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Australia
Council
for the Arts



WOODFORDIA INC PRESENTS

*Festival of
All Halls*

Domestic Arts Tourism

Connecting the country

The Australia Council for the Arts respects Aboriginal and Torres Strait Islander communities and cultures. Readers should be aware that this report may contain references to and images of members of the Aboriginal and Torres Strait Islander community who have passed away.

The words 'Aboriginal and Torres Strait Islander', 'First Nations' and 'Indigenous' are used interchangeably in this report to refer to the Aboriginal and Torres Strait Islander peoples of Australia, and their arts and cultures.

ISBN

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Cover:

Liam Gerner and Fru Skagerrak take a bow at the Rowella Hall on the Festival of Small Halls Summer Tour 2019. Credit: Damaris Rey Photography.

Foreword

The relationship between art and travel is long-standing, deep and complex. We travel to see art, and even when art isn't our primary destination, we naturally gravitate to the art of a place in order to understand the meaning of that place.

Domestic tourism provides an opportunity for Australians to immerse themselves in exceptional cultural experiences, and many Australians are travelling to experience the arts: at concerts, in galleries, on stages, or through more niche opportunities across the country.

Arts experiences have a growing role as a driver for tourism in Australia and are increasingly part of visitors' itineraries. This report presents trends and insights on how Australians connect with the arts as they travel around the country, whether on short daytrips or longer overnight stays. It helps build the picture of Australians' willingness to travel for the arts, of the value of the arts in helping us understand the place we are in, and the great capacity of the arts to support local economies and build stronger regional communities.

From large scale festivals and events, to visits to artist workshops and studios, the arts draw domestic tourists to both metropolitan and regional locations, providing opportunities to share local creativity and culture with visitors.

There is a willingness to travel to destinations beyond capital cities to seek new and authentic experiences, including growing engagement with First Nations arts and craft – diverse expressions of the world's oldest continuing living culture.

Australians are connected through these experiences by building our community wellbeing, cultural identity and social cohesion, while supporting local and regional economies.

As a priority under our five-year strategy *Creativity Connects Us*, the Australia Council is committed to enabling more opportunities for Australians to be captivated by arts experiences in everyday life. We want inspiring arts experiences to be welcoming and easily accessible, and reflective of our unique culture that is simultaneously ancient and contemporary.

This report is a companion piece to our previous research publication *International Arts Tourism: Connecting cultures*. Together these reports highlight the value of arts and culture to Australia's tourism strategies and the importance of a vibrant, creative landscape for tourism, the broader visitor economy and society as a whole. They also equip artists and arts organisations with valuable intelligence about the behaviours and interests of tourists in Australia and strengthen the evidence base for Australian arts and creativity.

Elevating the value and broader relevance of arts and creativity in Australian public life and policy making is critical to a creatively connected nation where creative enterprise is entrenched across society, industry and government as the fuel that ignites our social, cultural and economic success.

Dr Wendy Were,
Executive Director Strategic Development
and Advocacy



Payphone



Contents

| | |
|-------------------------------------|-----------|
| Introduction | 4 |
| Key insights | 6 |
| Domestic arts tourism | 8 |
| Daytrips | 20 |
| Overnight trips | 46 |
| State and territory analysis | 71 |
| NSW | 71 |
| Victoria | 72 |
| Queensland | 73 |
| South Australia | 74 |
| Western Australia | 75 |
| Tasmania | 76 |
| Northern Territory | 77 |
| ACT | 78 |
| Additional resources | 79 |
| Explanatory notes | 80 |
| Variable definitions | 84 |

Bobbi Henry performing *Cracked* -
Yirra Yaakin Theatre Company Production.
Credit: Dana Weeks.

Introduction

Domestic arts tourism supports local jobs and economies while enriching and connecting Australians through creative experiences.

Arts experiences play a vital role in the daily lives of Australians and a growing number of Australians are engaging with the arts on both daytrips and overnight trips.

This research brings together data from Tourism Research Australia's (TRA) National Visitor Survey with additional resources to provide insights into domestic arts tourism in Australia.

A companion piece to the Australia Council's *International Arts Tourism: Connecting cultures* (2018), this research highlights the potential for the arts to support and drive domestic tourism in Australia and for Australian artists and arts organisations to build their audience reach. It contributes to the evidence about the critical role of arts and creativity to the wellbeing and success of our nation.

Homage to the Castlemaine Woollen Mill workers - Libre Hem, 2017. Credit: Denise Button, The Mill Castlemaine.



Domestic arts tourist definition

In this research, a **domestic arts tourist** is defined as a resident of Australia who did at least one of the following while on a daytrip or overnight trip within Australia:

- attended theatre, concerts or other performing arts
- visited museums or art galleries
- visited art or craft workshops or studios
- attended festivals, fairs or cultural events
- experienced First Nations art, craft and cultural displays

Australians travel in different ways, depending on their destination, time available and preferences. This report includes analysis of daytrips and overnight trips as defined below.

Daytrip definition

Tourism Research Australia defines daytrip visitors as Australian residents who travelled at least 50 kilometres away from home (round trip) and were away from home for at least four hours but do not spend a night away from home as part of their travel.¹

Australians travelling on daytrips are likely to go to destinations closer to their home, given the limited time daytrips afford.

Overnight trip definition

Overnight trips are taken by Australians wanting to stay longer at their destination, or who may be visiting a destination that is further away from their home.

Tourism Research Australia defines an overnight trip as a trip where Australian residents stayed one or more nights at least 40km from home while travelling within Australia.²

Tourism Research Australia's tourism regions

Tourism Research Australia divides Australia into 77 tourism regions based on the Australian Bureau of Statistics (ABS) geography standard. Throughout this report selected tourism regions are highlighted by data and case studies. Please see explanatory notes for more information.

Time periods for analysis

To ensure sufficient sample sizes for analysis, this report looks at two time periods.

At the overall, state and territory, capital city tourism regions and metropolitan and regional levels, analysis is based on data for the 2018 calendar year. All other tourism region data is reported as four-year average data from 2015–2018 unless specified.

Please see explanatory notes for more information.

¹ Tourism Research Australia 2019. <https://www.tra.gov.au>

² Ibid.

Key insights

Domestic arts tourism is growing

Greater numbers of Australians are travelling than ever before. **Along with population growth and overall growth in domestic tourism, the numbers of Australians engaging with the arts while exploring their own country are growing.**

In 2018, Australians took 12.3 million daytrips and 13.4 million overnight trips within Australia that included arts activities. Since 2014, there have been increases in the total numbers of tourists engaging with arts activities on both daytrips (+14%) and overnight trips (+20%).

There have been increases across all arts activities: visiting museums and art galleries; attending performing arts; visiting art or craft workshops or studios; attending festivals; and experiencing First Nations arts and craft.³ More domestic tourists attend the arts than organised sport, amusement parks or wineries.

While more Australians overall are connecting with the arts on their travels around Australia, there are differences in trends across certain activities in certain locations.

There are unique offerings in different parts of Australia

There is no one-size-fits all for arts engagement on a domestic trip – Australians connect with the arts in a broad range of ways. The most popular and fastest-growing arts tourism activities vary across the country. Each state, territory and region offers unique arts and creative experiences, and this is reflected in the data.

Major cities account for the largest volume of arts tourism – in part driven by performing arts, with access to many large venues in cities.

At the same time, the destinations where tourists are especially likely to engage with the arts are in regional Australia, including many arts tourism ‘hot spots’: areas with both a high volume and a high likelihood of tourists engaging with the arts while there. Art or craft workshops or studios are particularly popular in regional areas.

This research highlights the value of the arts in both helping Australians understand the place they are visiting, and in supporting local economies and communities.

³ 'First Nations art/craft and cultural displays'. TRA's National Visitor Survey does not collect data on First Nations performances.



First Nations arts and craft are a strong and growing area of domestic arts tourism

First Nations arts tourism is increasing, reflecting Australians' strong and growing interest in engaging with First Nations arts for their beauty, strength and power, and to understand who we are as a nation.

The regions where tourists are most likely to engage with First Nations arts and craft are in regional Australia, and particularly regional areas of the Northern Territory where First Nations arts and craft are driving arts engagement by tourists.

This research contributes to a growing body of evidence about the opportunity that First Nations arts provide to support First Nations peoples' economic development and Australia's national culture and identity, based on the strength of the world's oldest continuing living culture and storytelling stretching back for millennia.

It reinforces the particular strength and value of First Nations arts to regional and remote communities and economies and to tourism in Australia.

Arts tourism tends to align with travelling further, staying longer and spending more

Arts tourists are high value tourists – they are more likely to stay longer and spend more when travelling than domestic tourists overall.

Australians are more likely to engage with the arts when they travel further afield – those who take overnight trips rather than daytrips, and those who travel outside their home state. The areas where tourists are most likely to engage with the arts are often outside the large east coast capital cities.

These results suggest that Australians are turning to the arts when they are exploring new places and seeking out authentic experiences of the many and varied parts of the country. The stories and perspectives brought to life through the arts provide unique conduits for visitors to understand the place they are visiting, its people, landscape and history.

Big Red Bash, Birdsville QLD. Credit: Matt Williams.



Domestic arts tourism

Australians are taking an increasing number of arts daytrips and overnight trips each year

Domestic arts tourism has increased more than overall domestic tourism since 2009.

Although the likelihood of tourists engaging with the arts has remained stable in recent years, there are variations in this trend for specific arts activities and locations. Trips to certain locations have increased significantly while others have decreased; examples are discussed throughout this report.

Daytrips

In 2018, Australians took 12.3 million daytrips within Australia that included an arts activity ('arts daytrips'), 6% of all daytrips taken.

In total, Australians took 205.3 million domestic daytrips in 2018, an increase of 39% since 2009. In comparison, arts daytrips have increased 60% over the same time period (figure 1).

Since 2014, the trend has become more stable, with total daytrips and arts daytrips increasing 17% and 14% respectively.

Overnight trips

In 2018, Australians took 13.4 million overnight trips within Australia that included an arts activity ('overnight arts trips'), 13% of all overnight trips taken.

A higher proportion of tourists are engaging with the arts on overnight trips (13%) compared to daytrips (6%).

Australians took 104.8 million overnight trips in total, an increase of 55% since 2009. Overnight arts trips grew by 71% over the same time period (figure 2).

As with daytrips, the trend in overnight trips has become more stable in recent years. Total overnight trips increased 24% and overnight arts trips increased 20% since 2014.

Figure 1: Arts daytrip trends 2009–2018

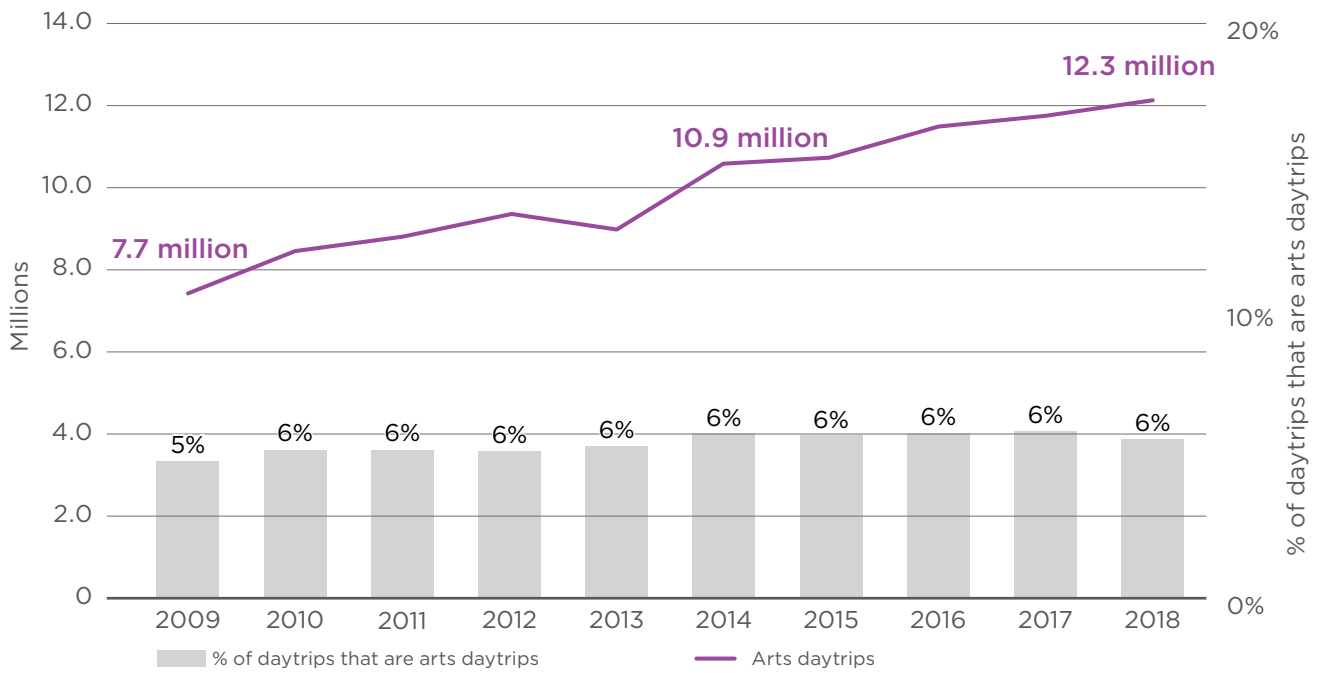
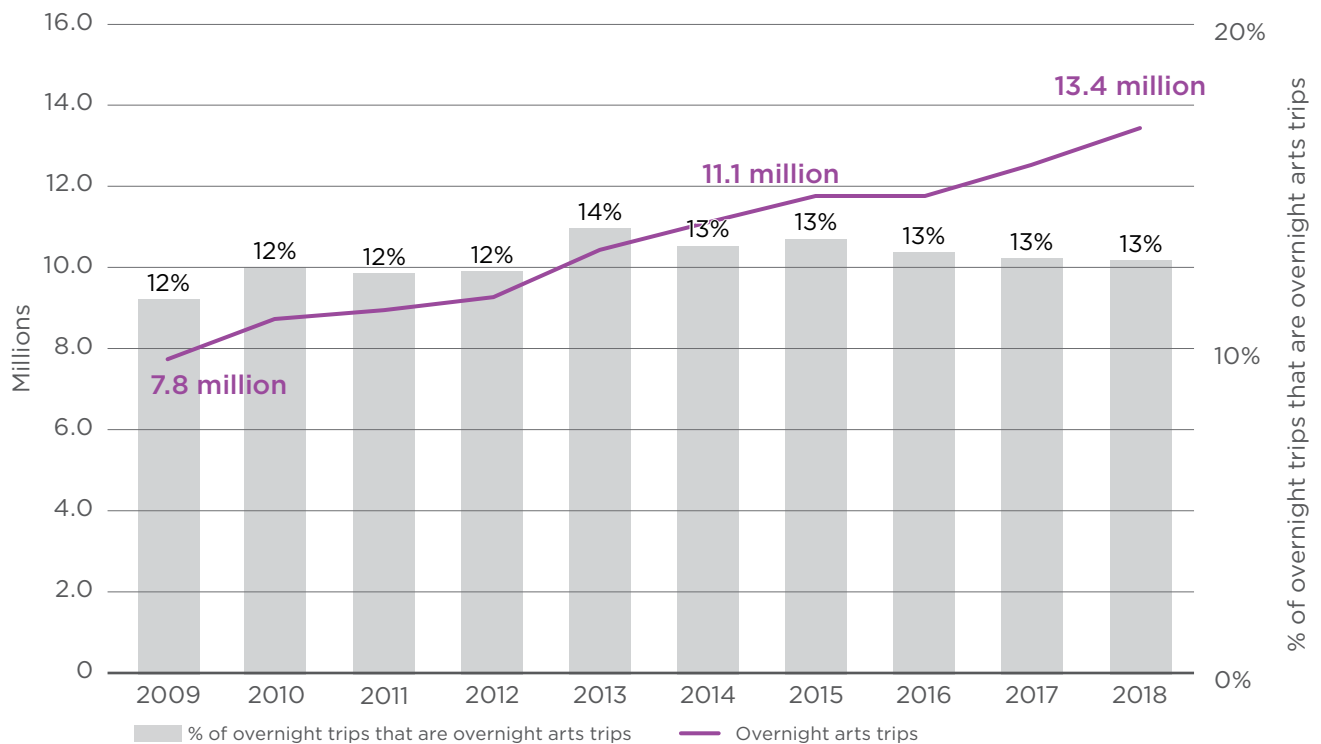


Figure 2: Overnight arts trip trends 2009–2018



Counting and Cracking
Belvoir St Theatre and
Co-Curious co-production 2019.
Credit: Brett Boardman.

Australia Council research shows increased attendances arts activities

The Australia Council's National Arts Participation Survey found that more than 14 million Australians attended an arts event in 2016 (72%). The overall trend was stable but within selected art forms there was increased attendance, including at theatre and dance (53%, up from 42% in 2013), visual arts and craft (46%, up from 43% in 2013) and First Nations arts (35%, up from 24% in 2013). Almost half of the population attended an arts festival in 2016 (45%).⁴

Attendances at Australia Council supported arts activities have also been growing. In 2018-19, there were 19.1 million attendances at Australia Council supported activities within Australia, an increase of 44% over the past five years.⁵



4 Australia Council 2017, *Connecting Australians: Results of the National Arts Participation Survey*. June 2017, Sydney. <https://www.australiacouncil.gov.au/research/connecting-australians>

5 The support comprises all programs delivered and administered by the Australia Council acquitted in 2018-19. This can include activity that was funded in previous years. The data was correct at 30 July 2019.



Domestic arts tourists are prepared to travel and spend for the arts

Domestic arts tourists are high value tourists. They are likely to stay longer on overnight trips and spend more per trip than domestic tourists overall, indicating the potential of arts and creative activities to support local economies.

Daytrips

The average amount spent per trip on an arts daytrip in 2018 was \$138, almost \$30 more than the average daytrip.

Australians on arts daytrips contributed \$1.7 billion, or 8%, of the total daytrip expenditure in 2018.⁶

Overnight trips

Overnight arts tourists are staying longer and spending more than overnight domestic tourists overall. **For tourists travelling further from home, engaging with the arts can provide an opportunity to learn about and appreciate a place that is different to their home.**

In 2018, overnight arts tourists contributed \$14.3 billion, or 20% of the total overnight domestic tourist spend, higher than the contribution of those on arts daytrips to the total daytrip spend (8%).⁷

Tarnanthy 2019 launch, Art Gallery of South Australia, Adelaide.
Credit: John Montesi.



In 2018, the average length of stay for an arts overnight trip was five nights. In comparison, the average number of nights spent away from home on any overnight trip was three and a half nights.

The average amount spent on an overnight arts trip was \$1,068, nearly \$400 more than the overall average overnight spend (\$685).

Tourists who went on overnight trips including First Nations arts, craft and cultural displays ('First Nations arts and craft')⁸ spent an average of \$1,558 per trip, the highest spend of all arts activities. The average nights per trip including First Nations arts and craft was seven and a half nights, which was the longest average trip length of all arts activities.

This could be in part due to tourists travelling further and into more remote regions to experience First Nations arts and culture.



Arts daytrips that included performing arts had the highest spend of all arts activities

Daytrips that included attending theatre, concerts or other performing arts ('performing arts') had the highest average spend of all arts daytrips at \$159. There may be several factors contributing to this, such as ticket price and the relative prices of other arts activities in comparison. Many museums, galleries and festivals offer free entry.

In 2018, Live Performance Australia's *Ticket Attendance and Revenue Report* found the average ticket price to a live performance event was \$99.03. This includes all categories of performing arts such as theatre, musical theatre, contemporary music, classical music, ballet and dance, and festivals. Excluding the special events category, contemporary music festivals had the most expensive average ticket price in 2018 at \$131.58.

Average ticket prices in 2018 for all live performance categories⁹

| | |
|--------------------------------|----------|
| Special events | \$152.70 |
| Festivals (contemporary music) | \$131.58 |
| Opera | \$124.11 |
| Contemporary music | \$117.77 |
| Comedy | \$114.20 |
| Musical theatre | \$108.85 |
| Ballet and dance | \$90.81 |
| Classical music | \$79.13 |
| Theatre | \$63.91 |
| Circus and physical theatre | \$60.96 |
| Children's/family | \$40.63 |
| Festivals (multi category) | \$40.52 |

6 The total spend on daytrips in 2018 was \$22.4 billion. The total spend on *arts* daytrips in 2018 was \$1.7 billion.

7 The total spend on overnight trips in 2018 was \$71.8 billion. The total spend on overnight *arts* trips in 2018 was \$14.3 billion.

8 TRA's National Visitor Survey does not collect data on First Nations performances.

9 Live Performance Australia 2018, *LPA Ticket Attendance and Revenue Report 2018*. <https://reports.liveperformance.com.au/ticket-survey-2018>

Domestic tourists are more likely to attend the arts than sports events, amusement parks or wineries

The arts feature prominently in activities undertaken by domestic tourists, whether taking daytrips or longer overnight trips.

Daytrips

In 2018, arts activities attracted more than double the number of daytrips compared to organised sport events, and were more popular than markets, heritage sites, wineries, wildlife parks, zoos and aquariums, amusement parks and casinos (figure 3).

Overnight trips

As well as the activities listed for daytrips, overnight tourists are also more likely to engage with the arts than visit national or state parks (figure 4).¹⁰

¹⁰ Activities are based on a list of 52 predetermined activity categories in Tourism Research Australia's National Visitor Survey (NVS).

AWESOME Festival 2019. *Peter and the Wolf* - WA Ballet.



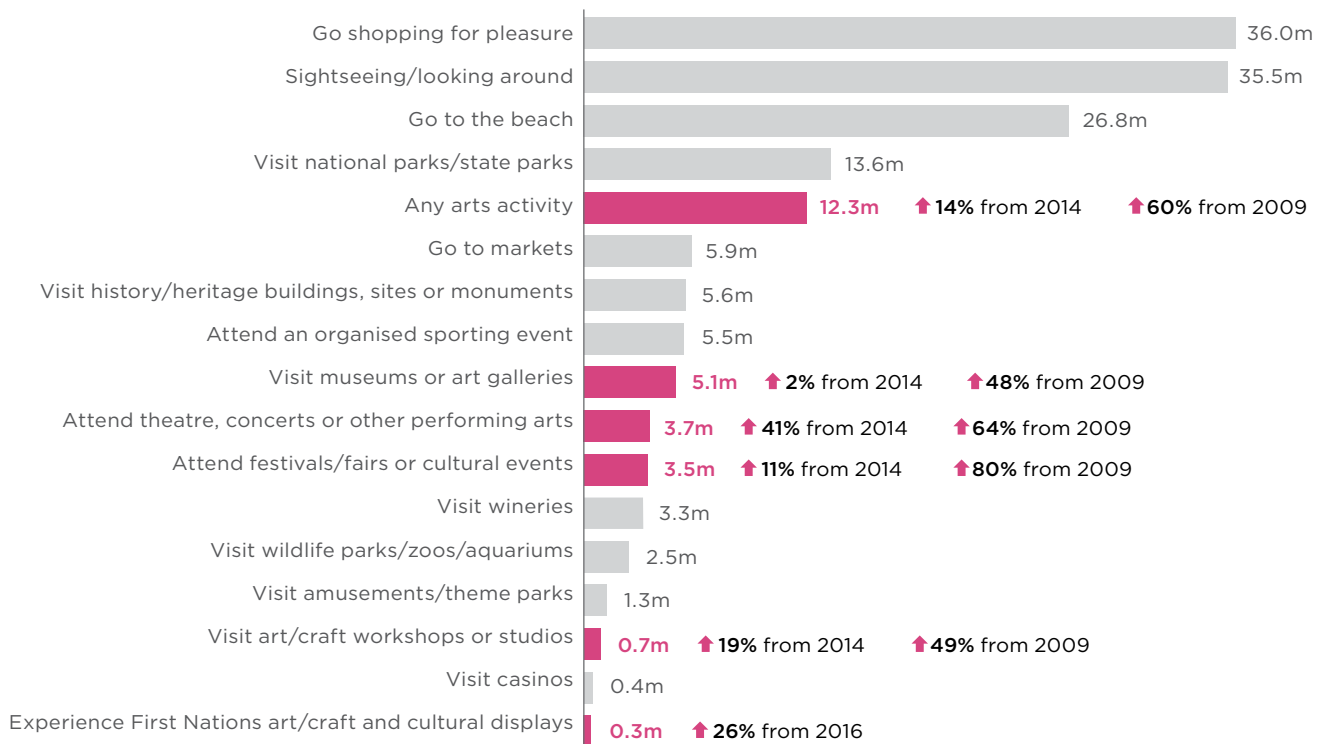
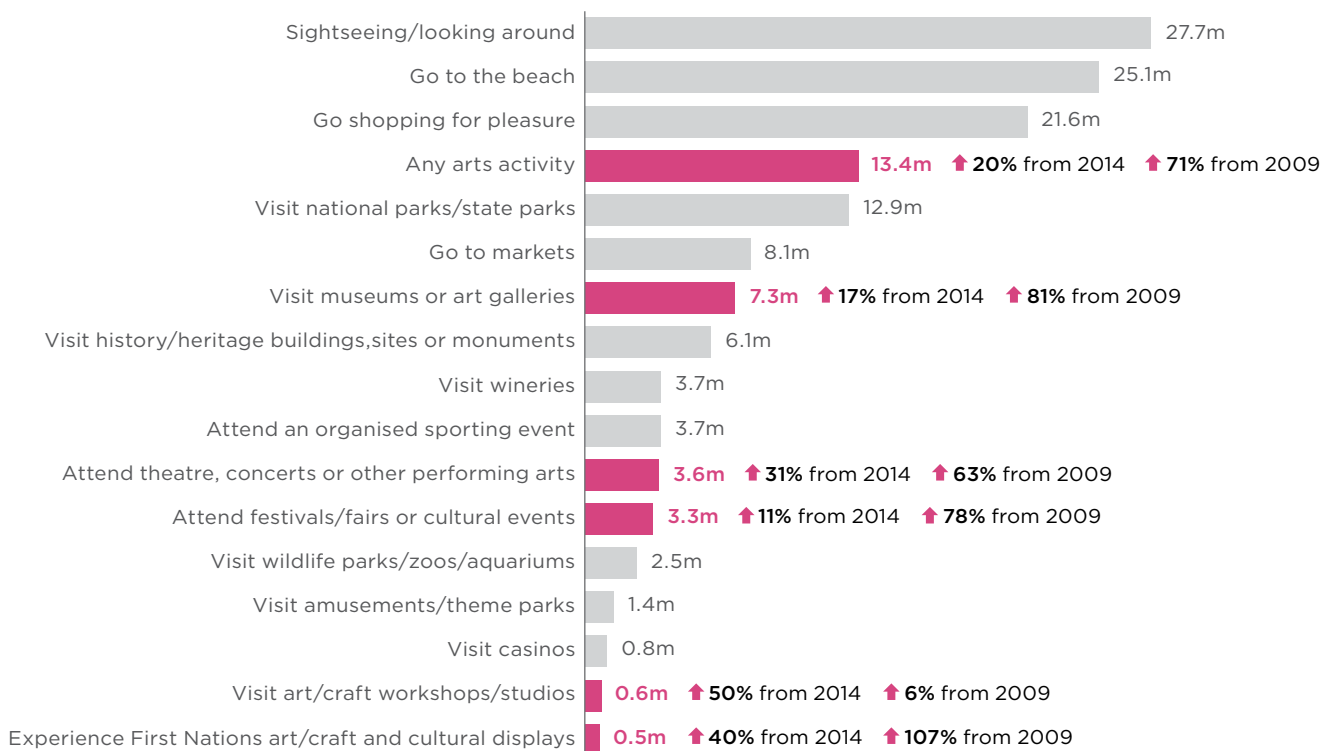
Figure 3: Selected activities undertaken on a daytrip in 2018¹¹

Figure 4: Selected activities undertaken on an overnight trip in 2018



¹¹ Activities are based on a list of 52 predetermined activity categories in Tourism Research Australia's National Visitor Survey (NVS). Percentage changes from 2009 and 2014 are not publishable for First Nations arts and craft due to small sample sizes.

Museums and art galleries are the most popular arts activities on domestic trips

On both daytrips and overnight trips in Australia, attending museums or art galleries is the most popular arts activity. Museums and art galleries are an accessible and affordable form of engagement with the arts, and often require less forward planning to attend than other arts activities.

Daytrips

In 2018, 5.1 million daytrips included visits to museums or art galleries, a relatively stable trend overall since 2014 (increasing 2%).

Overnight trips

In 2018, 7.3 million overnight trips included visits to museums or art galleries, an increase of 17% since 2014.

The average length of stay for overnight trips including museums or art galleries was nearly six nights with an average spend of \$1,271 per trip, compared to the average overnight arts trip of five nights and an average spend of \$1,068 per trip (page 13).



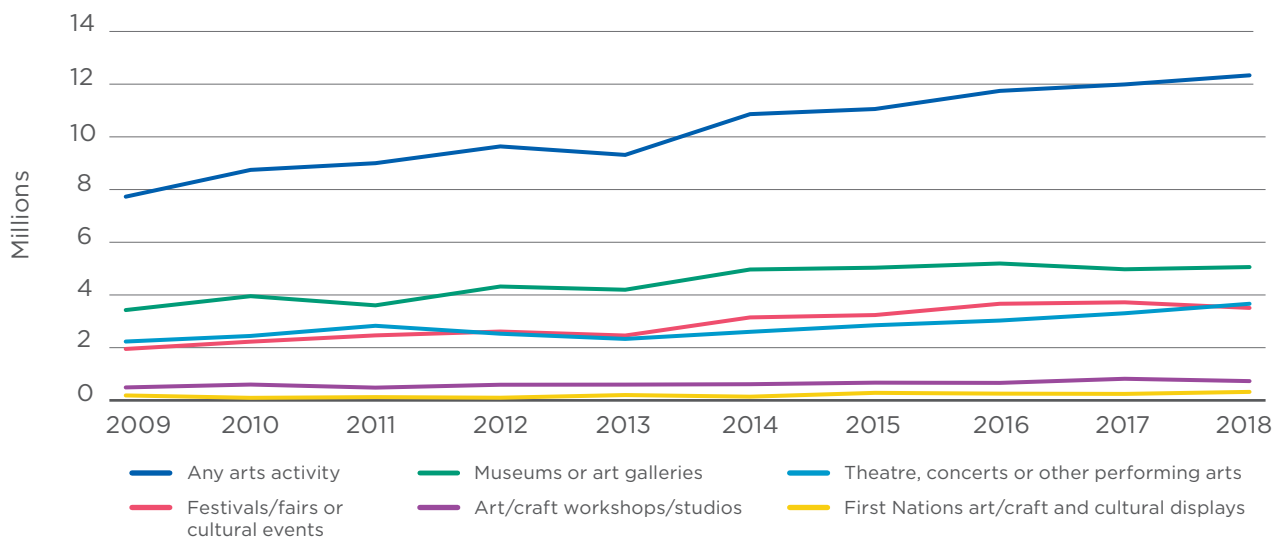
The numbers of tourists engaging with different arts activities on domestic trips are increasing

Since 2014 there have been increases in the total numbers of tourists engaging with arts activities on both daytrips (+14%) (figure 5) and overnight trips (+20%) (figure 6).

Total numbers of daytrips and overnight trips have also increased, so the likelihood of engaging with the arts has remained stable (figures 1 and 2).

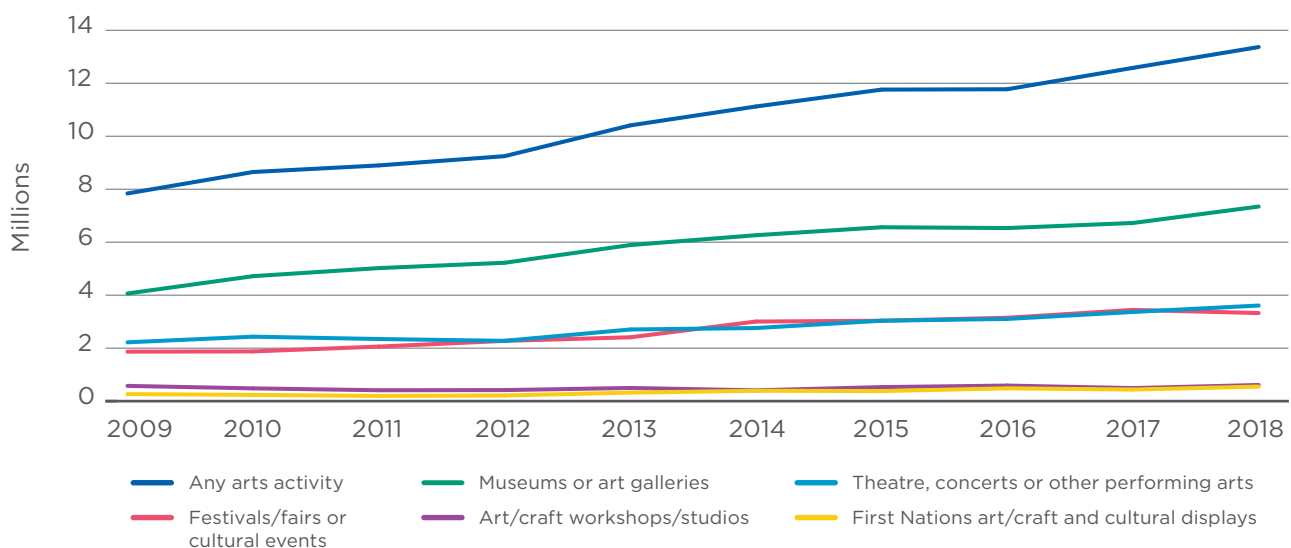
Daytrips

Figure 5: Growth trends in daytrip numbers by activity 2009–2018



Overnight trips

Figure 6: Growth trends in overnight trip numbers by activity 2009–2018



There is growth in domestic tourists' engagement with First Nations arts and craft

Australians' interest in, and attendance at, First Nations arts and craft activities has continued to increase in recent years. The Australia Council's National Arts Participation Survey found that nearly half of all Australians are actively interested in First Nations arts (47%) and seven million attended in 2016 – a record level of attendance and double that of 2009. Attendance has increased across art forms.¹²

Tourism Research Australia's domestic tourism data shows that many Australians want to experience First Nations culture while on holiday or are willing to travel to experience First Nations arts and craft. Supporting this finding, research from the Northern Territory found that nearly two thirds of Australians want to learn about First Nations beliefs and connection to the land while on holiday.¹³

Daytrips

In 2018, Australians went on over 320,000 daytrips that included First Nations arts and craft. Daytrips including First Nations arts and craft have grown 26% since 2016, the fastest growing arts activity over the last two years.¹⁴

Overnight trips

In 2018, over half a million overnight trips in Australia included First Nations arts and craft, an increase of 40% since 2014.

¹² Australia Council 2017, *Connecting Australians: Results of the National Arts Participation Survey*, June 2017, Sydney. <https://www.australiacouncil.gov.au/research/connecting-australians>

¹³ Northern Territory Government Department of Tourism and Culture 2017, *National demand for cultural tourism in Australia*, Northern Territory Government Department of Tourism and Culture. <http://tourismnt.com.au/en/research/topical-research>

¹⁴ Comparison to 2014 is not publishable due to small sample size.

Mitch Mahoney (Boonwurrung and Barkindji), *Lines on Country* (work in progress), 2019, sandcast and engraved glass, courtesy of the Artist and Vivien Anderson Gallery. Credit: Canberra Glassworks.



Domestic arts tourists are similar in profile to the average domestic tourist

Arts tourists, whether taking daytrips or longer overnight trips, include all genders and age groups.

Figure 7: Daytrip arts tourist profile 2018

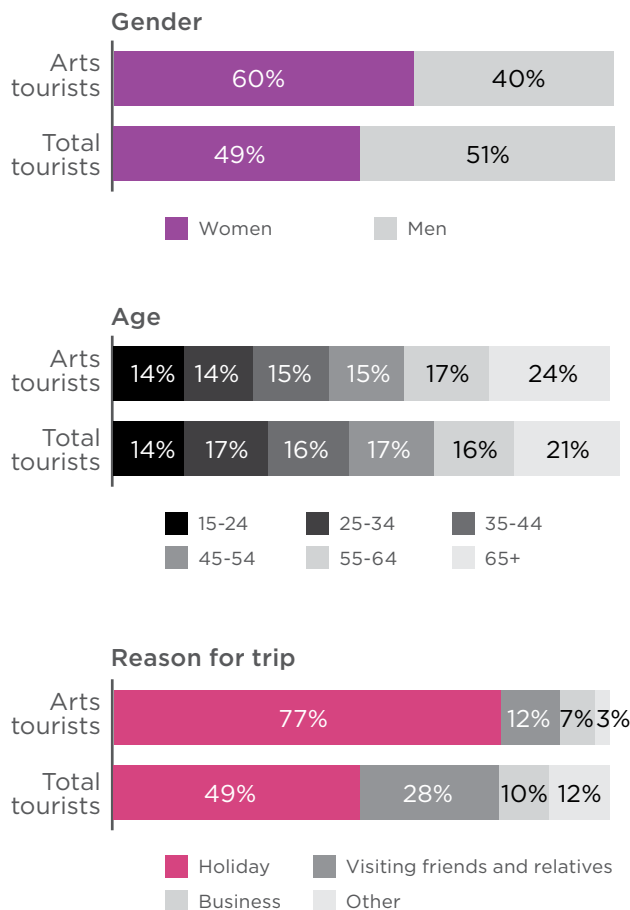
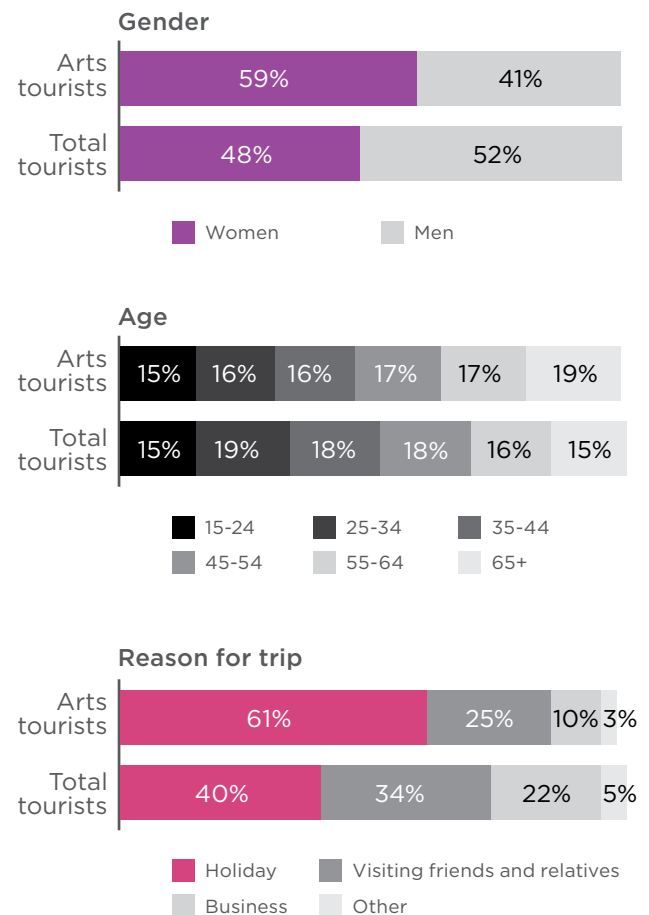


Figure 8: Overnight arts tourist profile 2018



While similar, there are some slight differences between arts tourists and tourists in general. For example:

- The average domestic arts tourist (both daytrip and overnight trip) is a woman, aged over 45 and on holiday.
- The average daytrip tourist overall is a man, aged over 45 and on holiday.
- The average overnight tourist overall is a man, aged under 45 and on holiday.

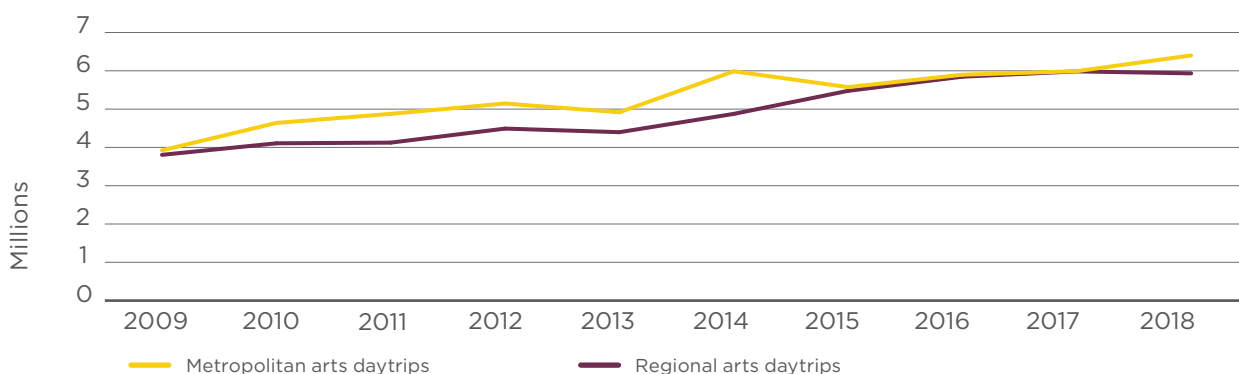
Daytrips

Arts daytrips to regional areas have increased at a higher rate than arts daytrips to metropolitan areas

Regional areas are drawing almost as many Australians on arts daytrips as metropolitan areas. Moreover, since 2014 regional arts daytrips have increased at a higher rate than both metropolitan arts daytrips and daytrips overall.

In 2018, there were 5.9 million arts daytrips taken to regional areas, an increase of 22% since 2014. In comparison, there were 6.4 million arts daytrips taken to metropolitan areas, an increase of 7% since 2014 (figure 9).

Figure 9: Growth trends in metropolitan and regional arts daytrips 2009–2018

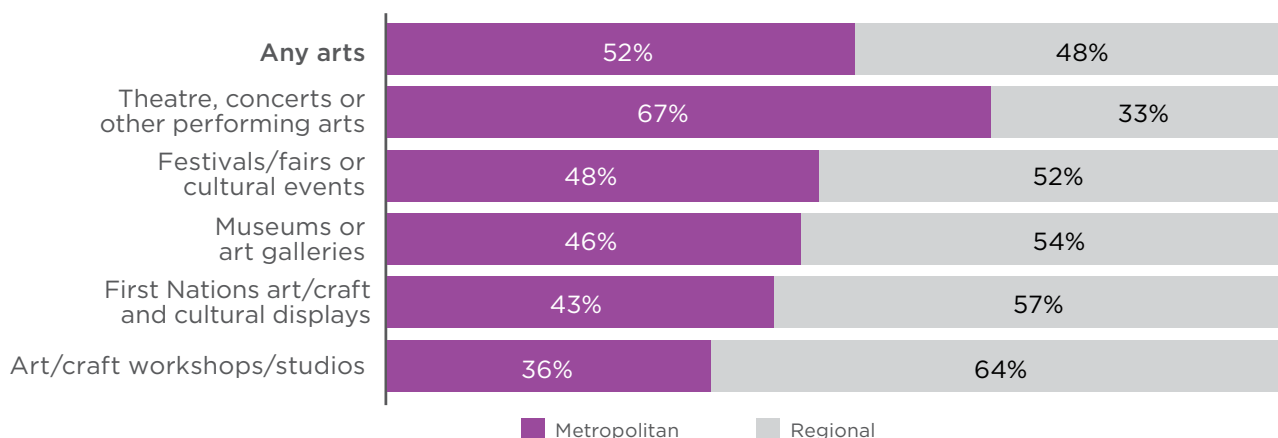


Most arts activities, especially visits to craft workshops and studios, are more likely to be undertaken on daytrips to regional areas

While capital cities account for slightly higher overall numbers of arts daytrips, this is in part driven by the higher popularity of performing arts in capital cities – 67% of performing arts daytrips occurred in metropolitan locations in 2018.

All other arts activities are more likely to be undertaken on regional daytrips (figure 10). This includes attending museums or art galleries, the most popular arts daytrip activity (see case study on page 39).

Figure 10: Percentage of daytrips undertaken in metropolitan or regional Australia in 2018





Artists in regional areas are opening their studios to visitors

Open artist studios offer a unique experience: a rare opportunity for visitors to meet artists, see their private studios and view works in progress. Visitors can engage with the depth of the artist's work, seeing it through a more personal lens than on a gallery visit.

Making Art Work, a 2017 study of professional artists working in Australia, found that one in six Australian artists live in regional cities or towns, and craft practitioners are some of the most likely to live outside capital cities.¹⁵

Margaret River Region Open Studios, a free and annual open art event celebrates the diverse and vibrant visual art in the Margaret River Region in Australia's South West. Over 100 artists in the Margaret River region open their studios to visitors, showcasing art forms from craft and visual art to printmaking and installation.¹⁶

15 Australia Council for the Arts 2017, *The Arts in Regional Australia: A Research Summary*, November 2017, Sydney. <http://www.australiacouncil.gov.au/research/regional-arts-summary>
Throsby, D & Petetskaya, K 2017 *Making Art Work: An Economic Study of Professional Artists in Australia*, available at <https://www.australiacouncil.gov.au/research/making-art-work>

16 Margaret River Region Open Studios 2019, viewed 5 November 2019. <https://www.mrropenstudios.com.au>
Australia's South West 2019, viewed 5 November 2019. <https://www.australiassouthwest.com/event/margaret-river-region-open-studios-0>

Makers' Space, Makers' Workshop - Exhibition: The Environment Potion by Con Rhee, curated by Joanna Gair, 2017. Photo by UTAS Media Dept, 2017.

Burnie's Makers' Workshop is a space for people to make and experience art

Makers' Workshop is a cultural hub in Tasmania's North West celebrating local makers, innovators and artists, operated by the University of Tasmania.

Opened in 2009, Makers' Workshop offers a range of visitor experiences including interactive paper-making tours, encounters with artists, historic displays and an exhibition space.

The Workshop is well-known for its vibrant Makers' Program, a consortium of over 30 local artisans specialising in a variety of craft and art forms. Makers' demonstrate their skills and techniques to visitors, showcasing and selling a broad range of quality handmade products and artworks at the on-site studios.

Makers' Workshop has become increasingly important for the local region as a cultural attractor for more than 135,000 visitors annually, but also as a learning space for people to make and experience art in a place-based setting.





Performing arts are a popular drawcard for daytrips to capital cities

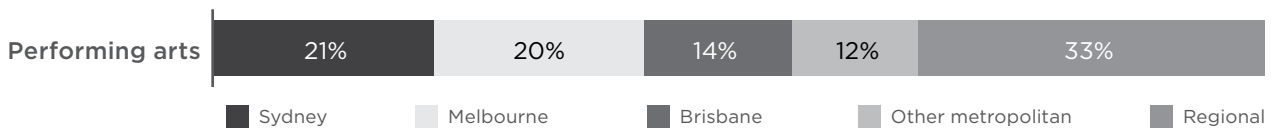
Capital cities are key tourism regions for performing arts – predominantly Sydney, Melbourne and Brisbane.

In 2018, more than half of all performing arts daytrips occurred in Sydney, Melbourne or Brisbane (55%).

Sydney was the most popular daytrip region for attending performing arts, accounting for 21% of all performing arts daytrips (figure 11). The trend is similar for attendances at performing arts on overnight trips – 23% of all performing arts overnight trips included an overnight stopover in Sydney.

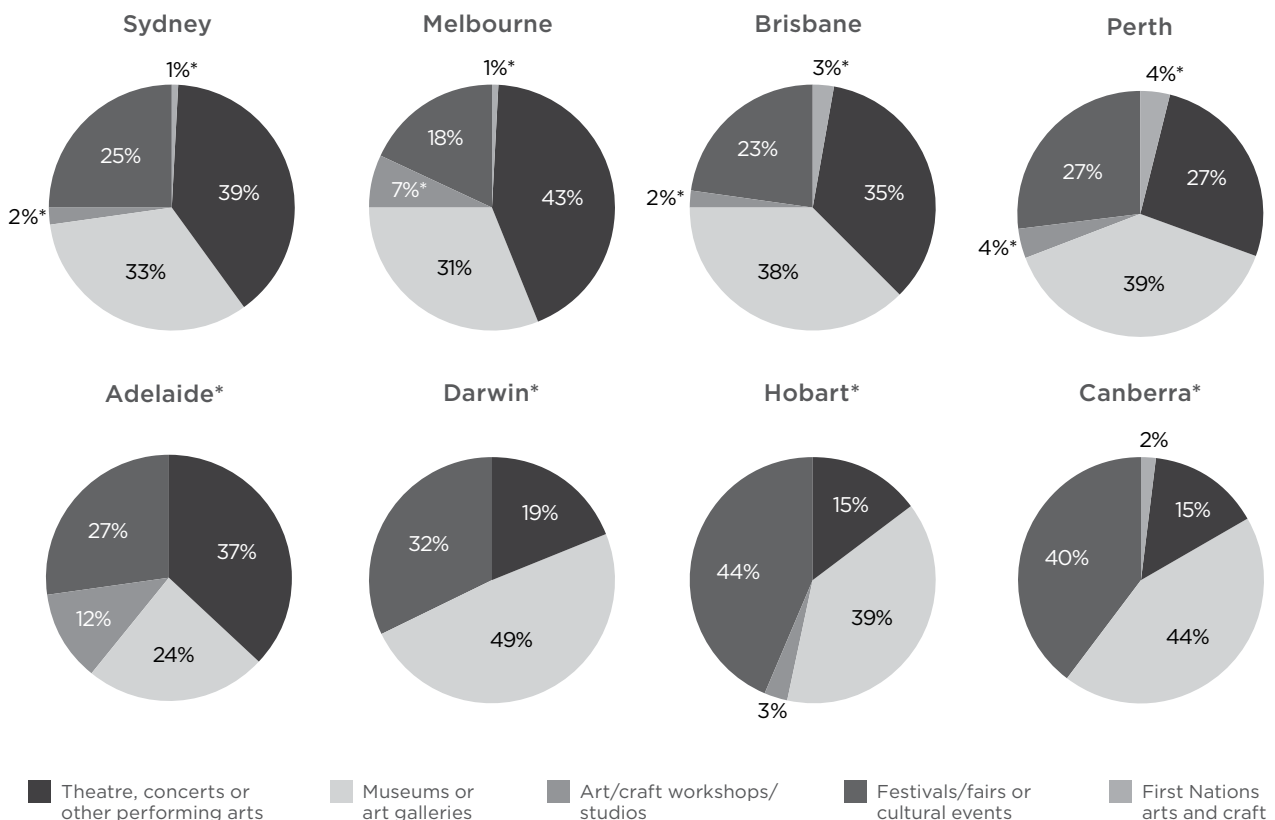
Sydney is also the most popular daytrip region overall (see page 28–29).

Figure 11: Proportion of performing arts daytrips by location in 2018



The most popular arts activities differ between capital cities. Performing arts is the most popular domestic arts tourism daytrip activity in Sydney, Melbourne and Adelaide, while visiting museums or galleries is the most popular domestic arts tourism daytrip activity in Brisbane and Perth (figure 12).

Figure 12: Visitors’ engagement with arts activities in capital cities on a daytrip in 2018



*This data should be used with caution due to low sample sizes.

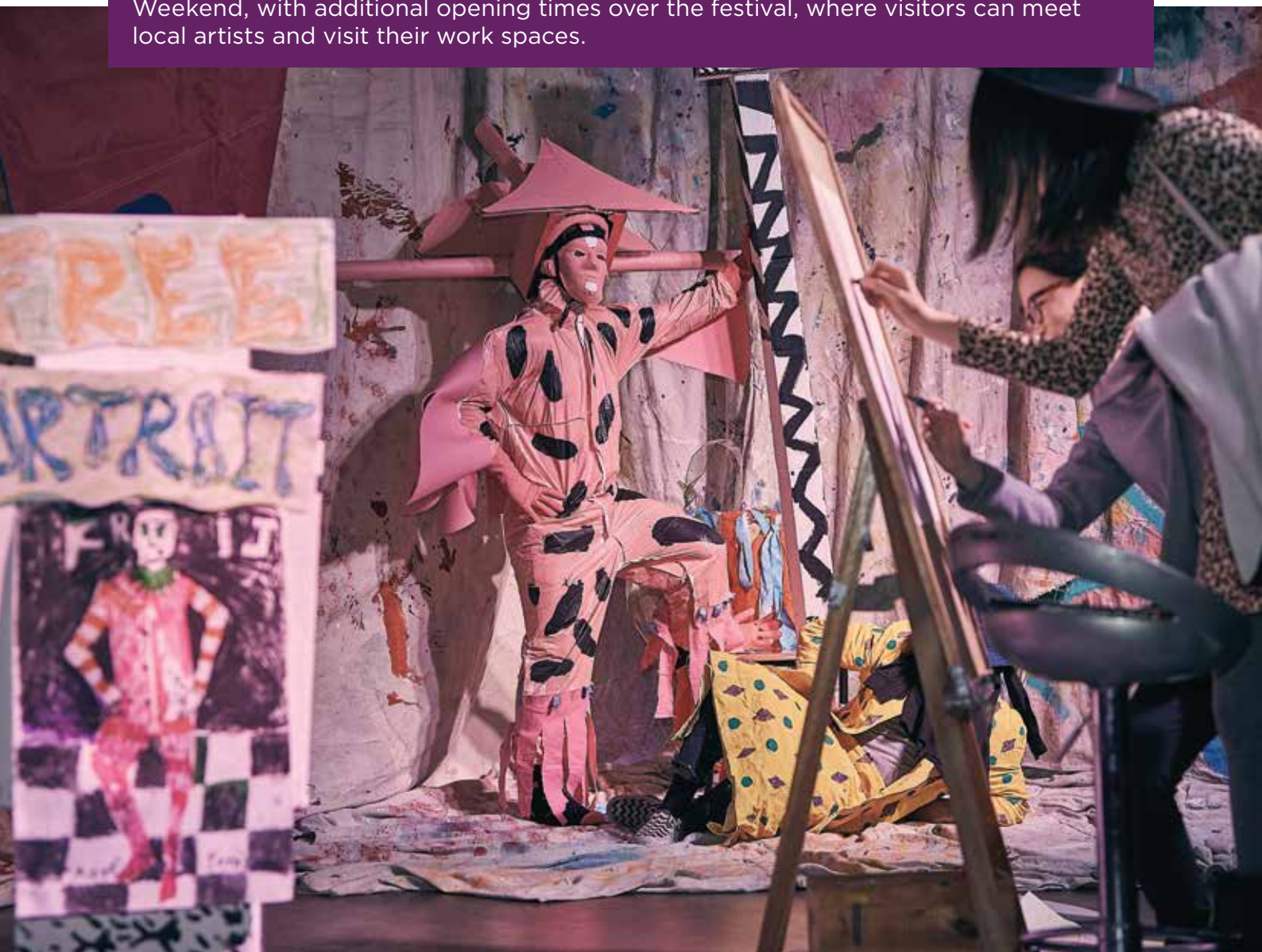
Adelaide has a high proportion of arts daytrips that include craft workshops

There can be blurred boundaries between the arts activities in the National Visitor Survey (NVS) and while respondents select the category that best fits the activity undertaken, they may choose more than one category for the same activity.

For example, a workshop that is part of a festival may be reported as festival attendance or workshop attendance or both.

Workshops are often a featured part of a festival's program. The South Australian Living Artists Festival (SALA) is a state-wide festival of visual art held yearly in locations across South Australia – not just Adelaide – to promote and celebrate South Australian visual artists.¹⁷

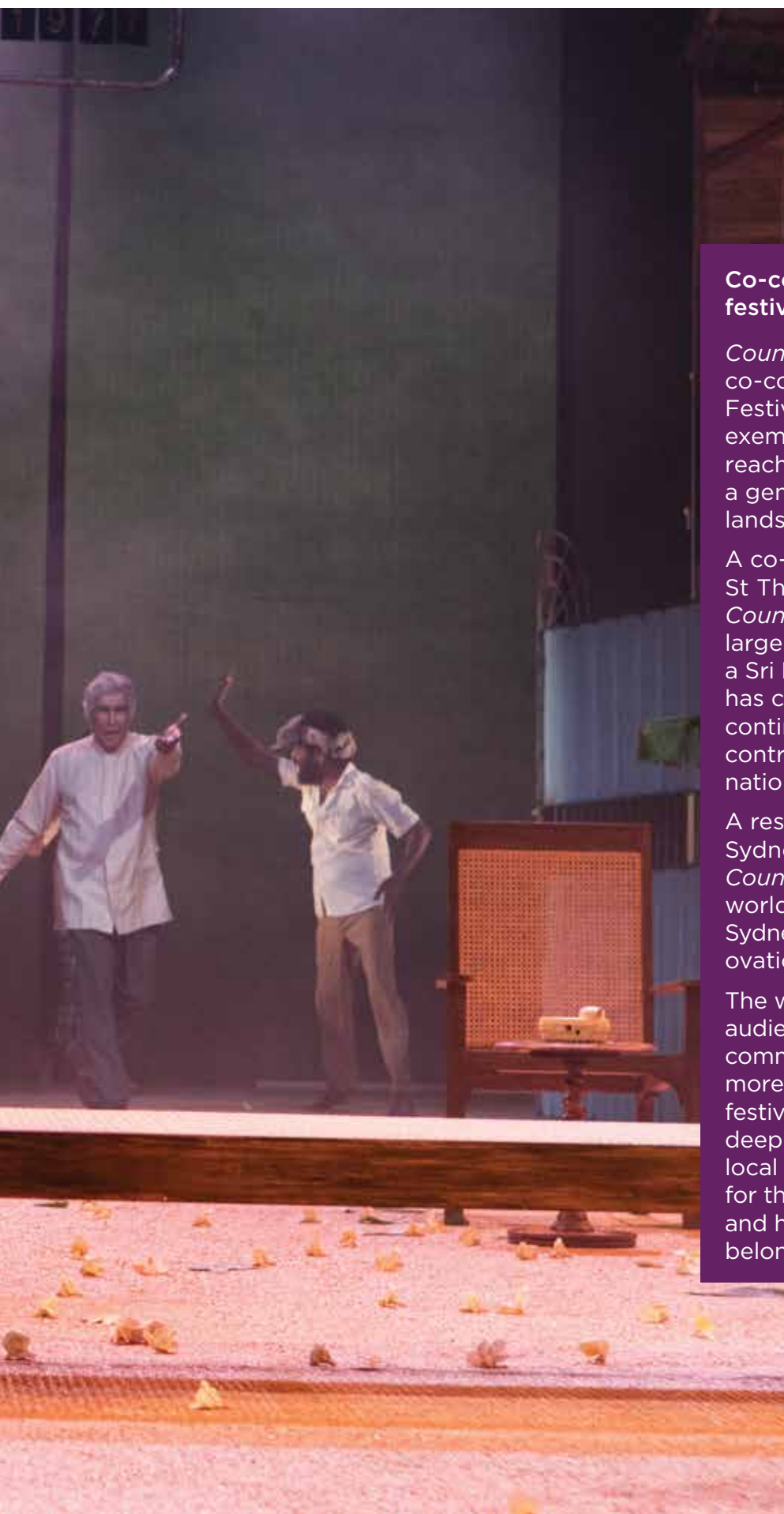
The festival includes open artist studios and workshops, where visitors are encouraged to participate, not just observe. SALA includes an Open Studio Weekend, with additional opening times over the festival, where visitors can meet local artists and visit their work spaces.



The Bait Fringe performance, SALA (South Australian Living Artists) Festival Finissage Party 2018. Credit: Sam Roberts.

¹⁷ South Australian Living Artists (SALA) Festival 2019, viewed 5 November 2019. <https://www.salafestival.com>





Counting and Cracking
Belvoir St Theatre and Co-Curious
co-production 2019. Credit: Brett Boardman.

Co-commissioned works by major festivals increase audience reach

Counting and Cracking, co-commissioned by the Sydney Festival and Adelaide Festival, exemplifies the power of art to reach new audiences and create a genuinely inclusive cultural landscape.


A co-production by Belvoir St Theatre and Co-Curious, *Counting and Cracking* is a large-scale theatrical work telling a Sri Lankan-Australian story which has connected communities and continents and made a profound contribution to our unfolding national story.

A resounding success at both the Sydney and Adelaide Festivals, *Counting and Cracking* sold out its world premiere season at the 2019 Sydney Festival, followed by standing ovations at the Adelaide Festival.¹⁸

The work speaks to an exciting new audience and the power of genuine community engagement. It attracted more than the traditional or 'typical' festival goers, including having a deep and profound impact on the local Sri Lankan community who saw for the first time their families' stories and histories placed where they belong, as part of Australia's story.

¹⁸ Australia Council for the Arts 2019, *Annual Report 2018-19*, October 2019, Sydney. <https://www.australiacouncil.gov.au/about/annual-report-2018-19>





Sydney is the most visited location on arts daytrips

The most visited tourism region for the arts in 2018 was Sydney, accounting for 16% of all arts daytrips taken.

The largest and most populous city in Australia, Sydney, like Australia's other capital cities, is home to thriving arts communities and offers a great variety of cultural and creative activities for visitors to engage in.

Beyond capital cities, the most visited tourism region was the North Coast of NSW (see table 1 on page 31).

Friends having fun with the BALLpit light projection on Cadmans Cottage, The Rocks during Vivid Sydney 2018. Credit: Destination NSW.

Different ways to look at arts tourism – volume versus the likelihood to engage

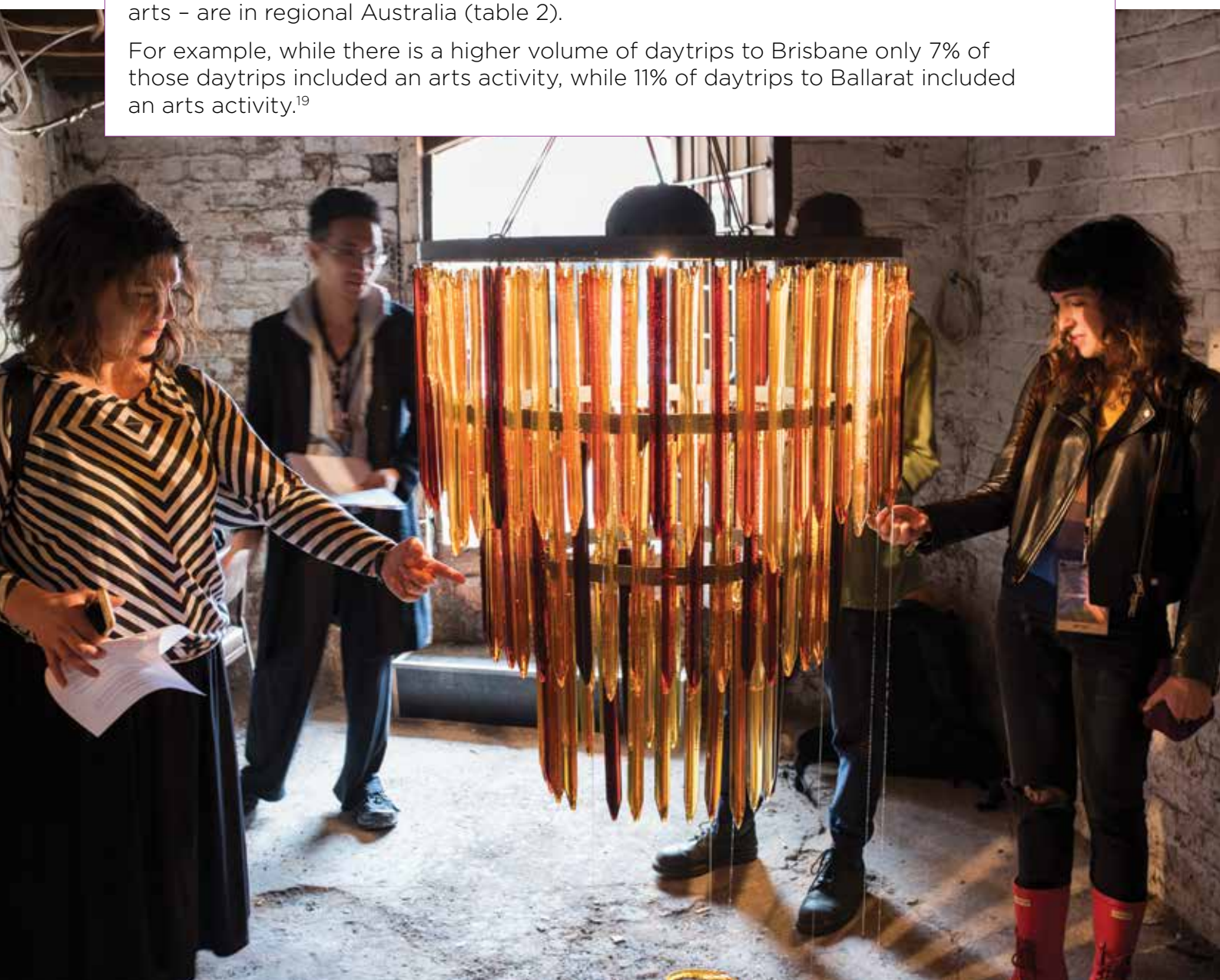
There are two ways to look at trends around engagement with the arts on domestic daytrips: the *volume of arts daytrips* that are taken to various places; and the *proportion of all daytrips to each place* that include arts activities.

The *volume* gives us a sense of overall activity in an area but does not tell the full story. The *proportion of all daytrips to each place* that include arts activities gives a fuller sense of how much the arts are a drawcard for visitation to that place.

Capital cities account for a slightly higher *volume* of arts daytrips, as they do for all daytrips.

However, the destinations where arts activities comprise a *higher proportion of the daytrips undertaken in that area* – where visitors are more likely to engage with the arts – are in regional Australia (table 2).

For example, while there is a higher volume of daytrips to Brisbane only 7% of those daytrips included an arts activity, while 11% of daytrips to Ballarat included an arts activity.¹⁹



Variations on an Energetic Field. Artist: Lucy Bleach at The Unconformity festival 2018. Photographer: Jack Robert-Tissot.

¹⁹ Data is based on a four-year average from 2015 to 2018.

Beyond capital cities, regional areas are drawing high numbers of arts tourists on daytrips

While Sydney, Melbourne and Brisbane tend to rank at the top of the most visited tourism regions for overall daytrips and arts daytrips, a range of locations throughout regional Australia are also among the most visited destinations for daytrip arts tourists. The most visited destinations vary depending on the type of arts activity (table 1).

Table 1: Most visited tourism regions on a daytrip: Total daytrips, arts daytrips and daytrips that included selected arts activities, 2015–2018²⁰

| | Total daytrips | Arts daytrips | Performing arts daytrips | Museum and art gallery daytrips | Festival daytrips |
|-----------|-----------------------|-----------------------------------|---------------------------------|--|-----------------------------------|
| 1 | Sydney (NSW) | Sydney (NSW) | Sydney (NSW) | Sydney (NSW) | Sydney (NSW) |
| 2 | Melbourne (Vic) | Melbourne (Vic) | Melbourne (Vic) | Melbourne (Vic) | Melbourne (Vic) |
| 3 | Brisbane (Qld) | Brisbane (Qld) | Brisbane (Qld) | Brisbane (Qld) | Brisbane (Qld) |
| 4 | Perth (WA) | Perth (WA) | Perth (WA) | Perth (WA) | Perth (WA) |
| 5 | Gold Coast (Qld) | North Coast NSW | Adelaide (SA) | Sunshine Coast (Qld) | Southern Queensland Country (Qld) |
| 6 | North Coast NSW | Sunshine Coast (Qld) | North Coast NSW | Bendigo Loddon (Vic) | Adelaide (SA) |
| 7 | Hunter (NSW) | Adelaide (SA) | Hunter (NSW) | Ballarat (Vic) | North Coast NSW |
| 8 | South Coast (NSW) | Hunter (NSW) | * | North Coast NSW | South Coast (NSW) |
| 9 | Sunshine Coast (Qld) | South Coast (NSW) | * | Hunter (NSW) | Hobart and the South (Tas) |
| 10 | Peninsula (Vic) | Southern Queensland Country (Qld) | * | Peninsula (Vic) | Launceston and the North (Tas) |

Note: Sample size is too small to provide data for art/craft workshop/studio daytrips and First Nations arts and craft daytrips.

* data is not publishable due to small sample sizes.

Please see page 5 for definitions of Tourism Regions.

²⁰ Data is based on a four-year average from 2015 to 2018.

Only regions with sufficient sample size have been published. Tourism regions with sample less than 40 are deemed not publishable.



Warwick's Jumpers and Jazz Festival covers the town in textile arts

The town of Warwick in Southern Queensland hosts its annual Jumpers and Jazz Festival in the winter months, brightening the town with textile arts and musicians in the streets.

Since its beginning in 2004, the festival has welcomed an increasing number of visitors. In 2018, crowd numbers were estimated to be 58,500 people, including interstate and intrastate visitors, almost double the numbers of interstate visitors compared to the previous year.²¹

Yarntopia Exhibition, Warwick Art Gallery 2019. Jumpers and Jazz Festival. Credit: Trevor Martin.

²¹ Arts Queensland 2018, Jumpers & Jazz in July Festival Case Study, June 2018. <https://www.arts.qld.gov.au/case-studies/jumpers-and-jazz-in-july-festival-2017>

Regional Queensland festivals are attracting arts tourists on daytrips

Festivals, fairs and cultural events ('festivals') are a fast-growing daytrip activity. Daytrips including festivals increased 80% since 2009.

Following capital cities, one of the most visited regions for festivals was Southern Queensland Country. Southern Queensland Country includes the regional centres of St George, Dalby and Goondiwindi.

Southern Queensland Country has both a high number of overall tourists attending festivals and a high likelihood of arts tourists attending festivals. On average since 2014, more than 150,000 daytrip visitors travelled to Southern Queensland Country per year and attended a festival, the fifth most-visited region in Australia for festivals.

Of all the arts daytrips that occurred in Southern Queensland Country, 57% included attendance at festivals.²²

The Sunshine Coast is a popular tourism region

The Sunshine Coast is a vibrant and popular tourist destination with a thriving arts community. It is the second most visited region in Queensland for the arts following Brisbane.

In 2019, the region was profiled in *Australian cultural and creative activity: A population and hotspot analysis*, an Australian Research Council Linkage project by the Queensland University of Technology and the University of Newcastle in partnership with five state government cultural funding agencies. The project involves in-depth analysis of twenty areas that have been identified as 'creative hotspots' based on local cultural and creative activity.²³

The Sunshine Coast report highlights developments and opportunities for cultural tourism including the potential for Indigenous cultural assets to underpin tourism business growth.

The Sunshine Coast Council's first-ever Arts Plan 2018–2038 was developed in consultation with more than 1,000 local artists and arts sector workers. A key feature of the plan is the Horizon Festival, launched in 2016. The ten-day festival sees the region come to life in a celebration of arts and culture, engaging locals and attracting visitors from across the country. It provides pathways for local artists to develop content, skills and networks; unique arts experiences that engage and inspire; strong social and community benefits; and direct economic impact and tourism benefits.

²² Data is based on a four-year average from 2015 to 2018.

²³ Queensland University of Technology 2019, *Australian Cultural and Creative Activity: A Population and Hotspot Analysis Sunshine Coast*, 21 October 2019. <https://research.qut.edu.au/creativehotspots/queensland>



Liam Gerner and Fru Skagerrak take a bow at the Rowella Hall on the Festival of Small Halls Summer Tour 2019. Credit: Damaris Rey Photography.

Touring festival acts are bringing great art to regional Australia

Woodford Folk Festival is a music, arts and performance event held annually over the New Year. Now in its 35th year, it is the largest gathering of artists and musicians in Australia.

More than 2,000 local, national and international, artists, musicians and presenters perform to an aggregate audience of an estimated 126,000 people in Woodfordia, Queensland.²⁴

In 2017-18, Woodford Folk Festival contributed more than \$20 million to the economy and attracted over 10,000 visitors from interstate and overseas.²⁵

The festival organisers, Woodfordia Inc. also produce the Festival of Small Halls – a touring initiative that takes artists performing at Woodford and larger festivals to regional and remote Australia, to play in local community halls and underused smaller venues.²⁶

An example of great art in regional areas, the Festival of Small Halls brings communities together, attracts visitors and supports local economies.

Tourists on daytrips in regional areas are more likely to engage with the arts than those in metropolitan areas

The likelihood of visitors to engage with the arts in a tourism region, based on the *proportion of all daytrips to each place* that include arts activities, gives a sense of how much the arts may be encouraging or drawing domestic tourism to that area.

The tourism regions with the highest *proportion* of arts daytrips have consistently been regional areas over the previous four years (table 2).

Table 2: Tourism regions with the highest proportion of arts activity for daytrips, 2015-2018²⁷

| | |
|----|-----------------------------------|
| 1 | Ballarat (Vic) |
| 2 | Canberra (ACT) |
| 3 | Bendigo Loddon (Vic) |
| 4 | North West (Tas) |
| 5 | Capital Country (NSW) |
| 6 | Sydney (NSW) |
| 7 | Adelaide Hills (SA) |
| 8 | Melbourne (Vic) |
| 9 | Hobart and the South (Tas) |
| 10 | Southern Queensland Country (Qld) |

Please see page 5 for definitions of Tourism Regions.

24 Woodford Folk Festival 2019, viewed 5 November. <https://woodfordfolkfestival.com/about/>

25 Australasian Leisure Management 2018, *2018/19 Woodford Folk Festival set to contribute more than \$20 million to the Queensland economy*, Australasian Leisure Management, 17 October 2018. <https://www.ausleisure.com.au/news/2018-19-woodford-folk-festival-set-to-contribute-more-than-20-million-to-the-queensland-economy/>

26 Festival of Small Halls 2019, viewed 5 November. <https://festivalofsmallhalls.com/>

27 Data is based on a four-year average from 2015 to 2018.

Only regions with sufficient sample size have been published. Tourism regions with sample less than 40 are deemed not publishable.

Festivals in North West Tasmania are drawing domestic arts tourists on daytrips

10% of total daytrips to North West Tasmania included an arts activity, higher than the national average of 6%.²⁸ The most popular arts daytrip activity in Tasmania overall in 2018 was attending festivals (figure 13).

The Unconformity festival celebrates the region's history

Queenstown in Tasmania's North West has a unique landscape and geology and is home to The Unconformity Festival – a contemporary multi-art form festival held biennially.²⁹ Queenstown's population of 1,800 triples during the festival, drawing up to 4,000 visitors to the historical mining town.³⁰

Works developed for the festival are unique to the region by artists who work with the natural terrain and features of the landscape. TasDance artists performed in a copper-polluted river for the 2018 Unconformity festival, acknowledging the First Nations and mining history of the area.³¹



28 Data is based on a four-year average from 2015 to 2018.

29 The Unconformity Festival 2019, viewed 5 November 2019. <https://www.theunconformity.com.au/>

30 ABC 2019, *Unconformity festival dancers make splash in Queenstown's toxic orange river*, ABC, 20 October 2019. <https://www.abc.net.au/news/2018-10-20/unconformity-festival-queenstown-tasmania-2018/10396142>

31 Ibid

Warren, A 2018, *The Unconformity festival embraces the power and peculiarity of Tasmania's wild west*, The Conversation, 2 November 2018. <https://theconversation.com/the-unconformity-festival-embraces-the-power-and-peculiarity-of-tasmanias-wild-west-106147>



The Falls. Written by Fin Kruckemeyer, Directed by Halcyon MacLeod. The Unconformity festival 2018.
Photographer: Jack Robert-Tissot

Broken Hill's vibrant art gallery is attracting major exhibitions

Touring exhibitions to regional and remote areas promote culturally vibrant regions and draw visitors to those areas. Regions rich in arts and cultural experiences attract more touring to the area.

The Broken Hill Regional Art Gallery is the oldest regional art gallery in New South Wales. The National Portrait Gallery's Travelling Exhibitions Program visited Broken Hill for the first time in 2017, during which the program received its one millionth visitor.³²

The rich opportunities of the region are supporting young First Nations artists who are developing their careers on Country. The Broken Hill Regional Art Gallery initiated the 'Fresh Bark' program, for young First Nations artists to learn from older First Nations artists and arts professionals.³³

Broken Hill Regional Art Gallery, 2019.
Credit: Tara Callaghan, Gallery and Museum Manager.

32 National Portrait Gallery of Australia 2018, *Annual Report 17/18*, September 2018, Canberra. <https://www.portrait.gov.au/document/495>

33 Volkofsky, A 2019, *Young Indigenous artists in outback New South Wales choose to stay on country to further careers*, ABC, 20 August 2019. <https://www.abc.net.au/news/2019-08-20/fresh-bark-artists-stay-on-country-broken-hill/11428304>





Culturally vibrant regional hotspots are attracting arts tourists on daytrips

Destinations within easy reach of large metropolitan centres receive large volumes of domestic arts tourists on daytrips. Regions including Capital Country (NSW) and Bendigo Loddon (Victoria) are culturally vibrant regional ‘hotspots’ for the arts.³⁴

Arts and creative activities can be a drawcard for visitors, and these regional hotspots have both a high volume, and high likelihood of tourists attending arts activities while there.

One of the most popular regions, Capital Country, south west of Sydney, includes the Southern Highlands of NSW and the towns of Bowral and Goulburn. One in ten daytrips to Capital Country included an arts activity (9%).³⁵

Bendigo is 90-minute drive from Melbourne and is home to many creative and cultural businesses and arts experiences. The Bendigo Loddon region includes the smaller towns surrounding Bendigo and was the eleventh most visited region for arts daytrips in 2018 with 10% of daytrips to the region including an arts activity.³⁶

Repurposed spaces can become regional cultural hubs

A former woollen mill in the Bendigo Loddon tourism region, The Mill Castlemaine, attracts visitors to the region with food, artisan markets and artists workshops.

The Mill’s artisan precinct is a space for tenants and stallholders to share their craft and artists to showcase their spaces and studios, as well as offering arts and craft workshops to engage visitors.

Also in Castlemaine, Lot19 Art Space is home to 21 artist studio spaces as well as a contemporary art gallery and outdoor sculpture park. Studios include Castlemaine Press, a community access print-making studio; and Castlemaine Clay a community access ceramics studio.³⁷

Community involvement in artist spaces fosters community social cohesion and the opportunity to engage visitors to Castlemaine. Artists can share their craft, and the public can share and contribute to their own understanding of art, creativity and the region.

Homage to the Castlemaine Woollen Mill workers – Libre Hem, 2017.
Credit: Denise Button, The Mill Castlemaine.

³⁴ Regional hotspots in this section differ from those identified in the QUT population and hotspot analysis also discussed in this report.

³⁵ Data is based on a four-year average from 2015 to 2018.

³⁶ Ibid.

³⁷ Lot19 Art Space, viewed 2 February 2020, <https://www.lot19art.com>





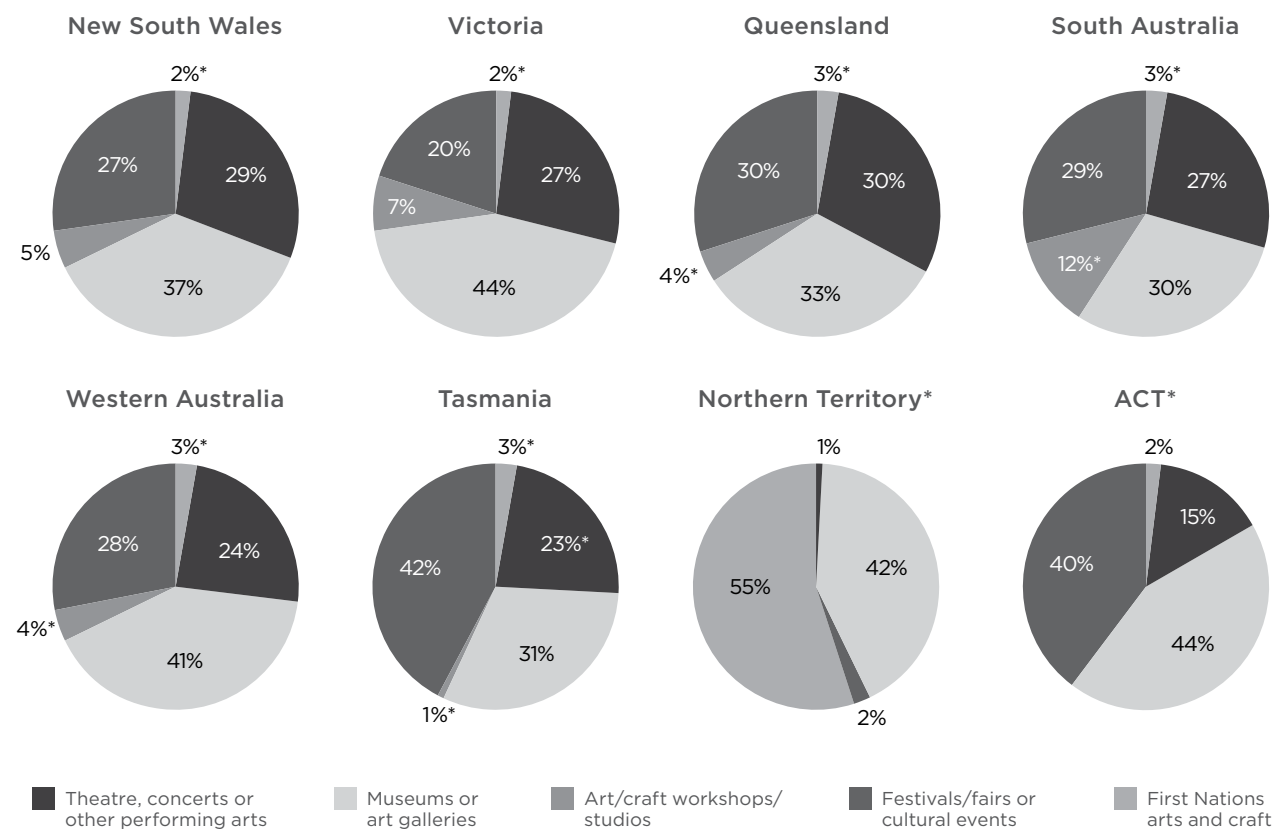
Each state and territory has a unique arts profile

There is more variability in arts tourism activities than overall tourism activities. Across states and territories, the most popular activities overall for domestic tourists on daytrips tended to be similar for each state and territory and included outdoor and social activities.

One exception is the Northern Territory where the most attended activities in 2018 were sightseeing and visiting national or state parks, while for all other states and territories it was dining out and visiting friends and relatives.

However, much like capital cities, there is variability in the make-up of arts activities attended in each state and territory.

Figure 13: Visitors' engagement with arts activities in each state and territory on a daytrip in 2018



*This data should be used with caution due to low sample sizes.

Australians are mostly taking arts daytrips within their home state

Table 3 focuses on visitors to each state and territory, and where they are travelling *from*.

Apart from the ACT and Northern Territory, daytrips to each state are predominantly, or are all, taken by residents of that state. In 2018, 100% of the daytrips to the destination states of South Australia, Western Australia and Tasmania were taken by residents of those states respectively. Daytrips to the ACT were predominantly taken from NSW (92%). One in five daytrips to the Northern Territory were taken from Western Australia (21%) (table 3).

Table 3: Where daytrip arts tourists to each state are coming from in 2018

Read table as: 91% of the arts daytrips **taken to New South Wales** were taken by residents of New South Wales, 2% were taken by residents of Victoria, 3% were taken by residents of Queensland and 4% were taken by residents of the ACT.

| | | Destination State | | | | | | | |
|------------|-----|-------------------|-----|-----|------|------|------|-----|-----|
| | | NSW | Vic | Qld | SA | WA | Tas | NT | ACT |
| Home State | NSW | 91% | 1% | 2% | 0% | 0% | 0% | 0% | 92% |
| | Vic | 2% | 98% | * | 0% | 0% | 0% | 0% | 3% |
| | Qld | 3% | 0% | 98% | 0% | 0% | 0% | 0% | 0% |
| | SA | 0% | 1% | 0% | 100% | 0% | 0% | 0% | 0% |
| | WA | 0% | 0% | 0% | 0% | 100% | 0% | 21% | 0% |
| | Tas | 0% | * | 0% | 0% | 0% | 100% | 0% | 0% |
| | NT | 0% | 0% | 0% | 0% | 0% | 0% | 79% | 0% |
| | ACT | 4% | * | 0% | 0% | 0% | 0% | 0% | 5% |

*percentages round to zero

Note: This data should be used with caution due to low sample sizes for some states.

Table 4 focuses on residents of each state, and where they are *travelling to*.

Again, it shows that daytrip arts tourists tend to travel within their home state, with the exception of the ACT - in 2018, 88% of the daytrips by residents of the ACT were to NSW.

Table 4: Where residents of each state who went on an arts daytrip travelled to in 2018

Read table as: 91% of the arts daytrips taken **by residents of New South Wales** were taken within New South Wales, 1% were taken to Victoria, 1% were taken to Queensland and 6% were taken to the ACT.

| | | Home State | | | | | | | |
|-------------------|-----|------------|-----|-----|-----|-----|------|------|-----|
| | | NSW | Vic | Qld | SA | WA | Tas | NT | ACT |
| Destination State | NSW | 91% | 2% | 5% | 0% | 0% | 0% | 0% | 88% |
| | Vic | 1% | 98% | 0% | 3% | 0% | * | 0% | 4% |
| | Qld | 1% | * | 95% | 0% | 0% | 0% | 0% | 0% |
| | SA | 0% | 0% | 0% | 97% | 0% | 0% | 0% | 0% |
| | WA | 0% | 0% | 0% | 0% | 99% | 0% | 0% | 0% |
| | Tas | 0% | 0% | 0% | 0% | 0% | 100% | 0% | 0% |
| | NT | 0% | 0% | 0% | 0% | 1% | 0% | 100% | 0% |
| | ACT | 6% | * | 0% | 0% | 0% | 0% | 0% | 8% |

*percentages round to zero

Note: This data should be used with caution due to low sample sizes for some states.

Australia's South West is the second most visited region for the arts in Western Australia, after Perth

A daytrip tourist's home state often influences where, and how far they will travel for a daytrip.

All arts daytrips to Australia's South West were taken by residents of Western Australia, due in part to the region's accessibility from Perth. The region was the second most-visited tourism region in Western Australia, both for total daytrips and arts daytrips.³⁸

There is strong and growing potential for the arts to drive tourism in the South West, with festivals, open studios and arts centres across the region (see case study on page 21).

Australia's South West is being noticed as a destination region, both domestically and internationally. Lonely Planet's Best in Asia Pacific named Margaret River and Australia's South West as a must-visit place in 2019.³⁹

Western Australia has also been in the spotlight with Qantas's direct flight between Perth and London. As well as making the region more accessible to those travelling into Australia from Europe, the South West is more visible to Australians looking for new ways of travelling to the UK and beyond. Soon-to-begin direct domestic flights into Busselton will also give Australians new ways to travel to the South West.⁴⁰

Galleries in the South West are building Western Australia's arts profile

Most daytrip arts tourists visiting Australia's South West are visiting museums and art galleries. Bunbury Regional Art Gallery (BRAG) welcomed 30,000 visitors in 2017-18 and holds major exhibitions in the South West region.⁴¹

In 2018, South West Art Now, a biennial event held at BRAG celebrated 59 artists from across the region. The next event will be known as the South Western Times Art 2020, with plans to grow the event in coming years.⁴²

38 Data is based on a four-year average from 2015 to 2018.

39 Lonely Planet 2019, Best in Asia Pacific, viewed 5 November 2019. <https://www.lonelyplanet.com/best-in-asia-pacific>

40 Lynch, J and Stephens, K 2019, *Jetstar announces new air route between Melbourne and Busselton*, ABC, 4 October 2019. <https://www.abc.net.au/news/2019-10-04/jetstar-announces-melbourne-to-busselton-flights/11574332>

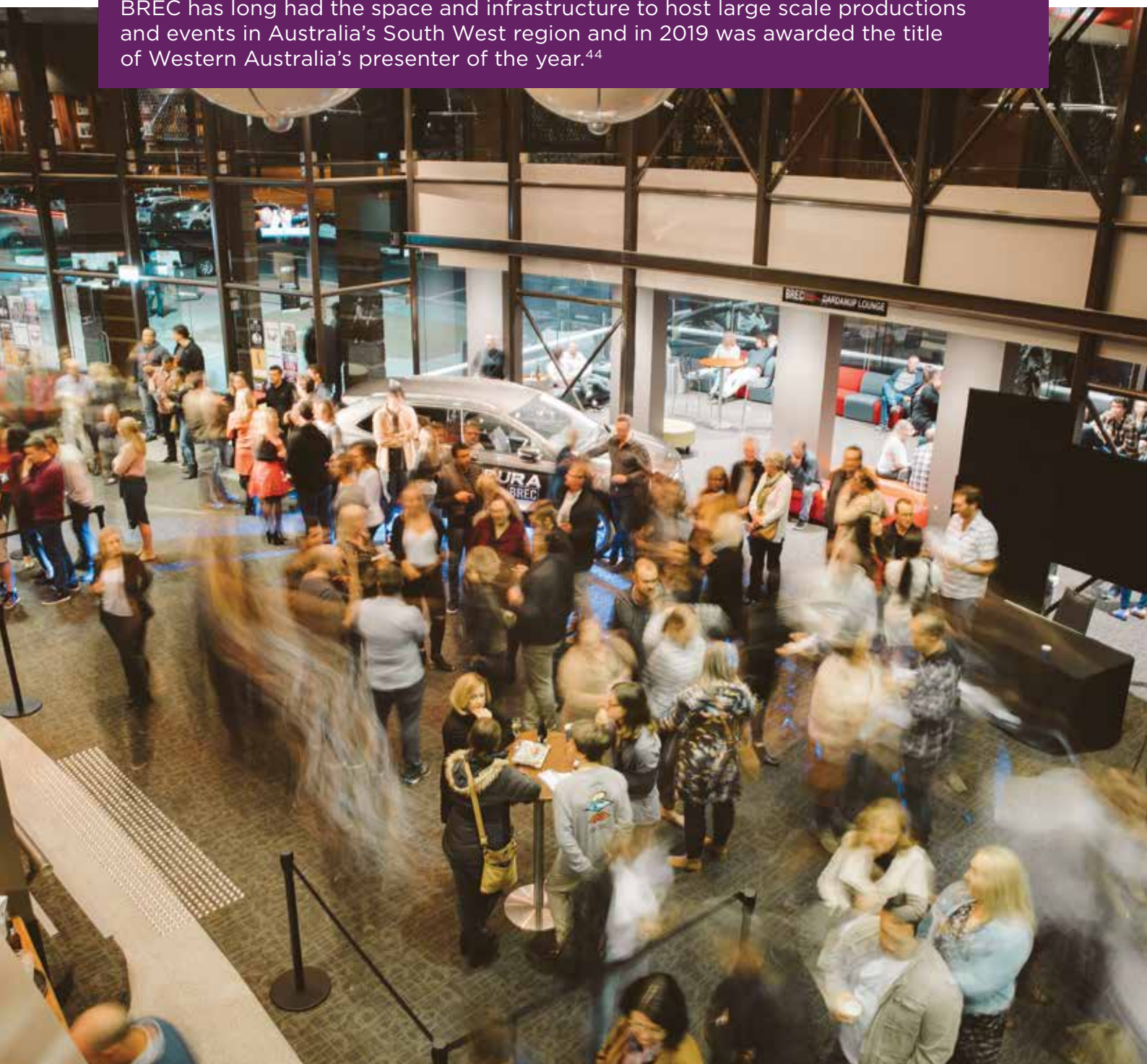
41 City of Bunbury 2018, *Annual Report 2017-2018*, October 2018, Bunbury WA. <http://www.bunbury.wa.gov.au/Pages/Reports-Plans-and-Strategies.aspx>
Bunbury Regional Art Gallery 2019, viewed 5 November 2019. <https://www.brag.org.au/about-bunbury-regional-art-galleries.html>

42 City of Bunbury 2019, *South Western Times Art 2020 - major sponsor returns to BRAG*, City of Bunbury website, 4 September 2019. <http://bunbury.wa.gov.au>

The Bunbury Regional Entertainment Centre (BREC) has the capacity to host large events in the region

The leading performance space in the region, BREC is an integral part of the community – welcoming 60,000 visitors across over 200 events each year.⁴³

BREC has long had the space and infrastructure to host large scale productions and events in Australia's South West region and in 2019 was awarded the title of Western Australia's presenter of the year.⁴⁴



BREC Foyer in Bunbury, WA for the Melbourne International Comedy Roadshow 2019. Credit: Taj Kempe.

43 Bunbury Regional Entertainment Centre 2019, About BREC, viewed 6 November 2019. <https://www.bunburyentertainment.com/about-brec>

44 Bunbury Regional Entertainment Centre 2019, viewed 6 November 2019. <https://www.bunburyentertainment.com>

Overnight trips

Activities on overnight trips

The data in this section mentions both **trip activities** and **stopover activities**.

Trip activities refers to the trip as a whole, which could include multiple stopovers in multiple locations. **Trip activities** may have happened anywhere on the trip. These activities are counted once per trip only, regardless of how many times the activity happened on the trip.

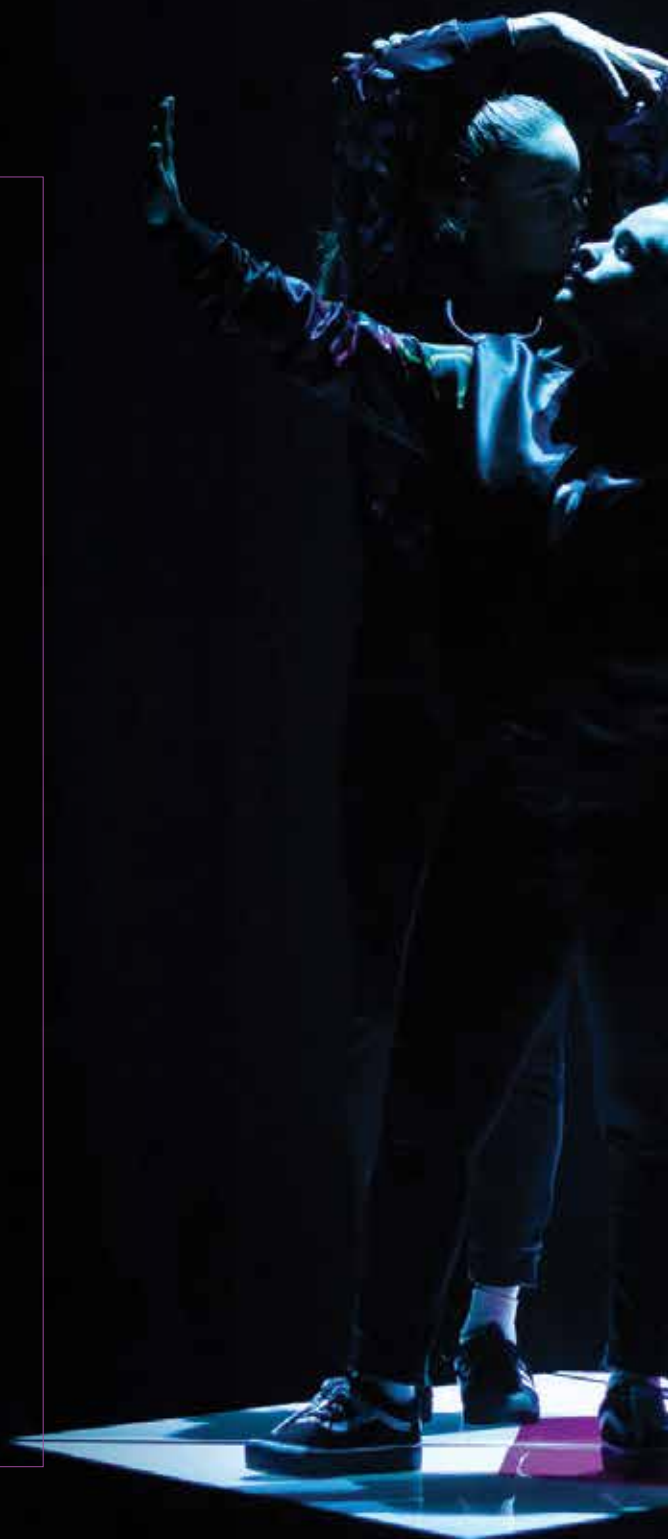
Overnight arts trips refers to overnight trips, which could include multiple stopovers in multiple locations, and which include an arts activity anywhere on the trip.

Stopover activities offer an opportunity to find out specifically *where* Australians are engaging with different activities on an overnight stopover location – such as a state or territory or tourism region.

Stopover activities are counted once per tourism region (or state or territory), where the visitor stopped overnight and undertook an activity.

In this section, we focus predominantly on **stopover activities**, that is: activities that happened on a stopover *while on an overnight trip*.

An **overnight arts stopover** is counted when an overnight tourist stopped overnight in a state or region and engaged with the arts while there. See explanatory notes for more information.





In metropolitan Australia, overnight domestic arts tourism is popular and showing strong growth

In 2018, Australians took 13.4 million overnight trips within Australia that included an arts activity ('overnight arts trips'). Overnight arts trips have grown by 71% since 2009 and by 20% since 2014.

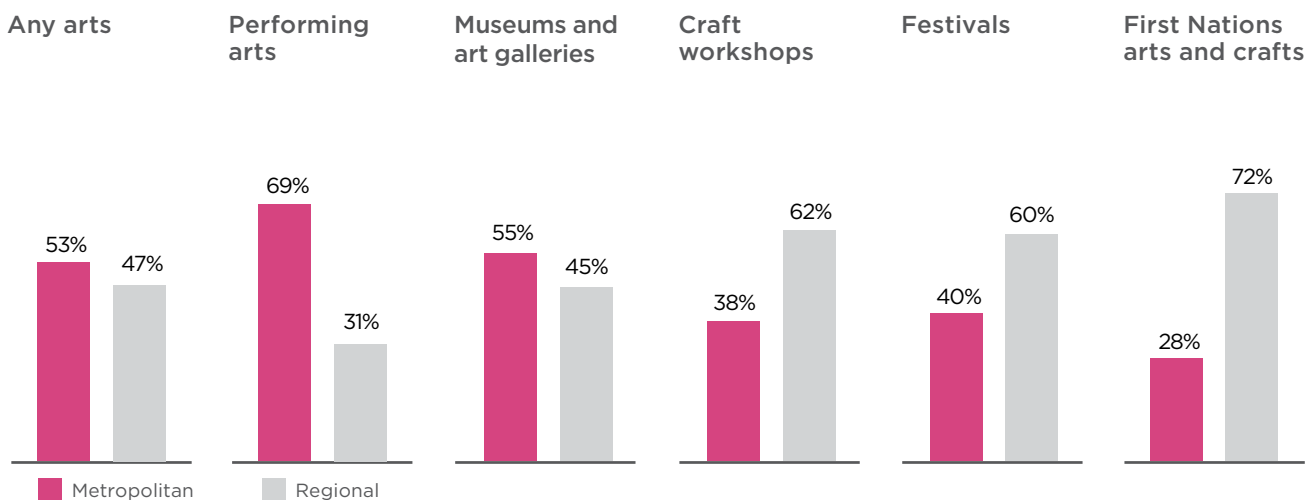
Overall engagement with the arts during overnight trips is slightly stronger in metropolitan locations compared to regional locations – both in terms of total numbers of overnight arts stopovers and the likelihood of tourists to attend arts activities in metropolitan regions.

In 2018, 53% of overnight arts trips included an overnight arts stopover in a metropolitan area, and 47% included an overnight arts stopover in a regional area (figure 14).

Also in 2018, 16% of trips with stopovers in metropolitan areas included an arts activity, while 10% of all trips with stopovers in regional Australia included an arts activity.

Similar to daytrips, the higher popularity of performing arts in capital cities is in part driving these results. Most other arts activities were more prevalent on regional overnight stopovers, particularly engagement with First Nations arts and craft (figure 14).

Figure 14: Metropolitan versus regional overnight arts stopovers on arts trips in 2018



In metropolitan areas, overnight trips including an arts stopover are growing faster than total overnight stopovers.

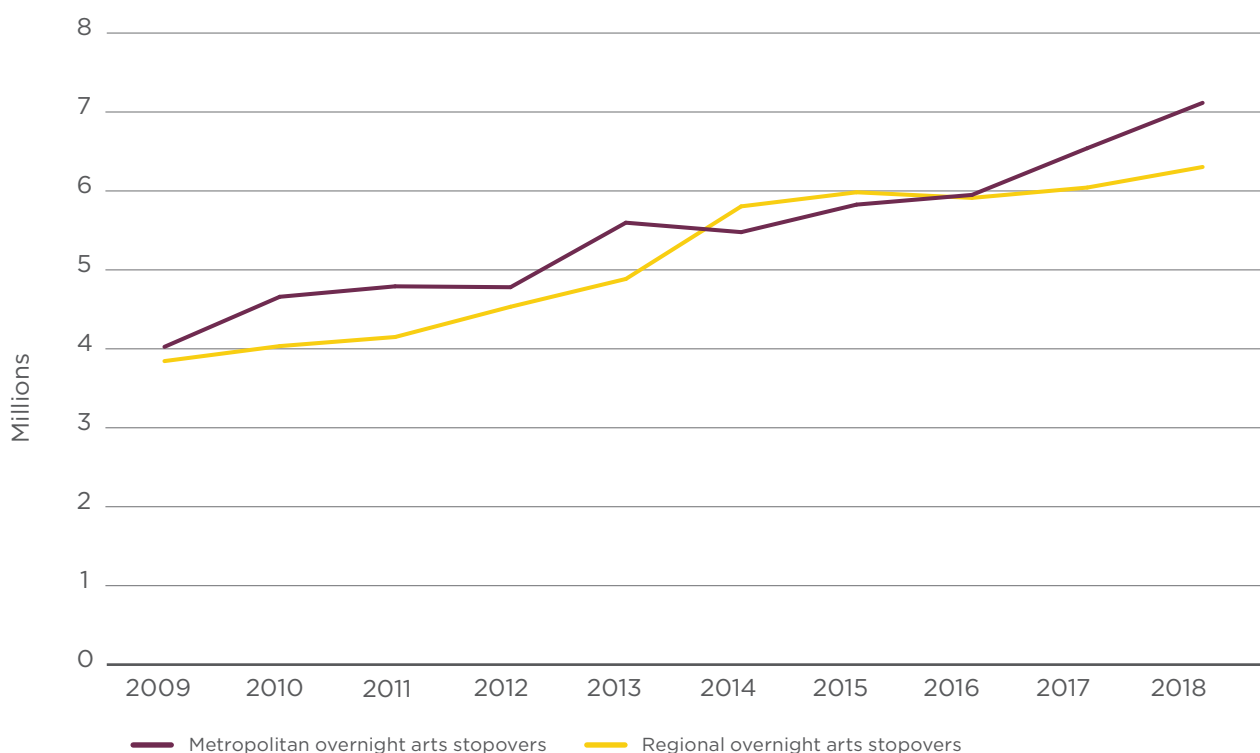
Since 2014, there has been strong growth in engagement with the arts on overnight trips to metropolitan areas. In 2018, Australians took 7.1 million trips that included an overnight arts stopover in a metropolitan area, an increase of 30% since 2014 (figure 15).

This is higher than the growth rate of all overnight trips in metropolitan areas (with or without overnight arts stopovers), which increased 25% over the same time period.

By comparison, 6.3 million domestic trips included an overnight arts stopover in regional Australia in 2018, an increase of 9% since 2014.

Activities that are generally strong in regional locations are growing in popularity in metropolitan areas. The high increase in metropolitan arts stopovers is driven by increasing engagement with arts or craft workshops and studios (+113%) and First Nations arts and craft (+65%).

Figure 15: Growth trends in metropolitan and regional overnight arts stopovers 2009–2018

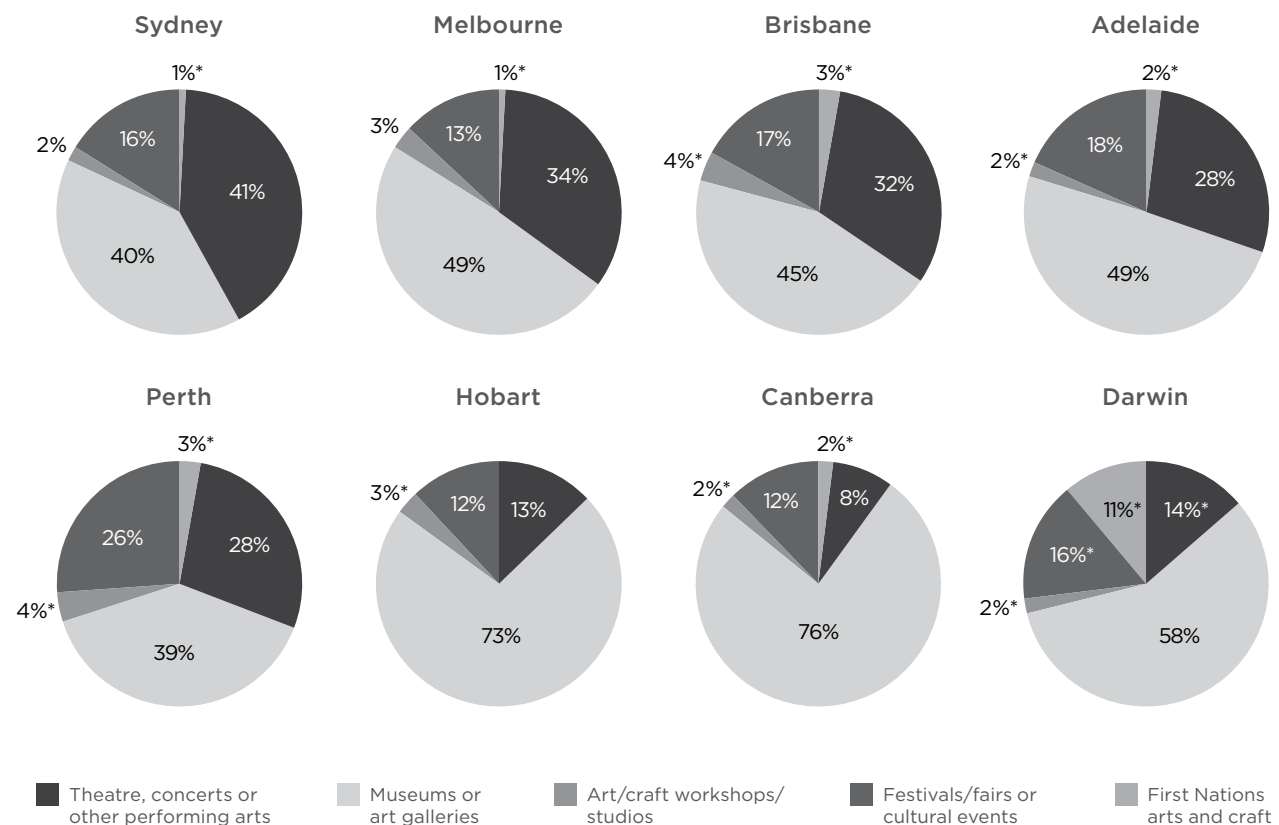


Visiting museums and art galleries is the most popular arts activity on overnight stopovers in capital cities

Like performing arts, museum and art gallery attendance was more prevalent in metropolitan areas in 2018 (figure 14).

Attending museums and art galleries was also the most common arts activity on overnight stopovers in most capital cities – especially in Canberra and Hobart where it accounted for 76% and 73% of arts engagement respectively (figure 16).

Figure 16: Visitors’ engagement with arts activities in capital cities on overnight stopovers in 2018



*This data should be used with caution due to low sample sizes.

Of all the tourist activities available in Canberra on overnight stopovers, visiting museums or galleries is the third most popular, following dining out and visiting friends and relatives. More than one in four overnight visitors to Canberra visited a museum or gallery in 2018 (27%).

Canberra’s National Collecting Institutions attract visitors from across Australia

The 12 National Collecting Institutions, including the National Gallery of Australia and National Museum of Australia welcomed 10 million visitors in 2017-18.

This included interstate and intrastate visitors who made up the 4.3 million on-site visits to the National Collecting Institutions.

Visitors from across Australia visit the National Collecting Institutions with 83% coming from metropolitan locations, and 17% from inner and outer regional Australia.⁴⁵

⁴⁵ Department of Communications and the Arts 2018, *Impact of our National Cultural Institutions 2017-18 Results*, viewed 5 November 2019. <https://www.arts.gov.au/what-we-do/museums-libraries-and-galleries/impact-our-national-cultural-institutions>



The DESIGN Canberra Festival celebrates innovation in design and craft

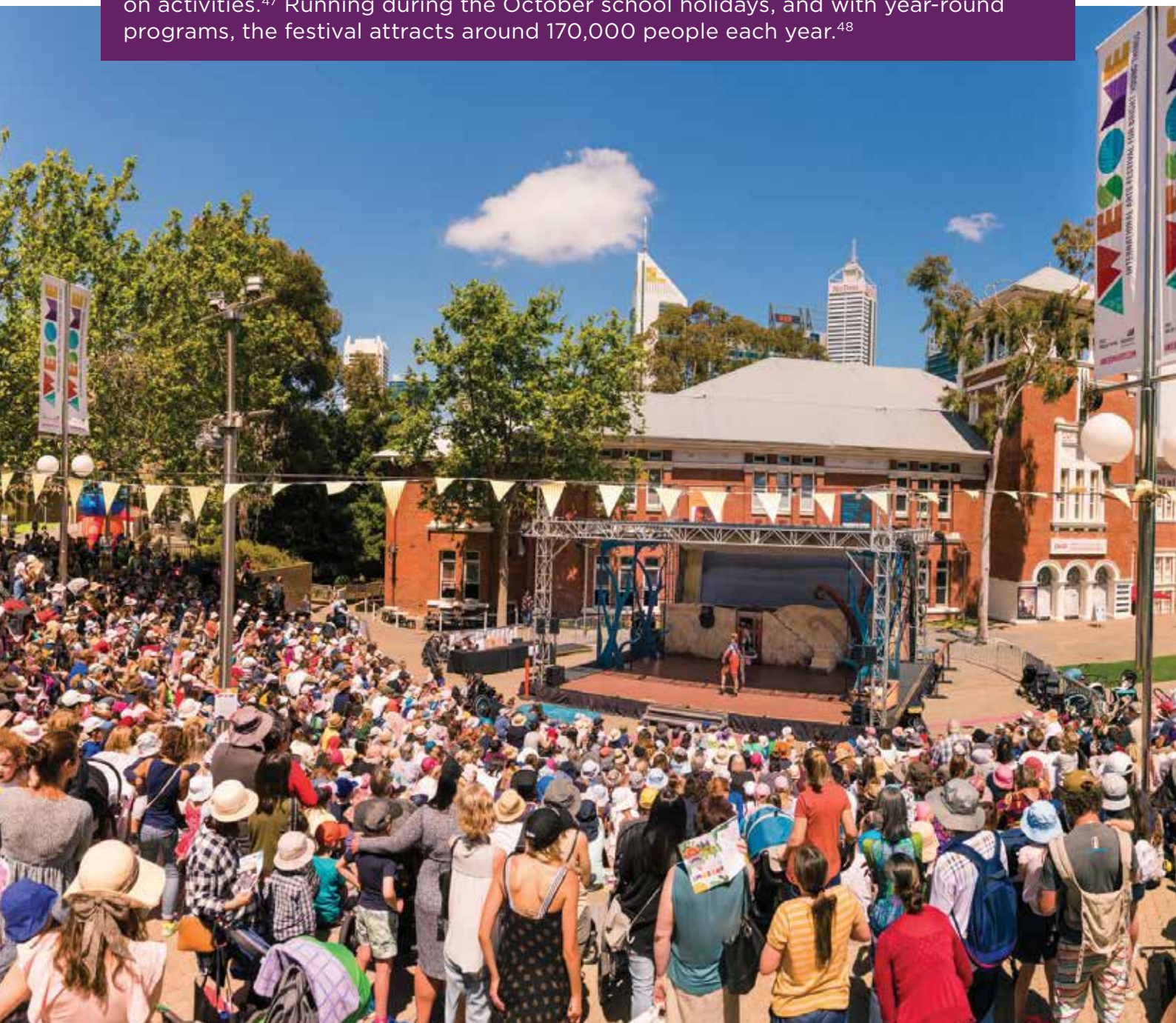
Innovative visual arts and design is renowned in Australia's capital. DESIGN Canberra celebrates and promotes design and craft in the region, drawing and expanding audiences. In 2018, the festival attracted 112,844 visitors and in 2019 topped this number again with 114,770 visitors – a record high for visitor numbers.⁴⁶

⁴⁶ Design Canberra Festival 2019, viewed 5 November 2019. <https://designcanberrafestival.com.au/about>
Design Canberra Festival 2019, Results are in - Design Canberra a success, viewed 16 January 2020. <https://designcanberrafestival.com.au/news-item/results-are-in-design-canberra-a-success>

Perth's AWESOME Festival is a drawcard for families

School holidays are an opportunity for Australian families to travel with their children, experience new and diverse destinations and experience arts and culture. In 2018, festivals made up a quarter of the arts activities engaged with in Perth on overnight stopovers – a greater proportion than any other capital city (figure 16).

Perth's long-running AWESOME Festival was established to showcase outstanding work for young audiences and involve children and young people in creative hands-on activities.⁴⁷ Running during the October school holidays, and with year-round programs, the festival attracts around 170,000 people each year.⁴⁸



AWESOME Festival 2019. Credit: Richard Watson.

47 AWESOME Festival 2019, viewed 5 November 2019. <https://awesomearts.com/about-us>

48 AWESOME Festival 2018, *Annual Report 2018*, Perth. <https://awesomeartprod.wpengine.com/wp-content/uploads/2019/06/2018-AWESOME-Annual-Report.pdf>

Regional destinations are welcoming large numbers of overnight domestic arts tourists

While the capital cities of Melbourne, Sydney and Brisbane are welcoming high numbers of tourists, regional destinations in a range of locations throughout Australia are also among the most visited destinations for overnight arts stopovers. The most visited destinations vary depending on the type of arts activity (table 5).

Table 5: Most visited tourism regions on an overnight stopover: Total overnight stopovers, arts overnight stopovers and overnight stopovers that included each arts activity 2015–2018⁴⁹

| | Total overnight stopovers | Arts overnight stopovers | Performing arts overnight stopovers | Museum and art galleries overnight stopovers | Art/craft workshops/studios overnight stopovers | Festivals overnight stopovers | First Nations arts and craft overnight stopovers |
|-----------|----------------------------------|---------------------------------|--|---|--|--------------------------------------|---|
| 1 | Sydney (NSW) | Melbourne (Vic) | Melbourne (Vic) | Melbourne (Vic) | Melbourne (Vic) | Sydney (NSW) | Lasseter (NT) |
| 2 | Melbourne (Vic) | Sydney (NSW) | Sydney (NSW) | Sydney (NSW) | Sydney (NSW) | Melbourne (Vic) | Litchfield Kakadu Arnhem (NT) |
| 3 | Brisbane (Qld) | Brisbane (Qld) | Brisbane (Qld) | Canberra (ACT) | Brisbane (Qld) | North Coast NSW | Australia's North West (WA) |
| 4 | North Coast NSW | Canberra (ACT) | North Coast NSW | Brisbane (Qld) | South Coast (NSW) | Brisbane (Qld) | Tropical North Queensland (Qld) |
| 5 | Perth (WA) | North Coast NSW | Perth (WA) | Hobart and the South (Tas) | North Coast NSW | Canberra (ACT) | Alice Springs (NT) |
| 6 | South Coast (NSW) | Hobart and the South (Tas) | Hunter (NSW) | Australia's South West (WA) | Australia's South West (WA) | Perth (WA) | Darwin (NT) |
| 7 | Hunter (NSW) | Perth (WA) | Gold Coast (Qld) | North Coast NSW | Hobart and the South (Tas) | Australia's South West (WA) | * |
| 8 | Gold Coast (Qld) | Australia's South West (WA) | Adelaide (SA) | Adelaide (SA) | * | Adelaide (SA) | * |
| 9 | Sunshine Coast (Qld) | Adelaide (SA) | Canberra (ACT) | Perth (WA) | * | Hunter (NSW) | * |
| 10 | Australia's South West (WA) | Hunter (NSW) | South Coast (NSW) | South Coast (NSW) | * | South Coast (NSW) | * |

*Data is not publishable due to small sample sizes.

Please see page 5 for definitions of Tourism Regions.

⁴⁹ Data is based on a four-year average from 2015 to 2018. Only regions with sufficient sample size have been published. Tourism regions with sample less than 40 are deemed not publishable.

The regions where overnight visitors are most likely to engage with the arts are outside the large east coast capital cities

Although a higher volume of overnight arts tourists visit capital cities, these are not the areas where overnight tourists are the most likely to engage with the arts (table 6).

The North Coast of NSW is a popular region for overnight arts tourists

The North Coast of NSW includes the towns of Byron Bay, Nambucca Heads and Coffs Harbour and is the most-visited destination region for both daytrips and overnight trips outside of capital cities.

A popular region for domestic arts tourists and tourists overall, the North Coast of NSW is the fifth most visited region for arts overnight stopovers (table 5).⁵⁰

One in ten overnight stopovers in the North Coast of NSW included an arts activity (10%).

Different ways to look at arts tourism – volume versus the likelihood to engage

There are two ways to look at trends around engagement with the arts on domestic overnight trips: the *volume of overnight arts stopovers* that are taken in various places; and the *proportion of all overnight stopovers in each place* that include arts activities.

The *volume* gives us a sense of overall activity in an area, but does not tell the full story. The *proportion of all overnight stopovers* in each place that include arts activities gives a fuller sense of how much the arts are a drawcard for visitation to that place.

Capital cities account for a slightly higher volume of overnight arts stopovers, as they do for all overnight stopovers.

However, the destinations where arts activities comprise a higher proportion of the overnight stopovers undertaken in that area – where visitors are more likely to engage with the arts – are in regional Australia.

For example, while there is a higher volume of overnight stopovers in Sydney (NSW), only 16% of those overnight stopovers included an arts activity compared to 37% of overnight stopovers in Lasseter (NT).⁵¹

⁵⁰ Data is based on a four-year average from 2015 to 2018.

⁵¹ Ibid.



The annual Byron Writers Festival is attracting literature fans to the region

The Byron Writers Festival contributes to Australia's vibrant literature sector and attracts visitors from around Australia. Each year, 12,000 people attend the festival across a multitude of events, and membership numbers continue to increase.

Nearly half of those who attended the Byron Writers Festival in 2018 were from outside the local region (48%), with most visitors travelling from elsewhere in NSW, South East Queensland and Victoria.

Attendees who travelled to the Byron region for the festival were also more likely to be newcomers to the festival, reflecting an increase in Australians' willingness to travel for the arts.⁵²

⁵² Byron Writers Festival 2018, *2018 Annual Report*, 2018, Byron Bay.
<https://byronwritersfestival.com/wp-content/uploads/2019/03/Byron-WF-2018-AGM-report.pdf>

Table 6: Regions with the highest proportion of arts activity on overnight stopovers, 2015–2018⁵³

| | |
|----|-------------------------------|
| 1 | Lasseter (NT) |
| 2 | Hobart and the South (Tas) |
| 3 | Canberra (ACT) |
| 4 | Alice Springs (NT) |
| 5 | Darwin (NT) |
| 6 | Spa Country (Vic) |
| 7 | Litchfield Kakadu Arnhem (NT) |
| 8 | Outback NSW |
| 9 | Melbourne (Vic) |
| 10 | Bendigo Loddon (Vic) |

Please see page 5 for definitions of Tourism Regions.

The Northern Territory is home to unique, rich and diverse First Nations arts, contemporary expressions of the world's oldest continuing culture. Research by Tourism NT found that 85% of respondents believe that the Northern Territory is the best place to experience First Nations culture.⁵⁴

First Nations arts and craft make up nearly a third of all arts activities attended on overnight stopovers in the Northern Territory (figure 17).

The most visited tourism regions for overnight stopovers including First Nations arts and craft are in regional areas of the Northern Territory, Western Australia or Queensland (table 5). Additionally, four of the top ten regions where tourists were most likely to engage in an arts activity are in the Northern Territory (table 6).

Australians are travelling to the Northern Territory to experience First Nations arts and craft

First Nations arts and craft continue to be a growing component of the itineraries of Australians travelling to the Northern Territory. Greater information, such as the Territory Arts Trail, increases the accessibility and visibility of First Nations art centres and significant First Nations landmarks.⁵⁵ To attract tourists, the Northern Territory has been billed as 'The world's biggest art gallery.'⁵⁶

Art centres play a vital role in First Nations communities and art economies in remote locations, and in supporting tourism. Art production is the main source of commercial income for many remote communities with art centres.⁵⁷

Australian audiences have a strong appetite for contemporary First Nations art.⁵⁸ Desert Mob brings together art centres from across Central Australia in Alice Springs including an exhibition, symposium and marketplace, sharing new works and ideas in contemporary First Nations arts. Desert Mob is presented by Araluen Arts Centre and Desart, the peak body for 35 Aboriginal owned and operated Art Centres in Central Australia an area that includes the Northern Territory, South Australia and Western Australia. Celebrating its 30th anniversary in 2020, Desert Mob's bustling marketplace atmosphere provides an opportunity for buyers to interact directly with artists and art centre staff and to purchase high quality works of art.⁵⁹

53 Data is based on a four-year average from 2015 to 2018.

Only regions with sufficient sample size have been published. Tourism regions with sample less than 40 are deemed not publishable.

54 Northern Territory Government Department of Tourism and Culture 2017, *National demand for cultural tourism in Australia*, Northern Territory Government Department of Tourism and Culture. <http://tourismnt.com.au/en/research/topical-research>

55 Northern Territory 2019, Territory Arts Trail, viewed 5 November 2019. <https://northernterritory.com/things-to-do/art-and-culture/territory-arts-trail>

56 Lauren Moss, Minister for Tourism, Sport and Culture, 2019, *Turbocharged Territory Art Campaign to Boost Tourism*, Media release, 4 February 2019. <http://newsroom.nt.gov.au/mediaRelease/28652>

57 Woodhead A and Acker T 2014, *The Art Economies Value Chain reports: Synthesis*, CRCREP Research Report CR004, Ninti One Limited, Alice Springs.

58 Australia Council for the Arts 2015, *Building Audiences: Aboriginal and Torres Strait Islander Arts*, August 2015, Sydney. <https://www.australiacouncil.gov.au/workspace/uploads/files/research/building-audiences-australia-c-55d5097058187.pdf>

59 Desart 2019, Desert Mob, viewed 5 November 2019. <https://desart.com.au/desert-mob>





Arts engagement on overnight stopovers is strongest in Lasseter – home to Uluru

The Lasseter region of the Northern Territory – home to Uluru – is the overnight stopover destination where visitors are most likely to attend an arts activity out of all tourism regions in Australia.⁶⁰

Tourists in Lasseter are nearly three times more likely to engage with the arts than overnight tourists overall. Over one third of tourists who stopped in the Lasseter region engaged in the arts while they were there (37%).⁶¹ In comparison, 13% of tourists on overnight stopovers across Australia engage with the arts.

Those who visit Uluru are likely to also engage with First Nations arts and craft while there – the high level of arts engagement in Lasseter is driven by engagement in First Nations arts and crafts.

Lasseter is the most-visited destination region for overnight stopovers including a First Nations arts and craft activity – more than a quarter (27%) of tourists who stopped overnight in the region engaged with First Nations arts and craft.⁶²

The Litchfield Kakadu Arnhem region is a popular overnight stopover destination

The Litchfield Kakadu Arnhem region also has a high likelihood of tourists engaging with the arts. Covering the northernmost part of the Northern Territory, excluding Darwin, the Litchfield Kakadu Arnhem region is known for its bark paintings and rock art.

Litchfield Kakadu Arnhem is the second most-visited destination region for overnight stopovers including a First Nations arts and craft activity. Nearly one in seven (68%) overnight arts stopovers in the region included engagement with First Nations arts and craft.⁶³

60 Please see page 5 for definitions of Tourism Regions.

61 Data is based on a four-year average from 2015 to 2018.

62 Ibid.

63 Ibid.



Collective Vision, Bill Conroy at Bendigo Art Gallery. Credit: Peter Clarke.

Smaller capital cities are drawing high numbers of overnight domestic arts tourists

The capital cities of Hobart, Darwin and Canberra have welcomed large numbers of overnight tourists who are highly likely to engage with the arts while there (see table 6).

Over 860,000 travellers visited Canberra in 2018 and attended an arts activity on an overnight stopover. Of all the overnight stopovers that occurred in Canberra, 31% included an arts activity (see also case studies on pages 50–51 and 64).

In 2018, nearly 490,000 domestic tourists visited Hobart and attended an arts activity on an overnight stopover – 30% of total overnight visitors to Hobart.

Based on average data over the past four years, Canberra and Hobart are the fourth and sixth most visited regions for the arts respectively.⁶⁴ (see table 5 on page 53)

Also in 2018, 153,000 domestic tourists visited Darwin and attended an arts activity on an overnight stopover. Of all the overnight stopovers that occurred in Darwin, 22% included an arts activity.

⁶⁴ Data is based on a four-year average from 2015 to 2018.

2019 Darwin Aboriginal Art Fair, Children's Workshop with Anindilyakwa Arts. Credit: Dylan Buckee.

The Darwin Aboriginal Art Fair is one of the largest meetings of artists, art buyers and tourists in Australia

In 2018, First Nations art and craft accounted for 11% of the arts activities that visitors engaged with in Darwin on overnight stopovers, greater than any other capital city in Australia (figure 16). In addition, attendance at festivals on overnight stopovers in the Northern Territory has grown 83% since 2014.

The Darwin Aboriginal Art Fair (DAAF) is a festival that brings together 70 art centres and represents the artwork of over 2,000 First Nations artists from across Australia with an estimated 14,000 visitors in 2018. The fair also contributed an estimated \$15 million to the local economy.⁶⁵

The DAAF, and the art centres involved, present visitors the opportunity to purchase First Nations art ethically, ensuring all proceeds go directly to artists and art centres.

In 2019 the DAAF showcased the collaboration between designer Gorman and Mangkaja Arts, highlighting the intersections between vibrant contemporary First Nations arts and fashion.⁶⁶



65 Ashton, K 2019, *Darwin Aboriginal Art Fair draws thousands as artists fight unethical dealers*, ABC, 14 August 2019. <https://www.abc.net.au/news/2019-08-12/darwin-aboriginal-art-fair-sees-biggest-ever-crowds-in-top-end/11404456>

Darwin Festival 2019, Darwin Aboriginal Art Fair, viewed 5 November 2019. <https://www.darwinfestival.org.au/events/darwin-aboriginal-art-fair>

66 Nurick, J 2019, *Why you should visit the Darwin Aboriginal Art Fair: from Country to Couture show*, Vogue Australia, 2 August 2019. <https://www.vogue.com.au/culture/why-you-should-visit-the-darwin-aboriginal-art-fair-from-country-to-couture-show/news-story/bade542b215b4fe01c29bb109a22bb24>

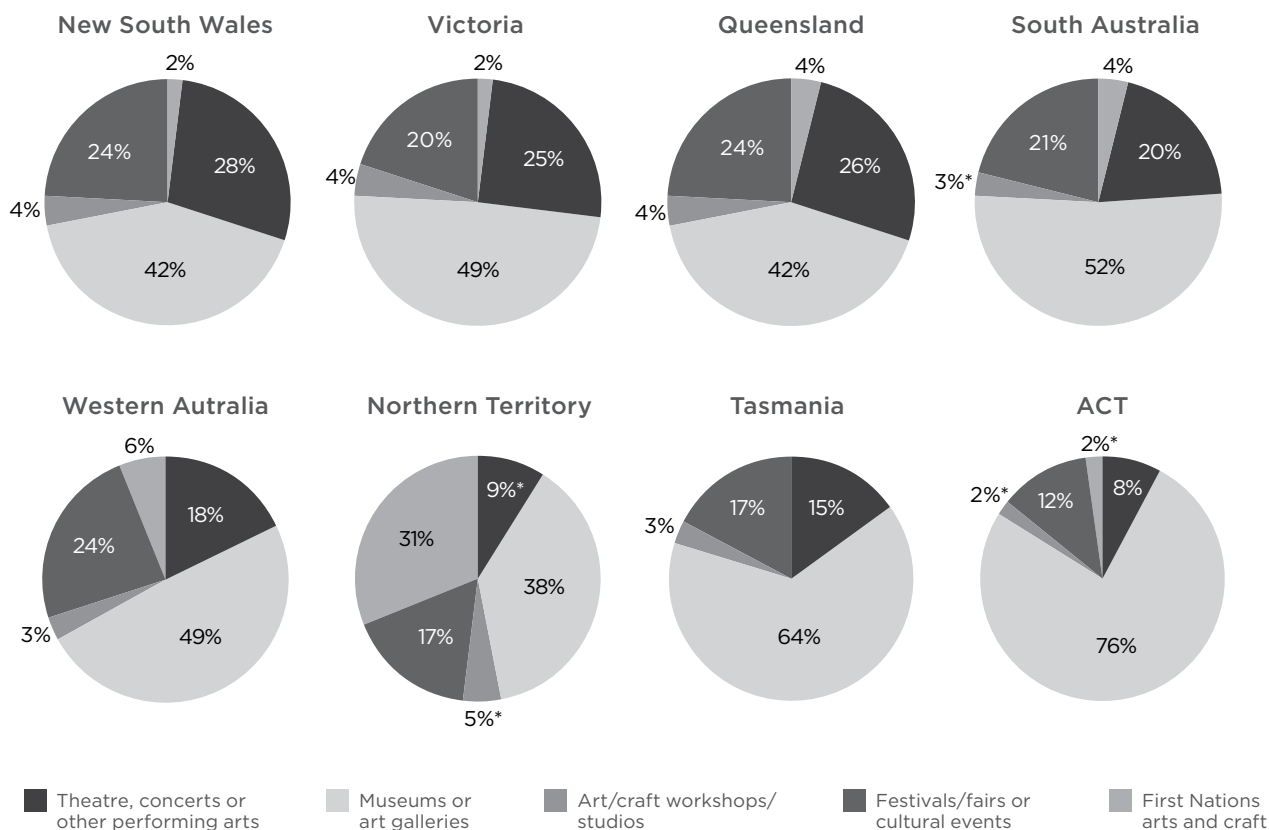




States and territories each have their own unique arts offerings

The mix of activities visitors engage with on overnight arts stopovers differs between each state and territory (figure 17).

Figure 17: Visitors' engagement with arts activities in each state and territory on overnight stopovers in 2018



*This data should be used with caution due to low sample sizes.

Almost one in three overnight stopovers in the ACT included an arts activity in 2018

Visitors to the ACT are highly likely to engage with the arts. In 2018, nearly one in three of all overnight stopovers in the ACT included an arts activity (31%), more than double the national average of 13%.

Canberra Glassworks gives visitors the opportunity to watch artists at work

Watching artists at work is an immersive and unique experience. Visitors to Canberra Glassworks have the opportunity to watch glass artists at work and learn about the processes of glass blowing, neon, kiln forming and casting.

As well as the ability to view glass artists working, Canberra Glassworks presented eight exhibitions and welcomed 84,000 visitors through its doors in 2019.⁶⁷

Mitch Mahoney (Boonwurrung and Barkindji), *Lines on Country* (work in progress), 2019, sandcast and engraved glass, courtesy of the Artist and Vivien Anderson Gallery. Credit: Canberra Glassworks.

⁶⁷ Source: Canberra Glassworks





Festivals make up a quarter of arts engagement on overnight stopovers in Queensland

24% of all arts activities undertaken in Queensland on overnight stopovers in 2018 were festivals (figure 17).

2019 was named Queensland's year of Outback Tourism

The Queensland region where visitors were most likely to engage with the arts on an overnight stopover was Outback Queensland. Of those who visited Outback Queensland on an overnight stopover, 14% engaged with the arts.⁶⁸

The Queensland Government declared 2019 the Year of Outback Tourism, celebrating the outback and encouraging visitors to explore the region.⁶⁹

Outback festivals draw tourists to regional and remote areas. The Big Red Bash Festival in Birdsville, on the edge of the Simpson Desert in Outback Queensland, is the world's most remote music festival.⁷⁰

The Big Red Bash also includes an arts and entertainment program for children – in 2019 this was the Big Red Rumble, exclusively for kids at the festival. Kids at the 2019 Big Red Bash worked with musicians and bands to create a performance piece to be rehearsed and performed at the festival.⁷¹

Also in 2019, the Central West region in Queensland was profiled in *Australian cultural and creative activity: A population and hotspot analysis*, an Australian Research Council Linkage project being undertaken by the Queensland University of Technology and the University of Newcastle, in partnership with five state government cultural funding agencies. The project involves in-depth analysis of twenty areas that have been identified as 'creative hotspots' based on local cultural and creative activity.⁷²

The report identifies that tourism activity has become increasingly a mainstay of a local economy facing big challenges, including the major psychological and economic depressive effects of long-term drought. It highlights a very professional, resilient and sustainable tourism ecosystem which effectively links cultural and creative activity with heritage, science and cultural infrastructure as well as traditional industries such as agriculture.

68 Data is based on a four-year average from 2015 to 2018.

69 Queensland Government 2018, 2019 The Year of Outback Tourism, Media Statement, 16 December 2018, viewed 5 November 2019. <http://statements.qld.gov.au/Statement/2018/12/16/2019-the-year-of-outback-tourism>

70 Birdsville Big Red Bash 2019, viewed 5 November 2019, <https://www.bigredbash.com.au/bigredbash/index>

71 Birdsville Big Red Bash 2019, Big Red Rumble, viewed 5 November 2019, <https://www.bigredbash.com.au/bigredbash/big-red-rumble>

72 Queensland University of Technology 2019, Australian Cultural and Creative Activity: A Population and Hotspot Analysis Central West Queensland: Blackall-Tambo, Longreach and Winton, 1 August 2019. <https://research.qut.edu.au/creativehotspots/queensland>

Big Red Bash, Birdsville QLD. Credit: Matt Williams.





Overnight domestic arts tourists travelling interstate are more likely to engage with the arts

In 2018, Australians took 7.2 million trips that included an overnight arts stopover in their home state compared to 6 million overnight arts trips interstate.

While a higher *volume* of arts tourists take overnight arts stopovers within their own state, Australians are *more likely* to engage with the arts on an overnight stopover interstate.

For tourists travelling further from home, engaging with the arts is a way to learn about and understand a place that is different from where they live.

In 2018, 18% of all overnight trips with stopovers interstate involved arts engagement, compared to 10% of all overnight trips with stopovers within the same state, and 13% of overnight trips overall.

Table 7 shows where overnight domestic arts tourists were travelling *from*.

It shows that people travel *from* all states and territories on overnight trips with arts stopovers.



AWESOME Festival 2019. Credit: Richard Watson.

Table 7: Where tourists on overnight arts trips to each state and territory are coming from in 2018

Read table as: 60% of overnight trips with an **overnight arts stopover in NSW** were taken by residents of NSW, 14% were taken by residents of Victoria and 13% were taken by residents of Queensland.

| | | Destination State | | | | | | | |
|------------|-----|-------------------|-----|-----|-----|-----|-----|-----|-----|
| | | NSW | Vic | Qld | SA | WA | Tas | NT | ACT |
| Home State | NSW | 60% | 21% | 20% | 14% | 8% | 20% | 26% | 67% |
| | Vic | 14% | 57% | 11% | 21% | 7% | 27% | 20% | 17% |
| | Qld | 13% | 8% | 61% | 7% | 5% | 10% | 12% | 9% |
| | SA | 3% | 4% | 2% | 50% | 2% | 6% | 7% | 3% |
| | WA | 2% | 4% | 3% | 2% | 77% | 4% | 9% | 1% |
| | Tas | 1% | 3% | 1% | 2% | * | 31% | * | 2% |
| | NT | 1% | 1% | 1% | 2% | * | 1% | 24% | * |
| | ACT | 6% | 2% | 1% | 1% | 1% | 2% | 1% | 0% |

*percentages round to zero

Note: This data should be used with caution due to low sample sizes.

Table 8 focuses on residents of each state and territory, and where they are travelling to. It shows that residents travel to all states and territories on overnight trips with arts stopovers.

Table 8: Where residents of each state and territory are taking overnight arts trips to in 2018

Read table as: 54% of **NSW residents who went on an overnight arts trip** stopped overnight in NSW, 15% stopped overnight in Victoria and 10% stopped overnight in Queensland.

| | | Home State | | | | | | | |
|-------------------|-----|------------|-----|-----|-----|-----|-----|-----|-----|
| | | NSW | Vic | Qld | SA | WA | Tas | NT | ACT |
| Destination State | NSW | 54% | 18% | 22% | 16% | 7% | 9% | 13% | 68% |
| | Vic | 15% | 57% | 11% | 18% | 11% | 26% | 18% | 21% |
| | Qld | 10% | 7% | 57% | 7% | 5% | 6% | 10% | 7% |
| | SA | 2% | 5% | 2% | 48% | 2% | 4% | 9% | 3% |
| | WA | 2% | 2% | 2% | 2% | 69% | 1% | * | 2% |
| | Tas | 3% | 6% | 3% | 5% | 2% | 54% | 2% | 3% |
| | NT | 2% | 2% | 2% | 3% | 3% | * | 48% | 1% |
| | ACT | 13% | 4% | 3% | 4% | 1% | 4% | 1% | 0% |

*percentages round to zero

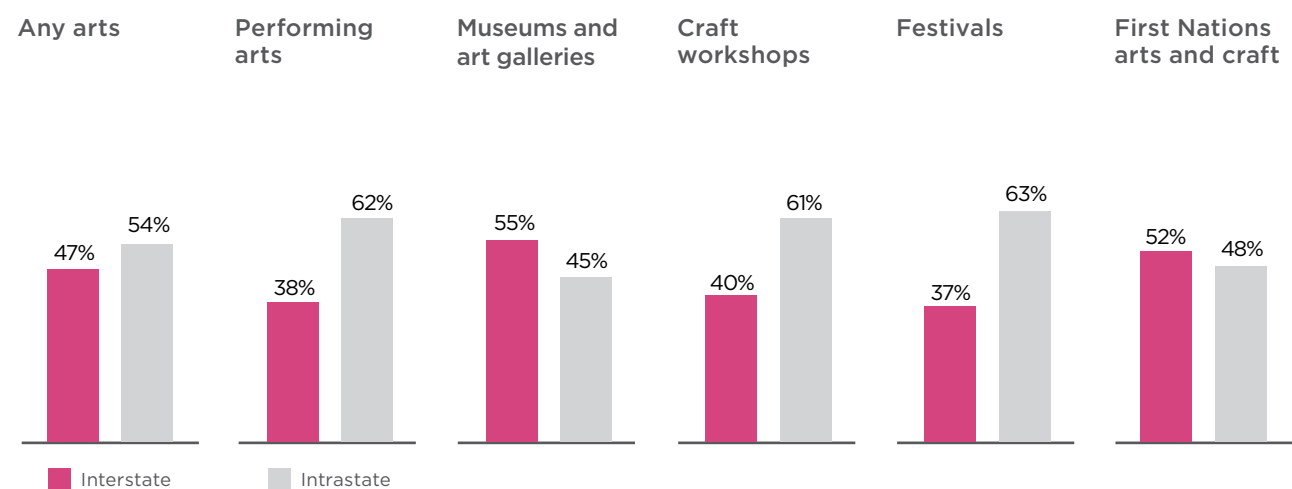
Note: This data should be used with caution due to low sample sizes.



AWESOME Festival 2019, Mask Family - Homunculus Theatre. Credit: Richard Watson.

Figure 18 shows that 54% of all overnight arts trips were intrastate, driven by performing arts, craft workshops and festivals. Trips including museums and art galleries and First Nations arts and crafts were more likely to be undertaken interstate.

Figure 18: Interstate and intrastate overnight trips with arts stopovers by arts activity in 2018



Note: due to rounding, percentages may not add to 100%

State and territory analysis

NSW

Daytrips

- In 2018 there were 62.3 million daytrips taken to or within NSW, an increase of 20% since 2014. 3.9 million of those daytrips included an arts activity (6%, the same as the national average).
- Arts daytrips to NSW increased 13% since 2014, less than the overall increase in daytrips to NSW. The increase in arts daytrips to NSW is in line with the increase in total arts daytrips to anywhere in Australia (14%).
- Daytrip activities that saw the biggest increase in attendance in NSW since 2014 were exercise, gym or swimming (+300%), visiting wineries (+56%) and visiting history/heritage buildings, sites or monuments (+54%).⁷³
- The most visited region in NSW for the arts, following Sydney, is the North Coast of NSW. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was Capital Country (9% of visitors engaged with the arts).⁷⁴

Residents of NSW

- 47% of NSW residents who had gone on an arts daytrip within NSW went to Sydney, 8% went to the Hunter, 7% went to the North Coast of NSW and 7% went to the South Coast of NSW, the most-visited regions in the state for arts daytrip arts tourists from NSW.⁷⁵
- 6% of all daytrips taken by residents of NSW in 2018 included an arts activity, on par with the national average of 6%.

Overnight trips

- In 2018 there were 34.8 million trips that included an overnight stopover in NSW, an increase of 31% since 2014. 4.1 million of those stopovers included an arts activity (12%, slightly less than the national average).
- Trips including overnight arts stopovers in NSW increased 20% since 2014, less than the overall increase in overnight stopovers in NSW. However, the increase in overnight stopovers in NSW is in line with the increase in total overnight arts stopovers anywhere in Australia (20%).
- Overnight stopover activities that saw the biggest increase in attendance in NSW since 2014 were exercise, gym or swimming (+119%), visiting botanical or other public gardens (+80%) and visiting history/heritage buildings, sites or monuments (+66%).⁷⁶
- The most visited region in NSW for the arts on an overnight stopover, following Sydney, is the North Coast of NSW. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Outback NSW (19% of visitors engaged with the arts).⁷⁷

Residents of NSW

- The most popular destination regions for overnight arts tourists from NSW were Sydney (18%), Melbourne (13%) and Canberra (12%).⁷⁸
- 13% of all overnight stopovers taken by residents of NSW in 2018 included an arts activity, on par with the national average (13%).

⁷³ Only activities with sufficient sample size are listed.

⁷⁴ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

⁷⁵ Data is based on a four-year average from 2015 to 2018.

⁷⁶ Only activities with sufficient sample size are listed.

⁷⁷ Data is based on a four-year average from 2015 to 2018.

⁷⁸ Ibid.

Victoria

Daytrips

- In 2018 there were 56.0 million daytrips taken to or within Victoria, an increase of 29% since 2014. 3.7 million of those daytrips included an arts activity (7%, slightly higher than the national average of 6%).
- Arts daytrips to Victoria increased by 24% since 2014, less than the overall increase in daytrips to Victoria. However, it is 10 percentage points higher than the average increase in arts daytrips to anywhere in Australia (14%).
- Daytrip activities that have seen the biggest increase in attendance in Victoria since 2014 were exercise, gym or swimming (+410%), bushwalking or rainforest walks (+100%) and visiting national parks/state parks (+79%).⁷⁹
- The most visited region in Victoria for the arts, following Melbourne, is Bendigo Loddon. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was Ballarat (11% of visitors engaged with the arts).⁸⁰

Residents of Victoria

- 42% of Victorians who went on an arts daytrip went to Melbourne, 7% went to Ballarat and 7% went to Bendigo Loddon, the three most-visited regions in the state for Victorian daytrip arts tourists.⁸¹
- 7% of all daytrips taken by residents of Victoria in 2018 included an arts activity, greater than the national average of 6%.

Overnight trips

- In 2018 there were 26.2 million trips that included an overnight stopover in Victoria, an increase of 32% since 2014. 3.4 million of those stopovers included an arts activity (13%, the same as the national average).
- Trips including overnight arts stopovers in Victoria increased 26% since 2014, less than the overall increase in overnight arts stopovers in Victoria. However, the increase in overnight stopovers in Victoria is greater than the increase in overnight arts stopovers anywhere in Australia (20%).
- Overnight stopover activities that saw the biggest increase in attendance in Victoria since 2014 were exercise, gym or swimming (+153%), visiting botanical or other public gardens (+72%) and snow sports (+71%).⁸²
- The most visited region in Victoria for the arts on an overnight stopover, following Melbourne, is Bendigo Loddon. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Melbourne (19% of visitors engaged with the arts).⁸³

Residents of Victoria

- The most popular destination regions for overnight arts tourists from Victoria were Melbourne (17%), Sydney (9%) and the Great Ocean Road (6%).⁸⁴
- 13% of all overnight stopovers taken by residents of Victoria in 2018 included an arts activity, on par with overnight tourists overall (13%).

79 Only activities with sufficient sample size are listed.

80 Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

81 Data is based on a four-year average from 2015 to 2018.

82 Only activities with sufficient sample size are listed.

83 Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

84 Data is based on a four-year average from 2015 to 2018.

Queensland

Daytrips

- In 2018 there were 43.9 million daytrips taken to or within Queensland, an increase of 13% since 2014. 2.4 million of those daytrips included an arts activity (6% – the same as the national average).
- Arts daytrips to Queensland increased 20% since 2014, increasing at a greater rate than overall daytrips to Queensland and total arts daytrips to anywhere in Australia (14%).
- Daytrip activities that have seen the biggest increase in attendance in Queensland since 2014 are visiting botanical or other public gardens (122%), bushwalking or rainforest walks (58%) and festivals, fairs and cultural events (49%).⁸⁵
- The most visited region in Queensland for the arts, following Brisbane, is the Sunshine Coast. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was Southern Queensland Country (7% of visitors engaged with the arts).⁸⁶

Residents of Queensland

- 46% of Queensland residents who went on an arts daytrip went to Brisbane, 14% went to the Sunshine Coast and 12% went to Southern Queensland Country, the three most-visited regions in the state for daytrip arts tourists from Queensland.⁸⁷
- 6% of all daytrips taken by residents of Queensland in 2018 included an arts activity, on par with the national average of 6%.

Overnight trips

- In 2018 there were 23.6 million trips that included an overnight stopover in Queensland, an increase of 20% since 2014. 2.3 million of those stopovers included an arts activity (10%, slightly below the national average).
- Trips including overnight arts stopovers in Queensland increased 23% since 2014, more than the overall increase in overnight stopovers in Queensland and the overall increase in overnight arts stopovers anywhere in Australia (20%).
- Overnight stopover activities that saw the biggest increase in attendance since 2014 were exercise, gym or swimming (+77%), visiting botanical or other public gardens (+57%) and visiting a reef (+48%).
- The most visited region in Queensland for the arts on an overnight stopover, following Brisbane, is the Gold Coast. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Outback Queensland (14% of visitors engaged with the arts).⁸⁸

Residents of Queensland

- The most popular destination regions for overnight arts tourists from Queensland in 2018 were Brisbane (21%), Melbourne (11%) and Sydney (10%).⁸⁹
- 11% of all overnight stopovers taken by residents of Queensland in 2018 included an arts activity.

⁸⁵ Only activities with sufficient sample size are listed.

⁸⁶ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

⁸⁷ Data is based on a four-year average from 2015 to 2018.

⁸⁸ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

⁸⁹ Data is based on a four-year average from 2015 to 2018.

South Australia

Daytrips

- In 2018 there were 13.4 million daytrips taken to or within South Australia, an increase of 9% since 2014. 700,000 of those daytrips included an arts activity (5%, slightly lower than the national average of 6%).
- Arts daytrips to South Australia increased 14% since 2014, increasing at a greater rate than overall daytrips to South Australia and at the same rate as the increase in overall arts daytrips to anywhere in Australia (14%).
- Daytrip activities that have seen the biggest increase in attendance in South Australia since 2014 were visiting botanical or other public gardens (+103%), bushwalking or rainforest walks (+44%) and visiting national parks or state parks (+39%).⁹⁰
- The most visited region in South Australia for the arts, following Adelaide, is the Fleurieu Peninsula. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was Adelaide Hills (8% of visitors engaged with the arts).⁹¹

Residents of South Australia

- 39% of South Australian residents who had gone on an arts daytrip went to Adelaide, 20% went to the Fleurieu Peninsula and 13% went to the Adelaide Hills, the most-visited regions in the state for daytrip arts tourists from South Australia.⁹²
- 5% of all daytrips taken by residents of South Australia in 2018 included an arts activity.

Overnight trips

- In 2018 there were 6.6 million trips that included an overnight stopover in South Australia, an increase of 15% since 2014. 760,000 of those stopovers included an arts activity (12%, slightly below the national average).
- Trips including overnight arts stopovers in South Australia increased 9% since 2014, less than the overall increase in overnight stopovers in South Australia and the overall increase in overnight arts stopovers anywhere in Australia (20%).
- Overnight stopover activities that saw the biggest increase in attendance in South Australia since 2014 were exercise, gym or swimming (+148%) and visiting botanical or other public gardens (+102%).⁹³
- The most visited region in South Australia for the arts on an overnight stopover, following Adelaide, is the Flinders Ranges and Outback. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Kangaroo Island (16% of visitors engaged with the arts).⁹⁴

Residents of South Australia

- The most popular destination regions for overnight arts tourists from South Australia in 2018 were Melbourne (17%), Adelaide (13%) and Sydney (10%).⁹⁵
- 13% of all overnight stopovers taken by residents of South Australia in 2018 included an arts activity, on par with overnight tourists overall (13%).

⁹⁰ Only activities with sufficient sample size are listed.

⁹¹ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

⁹² Data is based on a four-year average from 2015 to 2018.

⁹³ Only activities with sufficient sample size are listed.

⁹⁴ Data is based on a four-year average from 2015 to 2018.

⁹⁵ Ibid.

Western Australia

Daytrips

- In 2018 there were 20.2 million daytrips taken to or within Western Australia, a decrease of 1% since 2014. 949,000 of these daytrips included an arts activity (5%, slightly lower than the national average of 6%).
- Arts daytrips to Western Australia decreased 18% over the last five years. Tourism to Western Australia in general dipped in the year ending 2018.
- Daytrip activities that have seen the biggest increase in attendance in Western Australia since 2014 were national parks/state parks (+91%), bushwalking or rainforest walks (+31%) and sightseeing (+30%).⁹⁶
- The most visited region in Western Australia for the arts, following Perth, is Australia's South West. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was Perth (5% of visitors engaged with the arts).⁹⁷

Residents of Western Australia

- 73% of WA residents who went on an arts daytrip went to Perth and 18% went to Australia's South West, the most-visited regions in the state for daytrip arts tourists from Western Australia.⁹⁸
- 5% of all daytrips taken by residents of WA in 2018 included an arts activity.

Overnight trips

- In 2018 there were 9.9 million trips that included an overnight stopover in Western Australia, an increase of 1% since 2014. 1.0 million of those stopovers included an arts activity (10%, slightly below the national average).
- Trips including overnight arts stopovers in Western Australia decreased 6% since 2014.
- Overnight stopover activities that saw the biggest increase in attendance in Western Australia since 2014 were cycling (+83%), exercise, gym or swimming (+58%) and visiting botanical or other public gardens (+56%).⁹⁹
- The most visited region in Western Australia for the arts on an overnight stopover, following Perth, is Australia's South West. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Australia's South West (13% of visitors engaged with the arts).¹⁰⁰

Residents of Western Australia

- The most popular destination regions for overnight arts tourists from Western Australia in 2018 were Australia's South West (29%), Perth (23%) and Melbourne (10%).¹⁰¹
- 12% of all overnight stopovers taken by residents of Western Australia in 2018 included an arts activity.

⁹⁶ Only activities with sufficient sample size are listed.

⁹⁷ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

⁹⁸ Data is based on a four-year average from 2015 to 2018.

⁹⁹ Only activities with sufficient sample size are listed.

¹⁰⁰ Data is based on a four-year average from 2015 to 2018.

¹⁰¹ Ibid.

Tasmania

Daytrips

- In 2018 there were 6.3 million daytrips taken to or within Tasmania, an increase of 15% since 2014. 381,000 of these daytrips included an arts activity (6%, the same as the national average).
- Arts daytrips to Tasmania increased by 6% since 2014, less than the increase in overall daytrips to Tasmania and the overall increase in arts daytrips anywhere in Australia (14%).
- Daytrip activities that saw the biggest increase in attendance in Tasmania since 2014 are going to the beach (+94%), picnics or BBQs (+82%) and sightseeing (+52%).¹⁰²
- The most visited region in Tasmania for the arts, following Hobart, is the North West. The daytrip region where visitors were most likely (regardless of visitor volume) to engage with the arts was the North West (10% of visitors engaged with the arts).¹⁰³

Residents of Tasmania

- 42% of Tasmanian residents who had gone on an arts daytrip went to Hobart and the South, 27% went to the North West of Tasmania and 25% went to Launceston and the North, the most-visited regions in the state for daytrip arts tourists from Tasmania.
- 6% of all daytrips taken by residents of Tasmania in 2018 included an arts activity, on par with the national average of 6%.

Overnight trips

- In 2018 there were 3.0 million trips that included an overnight stopover in Tasmania, an increase of 34% since 2014. 690,000 of those stopovers included an arts activity (23%, nearly double the national average).
- Trips including overnight arts stopovers in Tasmania increased 29% since 2014, less than the increase in total overnight stopovers in Tasmania over the same time period. However the increase in overnight arts stopovers in Tasmania is greater than the increase in total overnight arts stopovers anywhere in Australia (20%).
- The overnight trip activities that saw the biggest increase in attendance in Tasmania since 2014 were attending theatre, concerts or other performing arts (+134%) and exercise, gym or swimming (+133%).¹⁰⁴
- The most visited region in Tasmania for the arts on an overnight stopover, following Hobart, is Launceston and the North. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Hobart and the South (32% of visitors engaged with the arts).¹⁰⁵

Residents of Tasmania

- The most popular destination regions for overnight arts tourists from Tasmania were Melbourne (27%), Hobart and the South (22%) and Launceston and the North (10%).¹⁰⁶
- 16% of all overnight stopovers taken by residents of Tasmania included an arts activity, meaning they are more likely to engage with the arts than overnight tourists overall (13%).

¹⁰² Only activities with sufficient sample size are listed.

¹⁰³ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

¹⁰⁴ Only activities with sufficient sample size are listed.

¹⁰⁵ Data is based on a four-year average from 2015 to 2018.

¹⁰⁶ Ibid.

Northern Territory

Daytrips

- In 2018 there were over one million daytrips taken to or within the Northern Territory, a decrease of 30% since 2014. 63,000 of these daytrips included an arts activity (6%, the same as the national average).¹⁰⁷
- Daytrip activities that have seen the biggest increase in attendance in the Northern Territory since 2014 visiting friends and relatives (+51%) and dining out (+21%).¹⁰⁸

Residents of Northern Territory

- 5% of all daytrips taken by residents of the Northern Territory in 2018 included an arts activity.¹⁰⁹

Overnight trips

- In 2018 there were 1.5 million trips that included an overnight stopover in the Northern Territory, an increase of 5% since 2014. 350,000 of those trips included an arts activity (23%, nearly double the national average).
- Trips including overnight arts stopovers in the Northern Territory increased 2% since 2014, slightly less than the overall increase in overnight stopovers in the Northern Territory over the same time period, and less the overall average increase in overnight arts stopovers anywhere in Australia (+20%).
- Overnight stopover activities that saw the biggest increase in attendance in the Northern Territory since 2014 were exercise, gym or swimming (+23%), sightseeing (+19%) and visiting an Aboriginal site or community (+8%).¹¹⁰
- The most visited region in the Northern Territory for the arts on an overnight stopover, following Darwin, is Lasseter. The region where visitors were most likely (regardless of visitor volume) to engage with the arts on an overnight stopover was Alice Springs (26% of visitors engaged with the arts).¹¹¹

Residents of Northern Territory

- The most popular destination regions for overnight arts tourists from the Northern Territory in 2018 were Litchfield Kakadu Arnhem (17%), Darwin (13%) and Melbourne (12%).¹¹²
- 17% of all overnight stopovers taken by residents of the Northern Territory included an arts activity, meaning they are more likely to engage with the arts than overnight tourists overall (13%).¹¹³

¹⁰⁷ Due to low sample sizes, please use this data with caution.
Arts daytrip sample is too low to publish percentage changes or tourism regions for the Northern Territory.

¹⁰⁸ Only activities with sufficient sample size are listed.

¹⁰⁹ Due to small sample sizes, please use this data with caution.
Data for which regions residents of the NT are travelling to on arts daytrips is not publishable due to small sample sizes.

¹¹⁰ Only activities with sufficient sample size are listed.

¹¹¹ Data is based on a four-year average from 2015 to 2018. Please note that only regions with sufficient sample size are listed.

¹¹² Data is based on a four-year average from 2015 to 2018.

¹¹³ Data for which regions residents of the NT are travelling to on overnight arts trips is not publishable due to small sample sizes.

ACT

Daytrips

- In 2018 there were 2.2 million daytrips taken to or within the ACT, an increase of 24% since 2014. 270,000 of these daytrips included an arts activity (12%, double the national average of 6%).¹¹⁴
- Daytrip activities that have seen the biggest increase in attendance in the ACT since 2014 were dining out (+46%) and visiting friends and relatives (+25%).¹¹⁵

Residents of the ACT

- 8% of all daytrips taken by residents of the ACT in 2018 included an arts activity, more than the national average of 6%.¹¹⁶

Overnight trips

- In 2018 there were 2.8 million trips that included an overnight stopover in the ACT, an increase of 23% since 2014. 860,000 of those stopovers included an arts activity (31%, more than double the national average).
- Trips including overnight arts stopovers in the ACT increased 34% since 2014, increasing at a greater rate than overall overnight stopovers in the ACT and total overnight arts stopovers anywhere in Australia over the same time period (+20%).
- Trips including overnight arts stopovers in the ACT increased at the highest rate of all states and territories.
- The overnight stopover activities that saw the biggest increase in attendance in the ACT since 2014 were visiting museums and art galleries (+43%), dining out (+42%) and sightseeing (+42%).¹¹⁷

Residents of the ACT

- The most popular destination regions for overnight arts tourists from the ACT were Sydney (37%), Melbourne (17%) and the South Coast of NSW (12%).¹¹⁸
- 14% of all overnight stopovers taken by residents of the ACT included an arts activity, meaning they are more likely to engage with the arts than overnight tourists overall (13%).

¹¹⁴ Due to low sample sizes, please use this data with caution. Arts daytrip sample is too low to publish percentage changes for the ACT. Sample is too low to publish growth data for arts activities.

¹¹⁵ Only activities with sufficient sample size are listed.

¹¹⁶ Data for which regions residents of the ACT are travelling to on arts daytrips is not publishable due to small sample sizes.

¹¹⁷ Only activities with sufficient sample size are listed.

¹¹⁸ Data is based on a four-year average from 2015 to 2018.

Additional resources

Key domestic arts tourism findings are detailed in this report. For more information on domestic tourism in Australia more broadly, visit the Tourism Research Australia website <https://www.tra.gov.au/domestic>.

For state and territory tourism resources, please visit the individual state or territory websites:

NSW

- [Create NSW](#)
- [Destination NSW](#)

Victoria

- [Creative Victoria](#)
- [Visit Victoria](#)

Queensland

- [Arts QLD](#)
- [Tourism and Events Queensland](#)

South Australia

- [Arts South Australia](#)
- [South Australian Tourism Commission](#)

Western Australia

- [Western Australia Department of Culture and the Arts](#)
- [Tourism Western Australia](#)

Northern Territory

- [Arts NT](#)
- [Tourism NT](#)

Tasmania

- [Arts Tasmania](#)
- [Tourism Tasmania](#)

ACT

- [Arts ACT](#)
- [Visit Canberra](#)

Kim Williams, Lucas Ihlein, Simon Mattsson, and Kim Kleidon, *Sunset Symphony in the Sunflowers*, Sakwolo Islander Dancers performing with audience and community members on Simon Mattsson's sugarcane and sunflower farm, Mackay, Queensland, 2017. Photo: Cherrie Hughes.



Explanatory notes

For both daytrips and overnight trips, total domestic trip and domestic arts trip numbers were gathered from Tourism Research Australia (TRA)'s National Visitor Survey (NVS). The NVS surveys 120,000 Australian Residents aged 15 years and over each year through a Computer Assisted Telephone Interviewing (CATI) system with phone numbers selected using random digit dialling.

For more information, please see TRA's NVS Methodology information <https://www.tra.gov.au/Domestic/national-visitor-survey-methodology>

From the NVS database, estimates at the levels of national, state/territory, tourism region, capital cities and Gold Coast, and rest of Australia, were drawn for the following for both domestic daytrips and overnight trips:

- The total number of domestic tourists who were classified as domestic arts tourists based on having attended at least one arts activity while on a domestic trip
- Domestic arts tourists as a proportion of total domestic tourists
- The numbers and proportions of total domestic tourists who had undertaken specific activities while on a domestic trip
- The numbers and proportions of total domestic tourists and domestic arts tourists who had visited a state/territory, capital city and Gold Coast, rest of Australia, and undertaken a specific activity while there
- The numbers and proportions of total domestic tourists and domestic arts tourists who were from each state and territory
- The numbers and proportions of total domestic tourists and domestic arts tourists split by age group, gender and reason for trip

Time periods for analysis

To ensure sufficient sample sizes for analysis, this report looks at two time periods.

Unless otherwise specified, analysis at the national, state and territory, capital city tourism regions and metropolitan and regional levels, is based on data for the 2018 calendar year. All other tourism region data is reported as four-year average data from YE December 2015 to YE December 2018.

The following table defines these time periods

| | |
|-------------------------------------|---------------------------------------|
| National | 2018 |
| State and territory | 2018 |
| Capital city tourism regions | 2018 |
| Metropolitan and regional | 2018 |
| All other tourism regions | Four-year average data from 2015–2018 |

Please check footnotes for more data-specific information.

The 2018 data in this report was extracted from the TRA Online database between July 2019 and September 2019 and was correct at the time of the March 2019 quarter data release of the NVS.

Four-year average data from 2015–2018 was provided directly by TRA.

A complete picture of domestic arts tourism

Measuring value in the arts can present challenges including data limitations which can lead to gaps in capturing insights. TRA data only tells part of the story. This is why we include a number of other sources such as case studies – so that a broader picture of domestic arts tourism can be built.

Heritage buildings are a popular form of *cultural* tourism

Visiting history/heritage buildings, sites or monuments are sometimes included the definition of arts and cultural tourism in other arts research.

While not included as an arts activity in this report, 3% of total domestic daytrips and 6% of domestic overnight trips included visiting a history/heritage building, site or monument in 2018.

Tourism Research Australia's tourism regions

All regions in Australia are creatively vibrant and are home to rich arts experiences. In this research, specific tourism regions have been highlighted for their relatively high numbers and proportions of visitors engaging with arts activities in those regions.

Tourism regions are defined in consultation with the relevant national and state/territory tourism organisations. Each tourism region is constructed from allocations of whole Statistical Area Level 2s (SA2s), which are small spatial units of the Australian Statistical Geography Standard (ASGS). There are 77 tourism regions in Australia.

The Australian Bureau of Statistics (ABS) manages the ASGS. More information and tourism region maps can be found at <https://www.tra.gov.au/regional/tourism-regions>

Activities on domestic trips

Activities undertaken by Australian residents on domestic trips are reflective of data collected by TRA for 52 predetermined activity categories in the NVS.

The term 'domestic arts tourist' is not a mutually exclusive category. Domestic arts tourists may have undertaken a number of other activities while on a domestic trip.

Daytrips

The location of daytrip activities may not always be the same as the daytrip destination. However, it is expected it will be the same tourism region in most cases for the types of cultural and creative activities described in this report. Therefore, it is reasonable to associate the daytrip destination region as the location of the activity.

Overnight trips

The data in this report focuses both on trip activities and stopover activities.

Trip activities refers to the trip as a whole, which could include multiple stopovers in multiple locations. **Trip activities** may have happened anywhere on the trip. These activities are counted once per trip only, regardless of how many times the activity happened on the trip.

Overnight arts trips refers to overnight trips, which could include multiple stopovers in multiple locations, and which include an arts activity anywhere on the trip.

Stopover activities offer an opportunity to find out specifically where Australians are engaging with different activities on an overnight stopover location – such as a state or territory or tourism region.

Stopover activities are counted once per tourism region (or state or territory), where the visitor stopped overnight and undertook an activity.

An **overnight arts stopover** is counted when an overnight tourist stopped overnight in a state or region and engaged with the arts while there.

Stopovers

A stopover is any location where the visitor had an overnight stay while on a trip. An arts tourist may have visited and had stopovers in a number of states while in Australia. At the national level each arts tourist is counted once only, although they may have attended multiple arts activities in multiple states. Each state is treated as its own distinct group of:

- tourists visiting the state or region
- arts tourists visiting the state or region

National Visitor Survey (NVS) Methodology 2019

TRA released the following information in regards to comparing estimates from previous years:

With 97% of the Australian population aged 15 years or more owning a mobile phone, Tourism Research Australia has transitioned NVS sampling to 100% mobile phone interviewing and discontinued landline sampling.

This change will improve the accuracy of national, state and territory estimates.

Note that 2017 and 2018 estimates have also been revised to align with the latest release of ABS population projections that are used to benchmark NVS results to the Australian population. Therefore, new estimates will differ from previously published figures.

For further information, see our [Changes to the National Visitor Survey in 2019](#) fact sheet.

Variable definitions

Regional and metropolitan areas of Australia

Metropolitan

The term 'Metropolitan' includes the greater metropolitan areas of Sydney, Melbourne, Brisbane, the Gold Coast, Adelaide, Perth, Hobart, Darwin and Canberra.

TRA includes the Gold Coast in its capital cities variable 'capital cities and the Gold Coast', and the Australia Council includes the Gold Coast in its categorisation of metropolitan areas.

Regional

The term 'regional' includes all areas of each state/territory outside capital cities and the Gold Coast.

Tourism Research Australia's tourism regions

Tourism Research Australia divides Australia into 77 tourism regions based on the Australian Bureau of Statistics (ABS) geography standard. Please see page 81 for more information.

Tourism regions in each state and territory are as follows:

New South Wales

Sydney, Blue Mountains, Capital Country, Central Coast, Central Coast, Central NSW, Hunter, New England North West, North Coast NSW, Outback NSW, Riverina, Snowy Mountains, South Coast and The Murray.

Victoria

Melbourne, Ballarat, Bendigo Loddon, Central Highlands, Central Murray, Geelong and the Bellarine, Gippsland, Goulburn, Great Ocean Road, High Country, Lakes, Macedon, Mallee, Melbourne East, Murray East, Peninsula, Phillip Island, Spa Country, Upper Yarra, Western Grampians and Wimmera.

Queensland

Brisbane, Bundaberg, Southern Queensland Country, Fraser Coast, Gold Coast, Mackay, Townsville, Outback Queensland, Sunshine Coast, Tropical North Queensland, Whitsundays, Capricorn, Gladstone

South Australia

Adelaide, Adelaide Hills, Barossa, Clare Valley, Eyre Peninsula, Fleurieu Peninsula, Limestone Coast, Murray River, Lakes and Coorong, Riverland, Yorke Peninsula, Flinders Ranges and Outback and Kangaroo Island.

Western Australia

Destination Perth, Australia's Golden Outback, Australia's North West, Australia's South West and Australia's Coral Coast.

Tasmania

Hobart and the South, East Coast, Launceston and the North, North West and West Coast.

Northern Territory

Darwin, Barkly, Alice Springs, Litchfield Kakadu Arnhem, Katherine Daly, Lasseter and MacDonnell.

ACT

Canberra.



Australian Government

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australiacouncil.gov.au