Overview

NSW received nearly 9.8 million international and domestic cultural and heritage visitors - up by 2.8% on YE Dec 12. Visitors spent nearly 59.8 million nights in the State - up by 5.0% on YE Dec 12.

Cultural and heritage visitors spent an estimated $8.3 billion (incl package expenditure by overseas visitors) in NSW - up by 4.7% on YE Dec 12.

(1) Source: International Visitor Survey, YE Dec 13, Tourism Research Australia
(2) Source: National Visitor Survey, YE Dec 13, Tourism Research Australia

International Market

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 over 1.7 million international cultural and heritage visitors - up by 4.8% on YE Dec 12. They spent nearly 46.0 million nights in the State - up by 6.3% on YE Dec 12.

Market share

Cultural and heritage travellers represented 58.2% of visitors and 63.1% of nights by all international travellers to NSW. Compared with YE Dec 12, the share of visitors was down by 0.5% pts and the share of nights was up by 0.3% pts.

The State received 60.8% of visitors and 33.3% of nights by cultural and heritage travellers in Australia. Compared with YE Dec 12, the share of visitors was down by 0.3% pts and the share of nights was up by 0.5% pts.

Type of cultural and heritage activity

‘Visit history / heritage buildings, sites or monuments’ (61.9%) was the most popular cultural and heritage activity undertaken by international visitors who had been to NSW. ‘Visit museum or art galleries’ (59.7%), was the 2nd most popular.

Origin

Mainland China (13.6%) was the largest individual source market of international cultural and heritage visitors to NSW, followed by the United Kingdom (12.4%) and the USA (10.8%).

Mainland China (12.3%) was the biggest individual contributor of nights in the State, followed by the United Kingdom (12.0%) and Korea (8.1%).

Average stay

International cultural and heritage visitors stayed an average of 26.3 nights in NSW. This was longer than the average for all visitors to the State (24.2 nights). Visitors from Ireland (53.1 nights) had the longest average stay in NSW, followed by visitors from Thailand (51.6 nights) and other Asia (48 nights).

Seasonality

NSW received the most international cultural and heritage visitors and nights in the March quarter (28.4% and 30.0% respectively).

Expenditure

International cultural and heritage visitors spent an estimated $4.2 billion (incl package expenditure) in NSW - up by 6.2% on YE Dec 12. On average, visitors who had been to NSW spent $2,431 per visitor and $92 per night.

(5) Including 30% of prepaid package expenditure.

Accommodation

‘Rented house / apartment / unit / flat’ (45.7%) was the most popular accommodation type used for international cultural and heritage nights in NSW. ‘Home of a friend or relative’ (23.6%) was the 2nd most popular.
International Market continued

## Destinations in NSW

<table>
<thead>
<tr>
<th>Region</th>
<th>Visitors (’000)</th>
<th>%</th>
<th>Nights (’000)</th>
<th>%</th>
<th>Average stay (nights)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sydney</td>
<td>1,665</td>
<td>59.1%</td>
<td>39,247</td>
<td>63.8%</td>
<td>23.6</td>
</tr>
<tr>
<td>Blue Mountains</td>
<td>63</td>
<td>79.6%</td>
<td>341</td>
<td>76.8%</td>
<td>5.4</td>
</tr>
<tr>
<td>Capital Country</td>
<td>17</td>
<td>70.6%</td>
<td>332</td>
<td>71.4%</td>
<td>19.3</td>
</tr>
<tr>
<td>Central Coast</td>
<td>22</td>
<td>51.3%</td>
<td>381</td>
<td>59.4%</td>
<td>17.7</td>
</tr>
<tr>
<td>Central NSW</td>
<td>20</td>
<td>58.5%</td>
<td>424</td>
<td>67.6%</td>
<td>21.3</td>
</tr>
<tr>
<td>The Hunter</td>
<td>64</td>
<td>56.3%</td>
<td>976</td>
<td>49.1%</td>
<td>15.2</td>
</tr>
<tr>
<td>The Murray</td>
<td>13</td>
<td>60.7%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>New England North West</td>
<td>24</td>
<td>67.4%</td>
<td>573</td>
<td>58.0%</td>
<td>23.9</td>
</tr>
<tr>
<td>North Coast region</td>
<td>192</td>
<td>71.1%</td>
<td>1,963</td>
<td>64.3%</td>
<td>10.2</td>
</tr>
<tr>
<td>Outback NSW</td>
<td>9</td>
<td>85.2%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Riverina</td>
<td>14</td>
<td>61.8%</td>
<td>314</td>
<td>56.5%</td>
<td>22.6</td>
</tr>
<tr>
<td>Snowy Mountains</td>
<td>15</td>
<td>72.3%</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>South Coast region</td>
<td>74</td>
<td>66.7%</td>
<td>1,008</td>
<td>52.9%</td>
<td>13.5</td>
</tr>
<tr>
<td>Total</td>
<td>1,747</td>
<td>58.2%</td>
<td>45,975</td>
<td>63.1%</td>
<td>26.3</td>
</tr>
</tbody>
</table>

* = estimate considered statistically unreliable

‘Outback NSW’ (85.2%) had the highest proportion of international visitors who engaged in a cultural and heritage activity. ‘Blue Mountains’ (79.6%) had the 2nd highest proportion, followed by ‘Snowy Mountains’ (72.3%).

‘Blue Mountains’ (76.8%) had the highest proportion of nights spent by cultural and heritage visitors, followed by ‘Capital Country’ (71.4%) and ‘Central NSW’ (67.6%).

### Transport

‘Aircraft’ (38.3%) was the most common transport used to destinations in NSW by international cultural and heritage visitors. ‘Private or company car’ (23.1%) was the 2nd most common, followed by ‘local public transport’ (16.7%).

### Travel party

‘Alone’ (47.6%) was the most common travel party of international cultural and heritage visitors to NSW. ‘Adult couple’ (23.2%) was the 2nd most common, followed by ‘friends or relatives’ (12.7%).

### Package tours

Nearly ¼ (22.9%) of international cultural and heritage visitors to NSW, arrived in Australia on a travel package. ‘All accommodation’ (83.6%) was the most popular travel arrangement included in the package (other than ‘international airfares’), followed by ‘most ground transport within Australia’ (71.2%) and ‘airfares within Australia’ (67.0%).

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

* The percentage change is statistically significant.

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The ‘internet’ (53.4%) was the most popular information source for the trip to Australia by cultural and heritage visitors who had been to NSW. ‘Friend or relative living in Australia’ (27.2%) was the 2nd most popular.

Of those international cultural and heritage visitors to NSW, who had used the internet for this visit to Australia, nearly 3/5 (59.2%) had booked at least part of the trip on the internet.

### Return visitors

Over 2/5 (40.1%) 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 (52.1%).

### Group tours

The rate of group tour travel to Australia amongst international cultural and heritage visitors who had been to NSW was 14.2%.

### Gender

More international cultural and heritage visitors who had been to NSW were females (54.4%) than males (45.6%).

### Age

Aged ‘25-34 years’ (27.4%) was the biggest age group of international cultural and heritage visitors to NSW. ‘15-24 years’ (20.1%) was the 2nd biggest age group.

‘25-34 years’ was the largest age group for each type of cultural and heritage activity.
Domestic Market\(^{(2)}\)

The information in this section relates to domestic visitors who engaged in a cultural and heritage activity in NSW. Domestic overnight visitors and domestic daytrips are shown separately.

Visitors and nights

NSW received nearly 3.9 million domestic overnight cultural and heritage visitors - up by 7.6%* on YE Dec 12. They spent 13.8 million nights in the State - up by 0.9% on YE Dec 12.

Market share

Cultural and heritage travellers represented 15.1% of visitors and 16.1% of nights by domestic overnight travellers to NSW. Compared with YE Dec 12, the share of visitors was up by 0.6% pts and the share of nights was down by 0.2% pts.

The State received 30.8% of visitors and 27.9% of nights by cultural and heritage travellers in Australia. Compared with YE Dec 12, the share of visitors was down by 1.3% pts and the share of nights was down by 1.8% pts.

Expenditure

Domestic overnight cultural and heritage visitors to NSW spent an estimated $3.5 billion (incl airfares and transport costs) during their trip - up by 4.7% on YE Dec 12. On average, visitors spent $898 per visitor and $252 per night in NSW.

Origin

NSW received 60.2% of domestic overnight cultural and heritage visitors from intrastate and 39.8% from interstate. Regional NSW (35.9%) was the biggest source market, while Victoria (12.8%) was the biggest interstate market.

Intrastate contributed 52.5% of cultural and heritage visitor nights in the State, while interstate contributed 47.5%. Regional NSW (28.1%) was the biggest source market, while Queensland (15.7%) was the biggest interstate market.

Please note: 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

Age

<table>
<thead>
<tr>
<th>Cultural and heritage activity</th>
<th>15-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-65</th>
<th>65+</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
<td>%</td>
</tr>
<tr>
<td>Attend theatre, concerts or other performing arts</td>
<td>22.7%</td>
<td>18.5%</td>
<td>11.5%</td>
<td>15.5%</td>
<td>15.3%</td>
<td>16.3%</td>
</tr>
<tr>
<td>Visit museums or art galleries</td>
<td>10.5%</td>
<td>12.6%</td>
<td>14.2%</td>
<td>20.0%</td>
<td>20.1%</td>
<td>22.7%</td>
</tr>
<tr>
<td>Visit art / craft workshops / studios</td>
<td>7.2%</td>
<td>0.0%</td>
<td>14.4%</td>
<td>18.7%</td>
<td>33.8%</td>
<td>26.6%</td>
</tr>
<tr>
<td>Attend festivals / fairs or cultural events</td>
<td>15.2%</td>
<td>20.0%</td>
<td>17.7%</td>
<td>17.8%</td>
<td>13.4%</td>
<td>15.8%</td>
</tr>
<tr>
<td>Experience aboriginal art / craft and cultural displays</td>
<td>8.2%</td>
<td>32.8%</td>
<td>18.0%</td>
<td>18.0%</td>
<td>16.4%</td>
<td>8.2%</td>
</tr>
<tr>
<td>Visit an aboriginal site / community</td>
<td>0.0%</td>
<td>33.3%</td>
<td>18.5%</td>
<td>37.0%</td>
<td>5.6%</td>
<td>5.6%</td>
</tr>
<tr>
<td>Visit history / heritage buildings, sites or monuments</td>
<td>14.1%</td>
<td>12.1%</td>
<td>15.8%</td>
<td>18.8%</td>
<td>18.4%</td>
<td>20.6%</td>
</tr>
<tr>
<td>All cultural and heritage visitors</td>
<td>15.1%</td>
<td>14.6%</td>
<td>15.4%</td>
<td>18.5%</td>
<td>17.1%</td>
<td>19.4%</td>
</tr>
</tbody>
</table>

Aged ‘65 years+’ (19.4%) was the biggest age group of domestic overnight cultural and heritage visitors to NSW. ‘45-54 years’ (18.5%) was the 2nd biggest age group.

Transport

‘Private or company vehicle’ (68.2%) was the most common transport used to destinations in NSW by domestic overnight cultural and heritage visitors. ‘Air transport’ (19.7%) was the 2nd most common, followed by ‘railway’ (5.7%).

Seasonality

NSW received the most domestic overnight cultural and heritage visitors in the June quarter (28.6%), while the March quarter (27.2%) had the most nights.

Gender

More domestic overnight cultural and heritage visitors to NSW were females (55.9%) than males (44.1%).

Information sources

<table>
<thead>
<tr>
<th>% of visitors</th>
<th>Internet</th>
<th>Previous Visit</th>
<th>Friends or relatives</th>
<th>Travel book guide or brochure</th>
<th>Advertising / Travel articles or documentaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>%</td>
<td>55.4%</td>
<td>29.8%</td>
<td>20.6%</td>
<td>3.4%</td>
<td>2.2%</td>
</tr>
</tbody>
</table>

The ‘internet’ (55.4%) was the most popular information source for the trip in Australia by domestic overnight cultural and heritage visitors who had been to NSW.

Of those domestic overnight cultural and heritage visitors to NSW, who had used the internet for this trip in Australia, nearly ¾ (70.3%) had booked at least part of the trip on the internet.

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

* The percentage change is statistically significant.

Daytrips

NSW received over 4.1 million domestic daytrip cultural and heritage visitors - down by 2.1% on YE Dec 12.

Market share - daytrips

Cultural and heritage day-trippers represented 8.0% of domestic daytrip visitors to NSW. Compared with YE Dec 12, the share was up by 0.3% pts.

The State received 35.9% of cultural and heritage daytrip travellers in Australia. Compared with YE Dec 12, the share was down by 0.9% pts.

Expenditure on daytrips

Domestic daytrip cultural and heritage visitors to NSW spent an estimated $556 million during their trip - down by 4.9% on YE Dec 12. On average, visitors spent $135 per trip in NSW.

Type of cultural and heritage activity

‘Visit museums or art galleries’ (33.6%) was the most popular cultural and heritage activity undertaken by domestic daytrip visitors to NSW. ‘Visit history, heritage building sites or monuments’ (33.3%) was the 2nd most popular.

Definition

# A cultural and heritage visitor participates 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: a visitor may also participate in other activities.