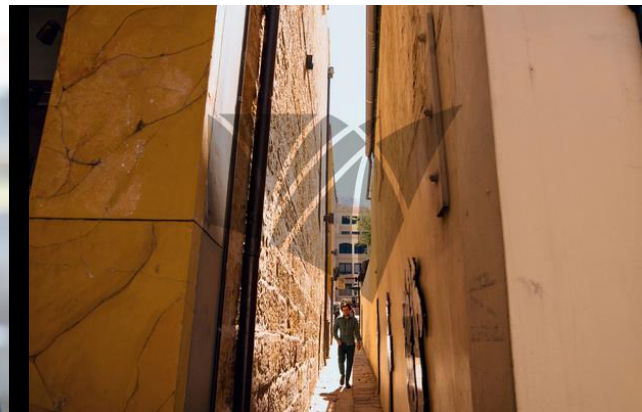


This snapshot provides a profile of culture and heritage based visitors¹ to New South Wales in the year ended (YE) December 2018.²

As defined by Ted Silberberg, cultural and heritage tourism is ‘a tool of economic development that achieves economic growth through attracting visitors from outside a host community, who are motivated wholly or in part by interest in the historical, artistic, scientific or lifestyle/heritage offerings of a community, region, group or institution’³. Research conducted by Tourism Australia⁴ found that ‘rich history and heritage’ was the 4th most important factor for the Domestic market when choosing a holiday destination, and 6th most important for the International market. The same research found that the International market associated Sydney as the top Australian destination for ‘history and heritage’.



Overview

In the YE December 2018, the total number of International⁵, Domestic overnight and Daytrip culture and heritage based visitors to NSW was 13.6 million. Of these, 20% were from Overseas, 40% were from the Domestic overnight market and 40% were Domestic Daytrip visitors. Culture and heritage visitors accounted for 63% of International visitors to NSW, 15% of Domestic overnight visitors and 9% of Daytrip visitors to NSW.

NSW received 60% of International, 32% of Domestic overnight and 32% of Daytrip culture and heritage based visitors to Australia in the latest year.

Cultural and heritage visitors stayed 87.0 million nights and spent \$14.0 billion in NSW. International visitors stayed longer than Domestic overnight visitors in terms of average length of stay and hence, the average spend per visitor for International visitors were almost 3x that of Domestic overnight visitors. In terms of average spend per night, however, Domestic overnight culture and heritage based visitors spent much more per night than their International counterparts.

Table 1. Visitors, Nights and Expenditure

	Visitors (million)	Nights (million)	Average Length of Stay	Median Length of Stay	Total spend (\$ billion)	Spend per visitor	Spend per night
International	2.7	67.4	25 nights	5 nights	\$7.9	\$2,884	\$117
Domestic Overnight	5.4	19.6	4 nights	3 nights	\$5.3	\$990	\$271
Domestic Daytrip	5.5	-	-	-	\$0.8	\$140	-
TOTAL	13.6	87.0	-	-	\$14.0	\$1,032	\$161

¹ 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; attend Aboriginal performance (International visitors only).
Note: a visitor may also participate in other activities.

² Source: International Visitor Survey and National Visitor Survey, Year Ended December 18, Tourism Research Australia.

³ Source: Cultural Tourism and Business Opportunities for Museums and Heritage sites, Tourism Management, Ted Silberberg, 1995.

⁴ Source: Consumer Demand Project, Tourism Australia, 2018.

⁵ International visitors who engaged in cultural and heritage based activity in Australia, however not necessarily in NSW.



Table 2. Culture and Heritage based activities

	Share of Cultural and Heritage visitors		
	International Visitors	Domestic Overnight Visitors	Domestic Daytrip Visitors
Visit history / heritage buildings, sites or monuments	68%	37%	36%
Visit museums or art galleries	56%	36%	27%
Attend festivals / fairs or cultural events	23%	20%	20%
Attend theatre, concerts or other performing arts	17%	24%	21%
Experience aboriginal art / craft and cultural displays	16%	2%	1%
Visit art / craft workshops / studios	10%	4%	4%
Visit an aboriginal site / community	9%	1%	1%
Attend aboriginal performance	7%	-	-

Table 3. Regions visited

	International Visitors	Domestic Overnight Visitors	Domestic Daytrip Visitors
Sydney	95%	40%	44%
Regional NSW	21%	61%	56%
North Coast	9%	15%	11%
Hunter	5%	7%	np
South Coast	5%	9%	np
Blue Mountains	4%	4%	np
Central Coast	1%	np	np
Central NSW	1%	7%	np
New England North West	1%	4%	np
Capital Country	1%	5%	9%
The Murray	1%	3%	np
Snowy Mountains	1%	np	np
Riverina	0.5%	3%	np
Outback NSW	np	3%	np

np – not publishable

'Visit history/heritage buildings, sites or monuments' was the most common cultural and heritage activity undertaken by all visitors to NSW. The activity was notably more popular among International market than the Domestic market. 'Visit museums or art galleries' was second most popular activity undertaken in the State with noticeably higher participation rate shown by International visitors than their Domestic counterparts. Domestic culture and heritage based visitors visiting NSW were more likely to 'Attend theatre, concerts or other performing arts' while overseas visitors were more interested in participating in Aboriginal related activities.

Most International visitors to Sydney region participated in culture and heritage based activities while on their trip around Australia. It should be noted that the International figures do not include daytrips, hence regions close to large population centres such as Sydney are often visited by the International market as a daytrip e.g. Blue Mountains.

Domestic market did most of its culture and heritage based activities in Regional NSW, with the North Coast as the most popular destination for International and Domestic visitors alike.

International visitor profile

There were 2.7 million International visitors to NSW who took part in cultural and heritage activities during their trip in Australia (up 2.1% when compared to YE December 2017). They stayed 67.4 million nights (up 2.2%) and spent an estimated \$7.9 billion (up 3.5%).

- Culture and heritage based visitors accounted for 63% of all International visitors to NSW, 70% of nights and 74% of expenditure.
- They travelled to NSW mainly for the purpose of Holiday (69%) while a quarter came to Visit friends and relatives (25%), followed by Business and Education (6% each).
- The top five culture and heritage International visitors to NSW were China (18%), USA (12%), United Kingdom (9%), New Zealand and Korea (6% each). Visitors from Singapore and Switzerland recorded the strongest growth rates over the past year, each up 20%.
- Just under half of cultural and heritage International visitors to NSW (46%) were unaccompanied travellers (of those 44% were youth), 23% travelled as an adult couple (of those 61% were aged 50 years+), 14% with their family and 13% travelled with their friends and relatives.
- The youth market (15-29 years) accounted for 33% of culture and heritage International visitors to NSW. The second largest age group was 60 years+ (19%), followed by the 30-39 year olds (18%).
- Over half (58%) of all culture and heritage International visitors to NSW were first time visitors to Australia and 86% were fully independent travellers (i.e. did not join a group tour).
- Standard hotel/motor inn was the most popular type of accommodation utilised by cultural and heritage International visitors to NSW (28%), followed by friends or relatives properties (25%).



Domestic overnight visitor profile

The number of culture and heritage based Domestic overnight visitors to NSW in YE December 2018 was 5.4 million, up 11.1% when compared to YE December 2017. They stayed 19.6 million nights (up 14.3%) and spent \$5.3 billion (up 16.5%).

- They accounted for 16% of all Domestic overnight visitors to NSW, 18% of nights and 25% of expenditure.
- Culture and heritage Domestic overnight visitors to NSW travelled mainly for the purpose of Holiday (61%), Visit friends and relatives (26%) and Business (10%).
- Fifty-nine per cent of visitors came from intrastate. Of those, 35% came from Regional NSW; the largest proportion came from the coastal regions such as the South Coast and the North Coast, followed by the Hunter region. Sydneyiders accounted for 24% of the culture and heritage based visitors to the State. As for the Domestic interstate cultural and heritage visitors to NSW, most visitors came from Queensland and Victoria (15% and 14%, respectively), followed by the ACT (6%).
- Over a quarter of culture and heritage Domestic overnight visitors to NSW were aged 60 years+ (29%). Around 23% were between 15 and 29 years, and 17% were aged 50–59 years.
- Almost a third of culture and heritage Domestic overnight visitors to NSW (30%) travelled as part of an adult couple (the largest age group was 60 years and over). The second most common travel party was group of friends or relatives travelling together (27%, the largest proportion was youth), followed by solo travellers (20%, the largest chunk was aged 60+) and family group (19%, the most of them in their 40s).
- Staying in the homes of friends/relatives was the most popular type of accommodation utilised by culture and heritage Domestic overnight visitors to NSW (30%), followed by standard hotel/motor inn (21%) and luxury hotel or luxury resort (16%).
- Seasonality for culture and heritage Domestic overnight visitors to NSW is very much aligned with seasonality for all Domestic overnight visitors to the State. School holidays and the seasons play key roles when deciding what time of year to travel. The most popular months for a culture and heritage visit to the State were January and April (11% each), followed by October (10%). December and February was the least popular month for a culture and heritage visitor to NSW (6% each). January mostly attracted the youth market (26%), as majority of youth would be on school/ university break or most likely on holiday leave if employed. On the other hand, April and October attracted those aged 60 and over (29% and 32%, respectively). *(Results based on average of 4 years data)*.

Domestic daytrip visitor profile

The number of culture and heritage based Domestic daytrip visitors to NSW in YE December 2018 was 5.5 million, up 7.0% when compared to YE December 2017. They spent \$765 million (up 14.4%).

- They accounted for 9% of all Domestic day trip visitors to NSW and 11% of expenditure.
- They travelled mainly for the purpose of Holiday (77%), while 13% came to Visit friends and relatives.
- Culture and heritage Domestic day trip visitors to NSW were mainly from intrastate (90%). Around half came from Regional NSW; the largest numbers came from the Hunter (10%), South Coast NSW and Central Coast (9% each) while forty percent were visitors from Sydney.
- Over a third of culture and heritage Domestic daytrip visitors to NSW were aged 60 years+ (35%). Around 18% were aged 30–39 years and 16% were 40 and 49 years.
- As for the seasonality, April and June were the top months for culture and heritage Domestic daytrip visitors to NSW (10% each) while February was the least popular month for the travel (6%). Cultural and heritage day trippers were more likely to travel in December, whereas their overnight equivalents were more likely to travel in January. *(Results based on average of 4 years data)*



Visitation trends

The volume of culture and heritage based visitors, nights and expenditure in NSW have increased since YE December 2010 and were the highest on record for all three metrics for the International, Domestic overnight and the Domestic day trip markets. The growth in visitors and expenditure in YE December 2018 vs YE December 2017 (up 7.5% and up 8.7%, respectively) were higher than the average annual growth since YE December 2010 (up 5.7% and up 8.3%, respectively).

The share of International visitors to all culture and heritage visitors to NSW has been almost steady in the last 9 years at around 19%. Domestic overnight and daytrip visitors showed some oscillations over the years but equalled their shares in the latest year. Domestic overnight visitors increased their share (from 38% in YE December 2010 to 40% in YE December 2018) at the expense of Domestic day trippers (2 percentage points down to 40% in YE December 2018).

Table 3. Culture and Heritage visitation to NSW snapshot

International and Domestic Cultural and Heritage visitors to NSW											
YE December 2018											
OVERVIEW											
GRAND TOTAL to NSW - overnight & daytrip	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors ('000)	8,735	8,578	9,495	9,762	10,601	11,624	12,277	12,619	13,569	7.5%	55.3%
Nights ('000)	55,074	55,004	56,536	59,508	65,458	73,267	77,596	83,162	87,035	4.7%	58.0%
Expenditure (\$ billion)	\$7.4	\$7.4	\$7.8	\$8.4	\$9.2	\$10.7	\$11.7	\$12.9	\$14.0	8.7%	89.4%
OVERNIGHT - International & Domestic											
Visitors ('000)	5,057	4,950	5,274	5,628	6,085	6,813	7,048	7,526	8,117	7.9%	60.5%
Nights ('000)	55,074	55,004	56,536	59,508	65,458	73,267	77,596	83,162	87,035	4.7%	58.0%
Expenditure (\$ billion)	\$6.9	\$6.9	\$7.2	\$7.8	\$8.6	\$10.1	\$11.0	\$12.2	\$13.2	8.4%	91.3%
DOMESTIC - overnight & daytrip											
Visitors ('000)	7,036	6,956	7,817	8,003	8,683	9,456	9,737	9,928	10,823	9.0%	53.8%
Nights ('000)	12,419	12,003	13,687	13,807	14,356	16,082	15,346	17,144	19,595	14.3%	57.8%
Expenditure (\$ billion)	\$3.3	\$3.4	\$3.6	\$4.0	\$4.3	\$4.7	\$4.5	\$5.2	\$6.1	16.2%	82.6%
INTERNATIONAL OVERNIGHT TRAVEL											
Visitors, Nights and Expenditure											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	1,699	1,622	1,678	1,759	1,918	2,168	2,541	2,691	2,746	2.1%	61.7%
Nights (000)	42,655	43,001	42,849	45,701	51,102	57,185	62,250	66,018	67,440	2.2%	58.1%
Average Length of Stay	25.1	26.5	25.5	26.0	26.6	26.4	24.5	24.6	24.6	0.1%	-2.2%
Expenditure (\$ billion)	\$4.1	\$4.0	\$4.2	\$4.4	\$4.9	\$6.0	\$7.2	\$7.7	\$7.9	3.5%	94.9%
Spend per visitor per night (\$)	\$95	\$93	\$97	\$96	\$96	\$105	\$115	\$116	\$117	1.3%	23.3%
DOMESTIC OVERNIGHT TRAVEL											
Visitors, Nights and Expenditure											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	3,358	3,328	3,595	3,869	4,168	4,645	4,507	4,835	5,371	11.1%	59.9%
Nights (000)	12,419	12,003	13,687	13,807	14,356	16,082	15,346	17,144	19,595	14.3%	57.8%
Average Length of Stay	3.7	3.6	3.8	3.6	3.4	3.5	3.4	3.5	3.6	2.9%	-1.4%
Expenditure (\$ billion)	\$2.9	\$2.9	\$3.1	\$3.4	\$3.7	\$4.1	\$3.9	\$4.6	\$5.3	16.5%	86.2%
Spend per visitor per night (\$)	\$230	\$243	\$224	\$249	\$259	\$255	\$253	\$266	\$271	1.9%	18.0%
DOMESTIC DAYTRIP TRAVEL											
Visitors, Nights and Expenditure											
	2010	2011	2012	2013	2014	2015	2016	2017	2018	% change 2018 vs. 2017	% change 2018 vs. 2010
Visitors (000)	3,679	3,628	4,221	4,134	4,515	4,811	5,230	5,093	5,452	7.0%	48.2%
Expenditure (\$ million)	\$475.8	\$450.2	\$554.5	\$567.1	\$565.9	\$583.0	\$621.7	\$669.2	\$765.4	14.4%	60.9%
Spend per visitor (\$)	\$129	\$124	\$131	\$137	\$125	\$121	\$119	\$131	\$140	6.8%	8.5%