>
<td>6</td>
<td>1.0%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Central Coast</td>
<td>6</td>
<td>0.9%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Central NSW</td>
<td>7</td>
<td>1.2%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Hunter</td>
<td>30</td>
<td>5.0%</td>
<td>476</td>
<td>3.2%</td>
<td>15.9</td>
</tr>
<tr>
<td>New England North West</td>
<td>7</td>
<td>1.2%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>North Coast NSW</td>
<td>84</td>
<td>14.1%</td>
<td>853</td>
<td>5.8%</td>
<td>10.1</td>
</tr>
<tr>
<td>Outback NSW</td>
<td>4</td>
<td>0.7%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Riverina</td>
<td>4</td>
<td>0.7%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Snowy Mountains</td>
<td>4</td>
<td>0.7%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>South Coast NSW</td>
<td>28</td>
<td>4.6%</td>
<td>298</td>
<td>2.0%</td>
<td>10.8</td>
</tr>
<tr>
<td>The Murray</td>
<td>5</td>
<td>0.8%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Total</td>
<td>597</td>
<td>14,783</td>
<td>24.8</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- = estimate considered statistically unreliable

International visitors International nights

- Travel agent
- Online website
- Directly with a tour operator
- Friends or relatives
- Travel book or guide

% of international visitors

<table>
<thead>
<tr>
<th>% of international visitors</th>
<th>50.0%</th>
<th>45.0%</th>
<th>40.0%</th>
<th>35.0%</th>
<th>30.0%</th>
<th>25.0%</th>
<th>20.0%</th>
<th>15.0%</th>
<th>10.0%</th>
<th>5.0%</th>
<th>0.0%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alone</td>
<td>44.0%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adult couple</td>
<td>26.4%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Family group</td>
<td>12.7%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Friends and / or relatives</td>
<td>14.5%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Business associates</td>
<td>1.6%</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

‘Sydney’ (96.3%) had by far the highest proportion of international visitors who engaged in an Aboriginal activity.

Transport

‘Aircraft’ (47.2%) was the most common transport used to destinations in NSW by international Aboriginal tourism participants. ‘Private or company car’ (21.6%) was the 2nd most common, followed by ‘taxi or chauffeur driven hire car’ (14.8%).

Return visitors

One third (33.3%) of international Aboriginal tourism participants to the State were on a return visit to Australia – a lower % than for all visitors to the State (52.1%).

Package tours

One quarter (25.0%) of international Aboriginal tourism participants to NSW arrived in Australia on a travel package – a higher % than for all visitors to the State (17.8%).

Group tours

The rate of group tour travel to Australia amongst international Aboriginal tourism participants who had been to NSW was 12.6% – a higher % than for all visitors to the State (11.1%).

Travel party

‘Alone’ (44.0%) was the most common travel party of international Aboriginal tourism participants to NSW.

Information sources

‘Travel agent’ (26.0%) was the most popular information source about Aboriginal activities for international Aboriginal tourism participants who had been to NSW. Nearly ½ (48.9%) of them obtained this information during the trip to Australia, while 27.0% obtained information before the trip.

Of those who had booked at least one of the activities, over 2/5 (42.8%) booked through a travel agent. ‘Online website’ (19.5%) was the 2nd most popular booking method, followed by ‘email with operator’ (17.2%).

Gender

More international Aboriginal tourism participants who had been to the State were female (54.5%) than male (45.5%).

Age

‘25 to 34 years’ (26.1%) was the biggest age group of international Aboriginal tourism participants to NSW. ‘15 to 24 years’ (21.1%) was the 2nd biggest age group, followed by ‘55 to 64 years’ (15.0%).

Seasonality

NSW received the most international Aboriginal tourism participants in the December quarter (30.0%).

Expenditure (incl 30% of prepaid package expenditure)\(^2\)

International Aboriginal tourism participants spent an estimated $1.4 billion in NSW - down by 2.7% on YE Sep 13. On average, those who had been to the State spent $2,346 per visitor and $95 per night.

(\(^2\) Total expenditure on the trip, including Aboriginal activity spend. )

Experienced or learnt

<table>
<thead>
<tr>
<th>Rank</th>
<th>Experienced or learnt about</th>
<th>International visitors ('000)</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Aboriginal art / craft</td>
<td>228</td>
<td>43.1%</td>
</tr>
<tr>
<td>2</td>
<td>Aboriginal music</td>
<td>201</td>
<td>37.9%</td>
</tr>
<tr>
<td>3</td>
<td>Aboriginal weapons</td>
<td>172</td>
<td>32.4%</td>
</tr>
<tr>
<td>4</td>
<td>Aboriginal dancing / performance</td>
<td>143</td>
<td>27.0%</td>
</tr>
<tr>
<td>5</td>
<td>Aboriginal rock art / carvings</td>
<td>127</td>
<td>24.0%</td>
</tr>
<tr>
<td>6</td>
<td>Aboriginal hunting and gathering</td>
<td>117</td>
<td>22.3%</td>
</tr>
<tr>
<td>7</td>
<td>Aboriginal dreamtime</td>
<td>103</td>
<td>19.4%</td>
</tr>
<tr>
<td>8</td>
<td>Aboriginal bush tucker</td>
<td>87</td>
<td>16.5%</td>
</tr>
</tbody>
</table>

Over 2/5 (43.1%) of international Aboriginal tourism participants who had been to NSW had experienced or learnt about ‘Aboriginal art / craft’.

---

\(^1\) Source: Aboriginal supplementary sections of the International Visitor Survey and the National Visitor Survey, YE Sep 14, Tourism Research Australia.

The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.
Domestic Market

The information in this section relates to domestic overnight visitors who participated in an Aboriginal activity during their trip, but not necessarily in a particular State or region.

Visitors and nights

NSW received more than 826,000 domestic Aboriginal tourism participants - up by 6.4% on YE Sep 13. They spent over 3.7 million nights in the State - up by 8.0% on YE Sep 13.

Market share

Aboriginal tourism participants represented 3.1% of visitors and 4.3% of nights by domestic travellers to NSW. Compared with YE Sep 13, the share of visitors was up by 0.1% pt and the share of nights was up by 0.3% pts.

The State received 32.9% of visitors and 21.7% of nights by Aboriginal tourism participants in Australia. Compared with YE Sep 13, the share of visitors was up by 3.2% pts and the share of nights was up by 1.9% pts.

Expenditure (excl motor vehicles)(2)

Domestic Aboriginal tourism participants spent an estimated $1.0 billion in NSW - up by 18.6% on YE Sep 13. On average, those who had been to the State spent $1,233 per visitor and $274 per night.

(2) Total expenditure on the trip, including Aboriginal activity spend.

Type of Aboriginal activity

Source: Aboriginal supplementary sections of the International Visitor Survey and the National Visitor Survey, YE Sep 14, Tourism Research Australia.

The information in this report is sourced from sample surveys, hence the results are subject to sampling variability.

* The percentage change is statistically significant.
Domestic Market continued

Information sources

The ‘internet’ (56.0%) was the most popular information source for the trip in Australia by domestic Aboriginal tourism participants who had been to NSW. ‘Previous visit’ (34.9%) was the 2nd most popular, followed by ‘friends or relatives’ (22.6%).

Nearly 2/5 (39.0%) had booked at least part of the trip on the internet.

Gender

More domestic Aboriginal tourism participants to NSW were female (55.8%) than male (44.2%).

Age

‘55 to 64 years’ (23.1%) was the biggest age group of domestic Aboriginal tourism participants to NSW. ‘45 to 54 years’ (22.1%) was the 2nd biggest age group, followed by ‘25 to 34 years’ (16.8%).

Experienced or learnt

Nearly 1/3 (33.0%) of domestic Aboriginal tourism participants who had been to NSW had experienced or learnt about ‘Aboriginal art / craft’. ‘Aboriginal rock art / carvings’ (21.1%) was the 2nd most popular aspect experienced or learnt about, followed by ‘Aboriginal hunting and gathering’ (20.2%).

Domestic daytrips

The National Visitor Survey does not contain supplementary questions on Aboriginal activities, nor does it contain sufficient sample size to provide information on the standard activities questions relating to Aboriginal tourism.

Definition

Aboriginal tourism visitors to NSW are those who visited NSW and participated in an Aboriginal activity in Australia (referred to as Aboriginal tourism participants).