

## Overview

NSW received nearly 9.8 million international<sup>(1)</sup> and domestic<sup>(2)</sup> 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.

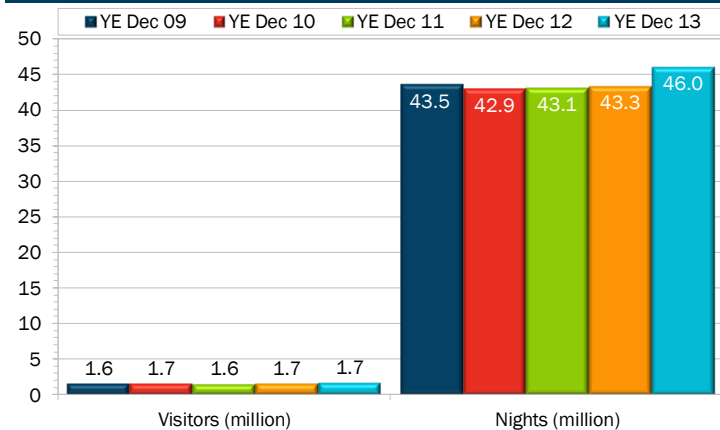
<sup>(1)</sup> Source: International Visitor Survey, YE Dec 13, Tourism Research Australia

<sup>(2)</sup> Source: National Visitor Survey, YE Dec 13, Tourism Research Australia

## International Market<sup>(1)</sup>

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

Rank	Cultural and heritage activity	Visitors	
		('000)	%
1	Visit history / heritage buildings, sites or monuments	1,082	61.9%
2	Visit museums or art galleries	1,043	59.7%
3	Attend theatre, concerts or other performing arts	380	21.7%
4	Attend festivals / fairs or cultural events	371	21.2%
5	Experience aboriginal art / craft and cultural displays	326	18.7%
6	Visit art / craft workshops / studios	224	12.8%
7	Visit an aboriginal site / community	196	11.2%

'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 2<sup>nd</sup> most popular.

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.

## Origin

Rank	Market	Visitors		Nights		Average stay (nights)
		('000)	%	('000)	%	
1	Mainland China	237	13.6%	5,640	12.3%	23.8
2	United Kingdom	216	12.4%	5,504	12.0%	25.5
3	USA	188	10.8%	3,106	6.8%	16.5
4	New Zealand	122	7.0%	1,609	3.5%	13.1
5	Korea	121	6.9%	3,731	8.1%	30.8
	Other Asian markets (3)	403	23.1%	12,160	26.4%	30.1
	Other European markets (4)	315	18.0%	10,158	22.1%	32.3
	All other countries	145	8.3%	4,067	8.8%	28.1
	Total	1,747		45,975		26.3

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%).

<sup>(3)</sup> All Asian markets, excluding Mainland China and Korea.

<sup>(4)</sup> All European markets, excluding United Kingdom.

### 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

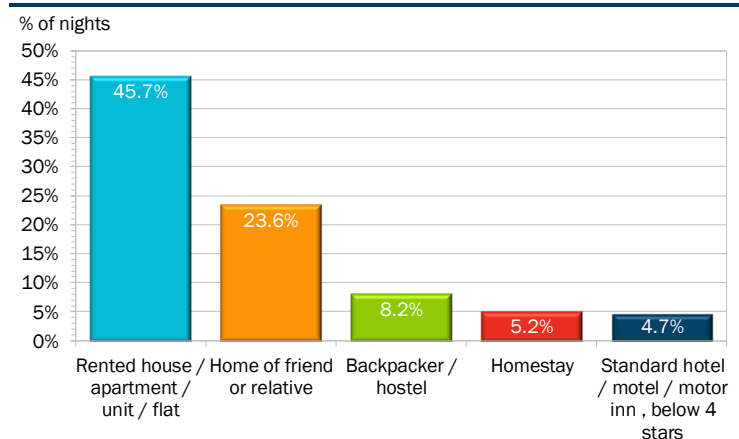
NSW received the most international cultural and heritage visitors and nights in the March quarter (28.4% and 30.0% respectively).

### Expenditure<sup>(5)</sup>

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.

<sup>(5)</sup> 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 2<sup>nd</sup> most popular.

## International Market continued

### Destinations in NSW

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

- = estimate considered statistically unreliable

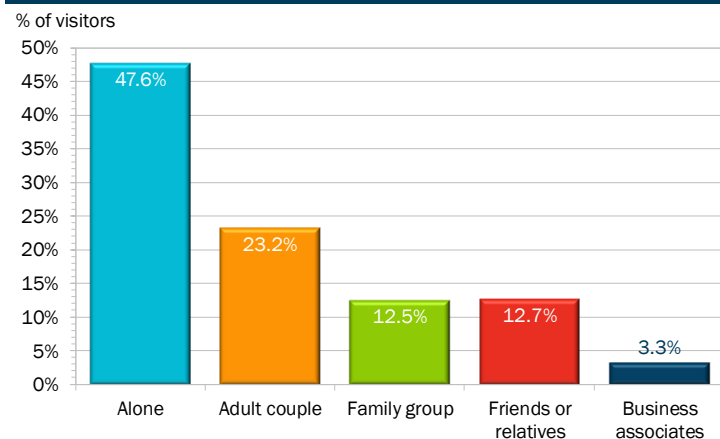
'Outback NSW' (85.2%) had the highest proportion of international visitors who engaged in a cultural and heritage activity. 'Blue Mountains' (79.6%) had the 2<sup>nd</sup> highest proportion, followed by 'Snowy Mountains' (72.3%).

'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 2<sup>nd</sup> most common, followed by 'local public transport' (16.7%).

### Travel party

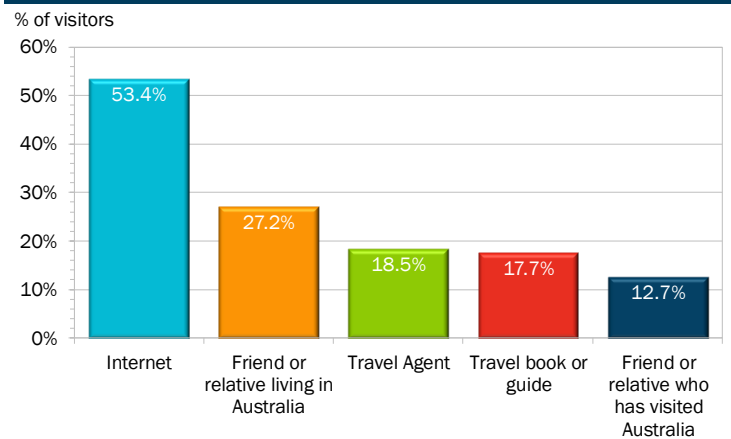


'Alone' (47.6%) was the most common travel party of international cultural and heritage visitors to NSW. 'Adult couple' (23.2%) was the 2<sup>nd</sup> most common, followed by 'friends or relatives' (12.7%).

### Package tours

Nearly 1/4 (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%).

### Information sources



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 2<sup>nd</sup> 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

	15-24 years	25-34 years	35-44 years	45-54 years	55-65 years	65 years+
<b>Cultural and heritage activity</b>	%	%	%	%	%	%
Attend theatre, concerts or other performing arts	24.3%	30.3%	12.0%	12.1%	12.1%	9.2%
Visit museums or art galleries	21.7%	27.6%	14.3%	13.5%	14.4%	8.6%
Visit art / craft workshops / studios	20.2%	27.4%	14.1%	12.8%	14.6%	11.0%
Attend festivals / fairs or cultural events	30.6%	35.9%	10.1%	9.4%	7.9%	6.2%
Experience aboriginal art / craft and cultural displays	23.3%	29.0%	13.2%	12.3%	13.1%	9.1%
Visit an aboriginal site / community	26.3%	29.4%	12.2%	11.0%	10.6%	10.5%
Visit history / heritage buildings, sites or monuments	18.7%	27.1%	15.2%	15.4%	15.4%	8.3%
<b>All cultural and heritage visitors</b>	<b>20.1%</b>	<b>27.4%</b>	<b>14.7%</b>	<b>14.9%</b>	<b>14.4%</b>	<b>8.5%</b>

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 2<sup>nd</sup> biggest age group.

'25-34 years' was the largest age group for each type of cultural and heritage activity.

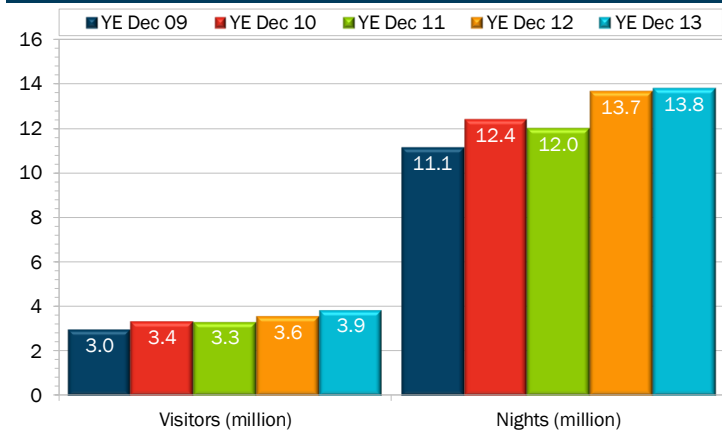
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\* The percentage change is statistically significant.

## Domestic Market<sup>(2)</sup>

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

Market	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Regional NSW	1,389	35.9%	3,881	28.1%	2.8
Sydney	939	24.3%	3,361	24.3%	3.6
Intrastate	2,328	60.2%	7,242	52.5%	3.1
Victoria	494	12.8%	2,035	14.7%	4.1
Queensland	472	12.2%	2,163	15.7%	4.6
ACT	296	7.7%	856	6.2%	2.9
Other interstate	279	7.2%	1,511	10.9%	5.4
Total interstate	1,541	39.8%	6,565	47.5%	4.3
Total	3,869		13,807		3.6

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.

## Destinations in NSW

Region	Visitors		Nights		Average stay (nights)
	('000)	%	('000)	%	
Sydney	1,630	19.6%	4,536	20.4%	2.8
Blue Mountains	156	21.1%	477	24.8%	3.1
Capital Country	152	13.7%	543	20.5%	3.6
Central Coast	63	4.8%	-	-	-
Central NSW	235	13.0%	610	11.9%	2.6
The Hunter	230	11.0%	607	12.1%	2.6
The Murray	137	13.8%	-	-	-
New England North West	143	11.7%	489	13.8%	3.4
North Coast region	596	12.0%	2,798	14.1%	4.7
Outback NSW	94	26.7%	-	-	-
Riverina	110	12.1%	-	-	-
Snowy Mountains	77	11.0%	426	16.9%	5.5
South Coast region	392	12.0%	1,936	15.9%	4.9
Total	3,869	15.1%	13,807	16.1%	3.6

- = estimate considered statistically unreliable

'Outback NSW' (26.7%) had the highest proportion of domestic overnight visitors who engaged in a cultural and heritage activity. 'Blue Mountains' (21.1%) had the 2<sup>nd</sup> highest proportion, followed by 'Sydney' (19.6%).

'Blue Mountains' (24.8%) had the highest proportion of nights spent by cultural and heritage visitors, followed by 'Capital Country' (20.5%) and 'Sydney' (20.4%).

### Average stay

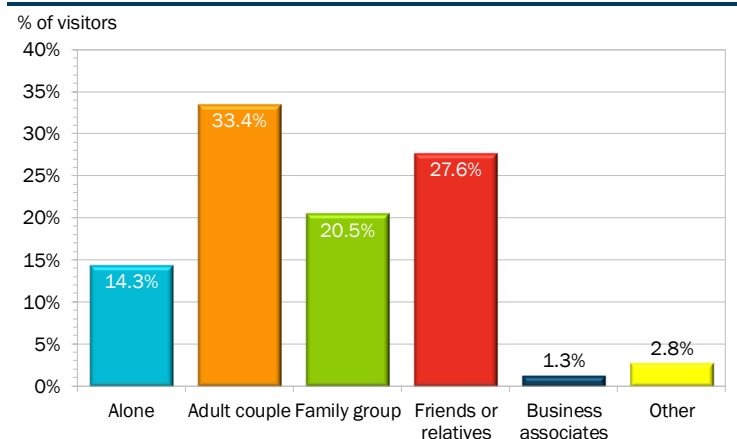
Domestic cultural and heritage visitors stayed, on average, 3.6 nights in NSW. This was longer than the average for all visitors to the State (3.3 nights).

Interstate visitors to NSW stayed 1.2 nights longer than intrastate visitors (4.3 vs 3.1 nights).

### Accommodation

'Friends or relatives property' (32.1%) was the most popular accommodation type used for domestic cultural and heritage visitor nights in NSW. 'Standard hotel, motor inn, below 4 star' (16.6%) was the 2<sup>nd</sup> most popular, followed by 'caravan park or commercial camping ground' (14.3%).

### Travel party



'Adult couple' (33.4%) was the most common travel party of domestic overnight cultural and heritage visitors to NSW. 'Friends or relatives' (27.6%) was the 2<sup>nd</sup> most common, followed by 'family group' (20.5%).

## Domestic Market continued

### Age

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

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 2<sup>nd</sup> 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 2<sup>nd</sup> most common, followed by 'railway' (5.7%).

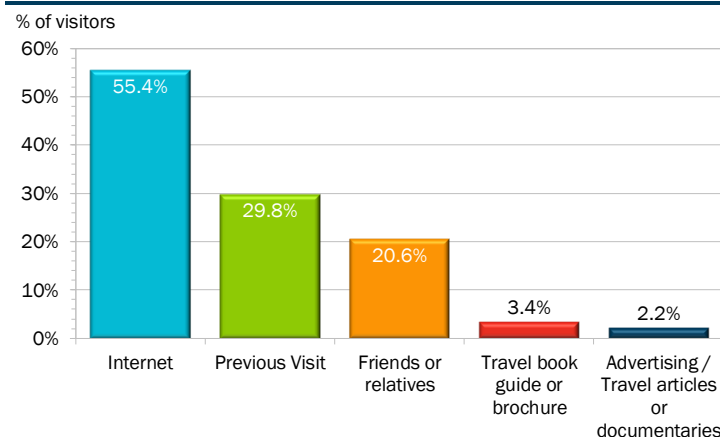
### Seasonality

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



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.

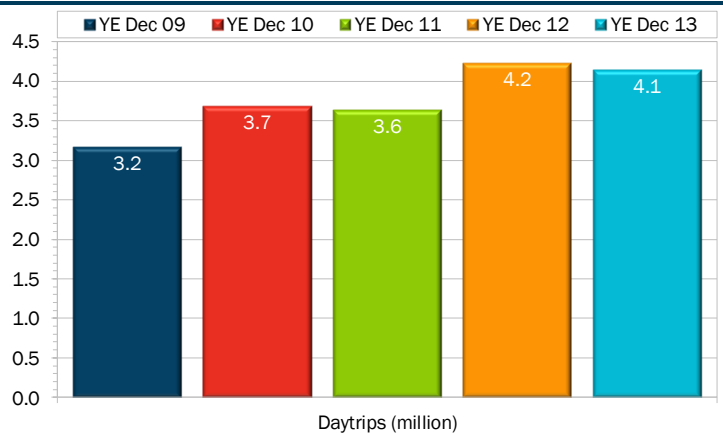
## Type of cultural and heritage activity

Rank	Cultural and heritage activity	Visitors ('000)	%
1	Visit museums or art galleries	1,568	40.5%
2	Visit history, heritage buildings sites or monuments	1,290	33.3%
3	Attend theatre concerts or other performing arts	858	22.2%
4	Attend festivals or fairs or cultural events	774	20.0%
5	Visit art or craft workshops or studios	139	3.6%
6	Experience aboriginal art or craft and cultural displays	61	1.6%
7	Visit an aboriginal site or community	54	1.4%

- = estimate considered statistically unreliable

'Visit museums or art galleries' (40.5%) was the most popular cultural and heritage activity undertaken by domestic overnight visitors to NSW. 'Visit history, heritage building sites or monuments' (33.3%) was the 2<sup>nd</sup> most popular.

### 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 on daytrips

'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' (25.2%) was the 2<sup>nd</sup> 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.