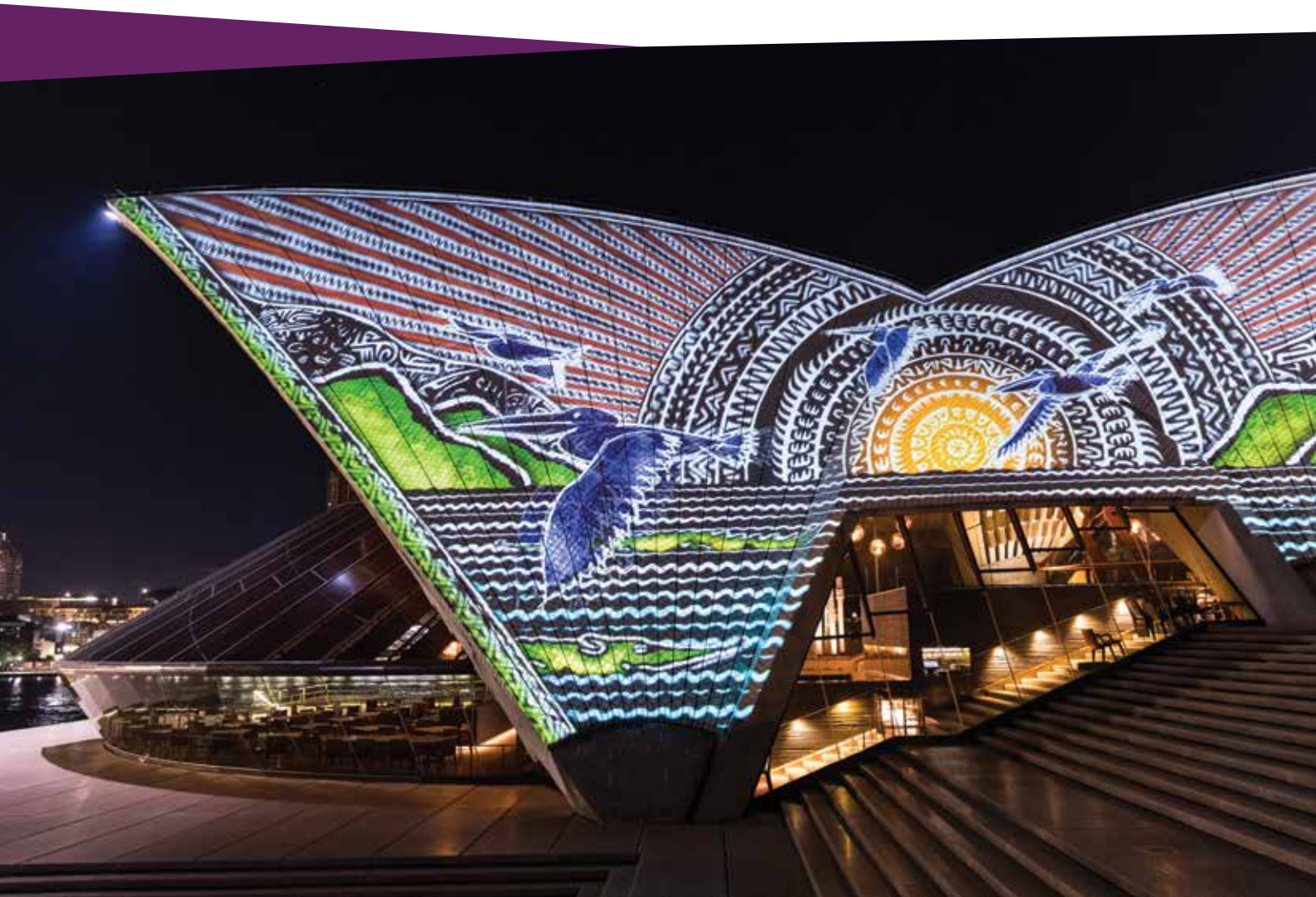


# INTERNATIONAL ARTS TOURISM

## CONNECTING CULTURES



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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*International Arts Tourism: Connecting cultures*,  
Australia Council for the Arts.

## ACKNOWLEDGEMENTS

The Australia Council would like to thank the following for their assistance in compiling this report: the Adelaide Festival, Arts ACT, Arts NT, Arts Queensland, Arts South Australia, Arts Tasmania, Create NSW, Creative Victoria, Destination NSW, FORM and the PUBLIC Silo Trail, the Museum of Old and New Art (MONA), the National Gallery of Victoria (NGV), Screen Australia, the Sydney Opera House, Terrapin Puppet Theatre, Tourism Research Australia (TRA), and the Western Australia Department of Culture and the Arts.

# FOREWORD

*Art is an international language that transcends borders. In sharing Australian stories with the world, the arts are a highly influential and powerful tool for building national identity and cultural exchange.*

Australian artists and their work also demonstrate our creativity and innovation, positioning us as a progressive nation that values ideas and invention.

The Australia Council is committed to growing the profile of Australian arts and captivating global audiences with diverse Australian work that reflects our rich cultural fabric. Arts provide an important point of connection: in Australia we have shared stories and histories across the globe. We know that audiences are drawn to Australia's unique First Nations arts and cultures, and connect through the extraordinary diaspora who have made Australia their home.

A key channel for reaching global audiences and shaping our international perception is through engaging international tourists with arts experiences while they are in Australia. International visitors shape their understanding of Australian identity and our quality of life through arts and cultural experiences.

In this report, we present trends and insights into arts engagement by international tourists. This research adds to the evidence base around the role of the arts in supporting economic activity through tourism, and in contributing to cultural exchange, soft power and our international reputation. It also equips artists and arts organisations with valuable market intelligence about the behaviours and interests of international tourists.

The research highlights the growing potential for the arts to drive and support tourism activity, and

for our artists to increase their engagement with the international tourist market.

The growing value of cultural tourism is acknowledged globally. In a recent survey of Member States of the United Nations World Tourism Organisation (UNWTO), 90% of respondents accorded a specific place for cultural tourism in their tourism policy, 69% indicated that cultural tourism is 'very important to tourism policy', and 84% indicated cultural tourism had a specific place in their tourism marketing and promotional plans. The report concluded that cultural tourism is set to remain one of the key tourism markets in the future.<sup>^</sup>

Arts and culture contribute to Australia's broader interests as potent soft power assets. The arts powerfully contribute to international cooperation and security in a world that is more connected and yet more divided than ever. It is of particular importance that Asia is our largest market for arts tourism, making it a major soft power asset to support our most significant trade partnerships.

The arts will shape the future of our global story. This research contributes to the Australia Council's body of work that highlights the ways in which our confident, outward-looking and future focused arts sector strengthen Australia's international reputation as a sophisticated and creative nation.

**Dr Wendy Were,**  
Executive Director Strategic Development  
and Advocacy

<sup>^</sup> United Nations World Tourism Organisation (UNWTO) 2018, Tourism and Culture Synergies <https://www.e-unwto.org/doi/book/10.18111/9789284418978>



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Brenton See for PUBLIC Silo Trail, Newdegate, 2018.  
Photograph by Bewley Shaylor, courtesy of FORM

# INTRODUCTION

*Arts experiences play an important and growing role in international tourism to Australia. They engage international visitors with the uniqueness, depth and diversity of Australian culture, support local economies and share Australian stories and perspectives with the world.*

This research brings together data from Tourism Research Australia (TRA) with additional resources to gain insights into international arts tourism in Australia.

It highlights the potential for the arts to drive and support tourism, and for the arts sector to increase engagement with international visitors. It contributes to evidence about the critical role of the arts for the wellbeing and success of our nation.

In this research, an international arts tourist is defined as an international visitor who did at least one of the following activities while in Australia:

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



Brenton See for PUBLIC Silo Trail, Newdegate, 2018. Photograph by Bewley Shaylor, courtesy of FORM

## SUMMARY

- International arts tourism to Australia is growing. Over the last five years, international arts tourism has grown at a higher rate than overall international tourism.
- Asia is our largest arts tourist market. In 2010, visitors from Asia replaced those from Europe as the largest proportion of international arts tourists. By 2017 almost half of all international arts tourists were visitors from Asia.
- Visiting museums and galleries is the most popular form of international arts tourism. Museums and galleries are a readily accessible form of arts engagement for tourists. Three in every ten international visitors to Australia in 2017 visited a museum or gallery while they were here.
- Over one million international tourists attended festivals, fairs and cultural events in 2017, an increase of 61% since 2013. A number of factors may have contributed to the increase in attendance such as the growth in the number of festivals on offer and the increasing number of events providing for a wide range of interests.
- First Nations arts engage international tourists, especially those who travel outside capital cities. Engagement with First Nations arts was higher for arts tourists who travelled beyond metropolitan areas. More than a third of these travellers attended a First Nations arts activity in 2017.
- There is strong and growing potential for the arts to help drive regional tourism. International arts tourists are more likely to visit regional Australia than international tourists overall.
- Arts tourists are travelling beyond east coast states. While the Northern Territory, South Australia, Tasmania and the ACT attracted smaller numbers of total international tourists overall in 2017, a higher proportion were arts tourists compared to those who visit NSW, Victoria and Queensland.

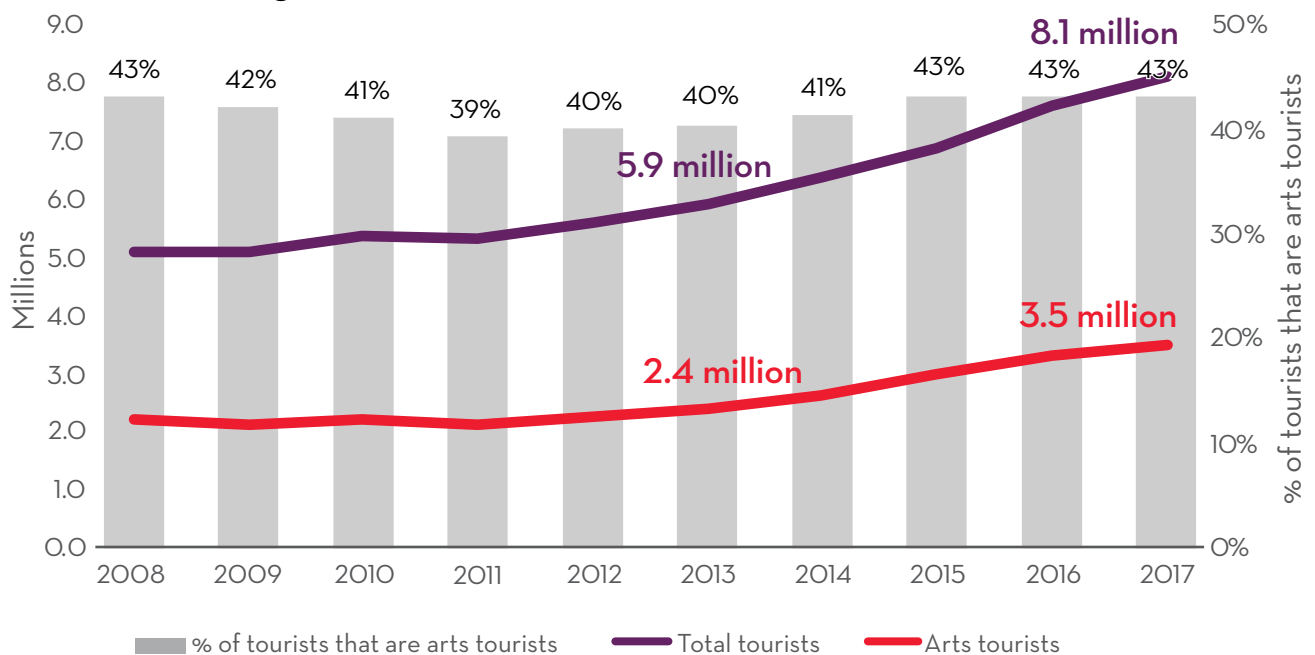
Over the last five years, international arts tourism has grown at a higher rate than overall international tourism.

# INTERNATIONAL ARTS TOURISM TO AUSTRALIA IS GROWING

*The arts are increasingly part of the itinerary for international visitors to Australia.*

- More than eight million international tourists visited Australia in 2017 and three and a half million (43%) engaged with the arts while here.
- Arts tourist numbers grew by 47% between 2013 and 2017, a higher growth rate than for international tourist numbers overall (37%).
- More international tourists engage with the arts than visit wineries or casinos, or attend organised sports events.

**International tourist growth trends 2008–2017**



- The proportion of international tourists engaging with the arts while in Australia has ranged between 39% and 43% over the last decade. It has been on an upward trend since 2011.
- Forecasts predict that international tourists to Australia will grow to close to ten million in 2018–19, and as total aviation capacity to Australia continues to grow we can expect numbers of international arts tourists to continue to grow.<sup>1</sup>

<sup>1</sup> Tourism Australia 2018, International Aviation Statistics, viewed 4 October 2018. <http://www.tourism.australia.com/en/markets-and-research/aviation.html>  
 Tourism Research Australia 2017, *Forecasts of International Traveller Activity 2017*, available at <https://www.tra.gov.au/International/international-tourism-forecasts>



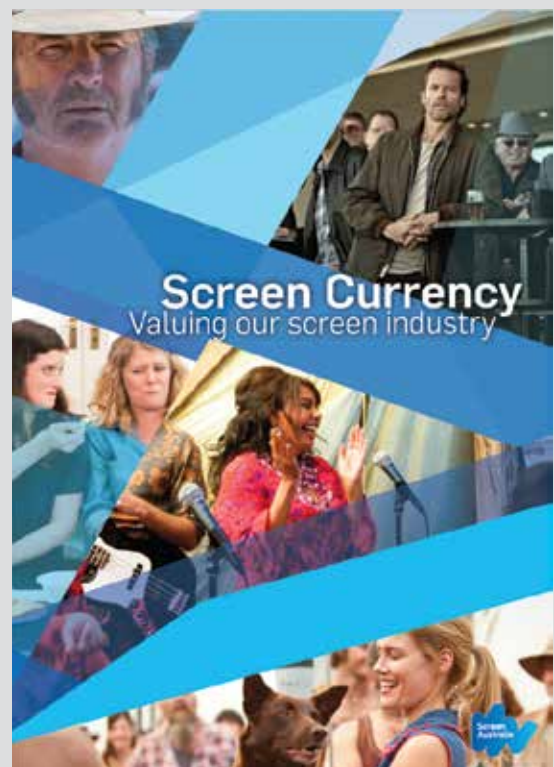
## AUSTRALIA ON THE SCREEN IS ATTRACTING INTERNATIONAL TOURISTS

As well as providing experiences for international visitors, the arts attract international tourists through film and TV programs that showcase Australia's country, culture and history to the world.

Australian screen content is powerful in driving tourism by strengthening Australia's brand and providing compelling portraits of the country as a destination.

Screen Australia research in 2016 shows that around 230,000 international tourists are estimated to visit or extend their stay in Australia each year as a result of viewing Australian film and TV content. This represents an estimated \$725 million in additional tourism expenditure in Australia each year.

Screen content can draw international tourists to a specific filming location and can more generally drive visitation to the country.<sup>2</sup>



Screen Currency research. Credit: Screen Australia

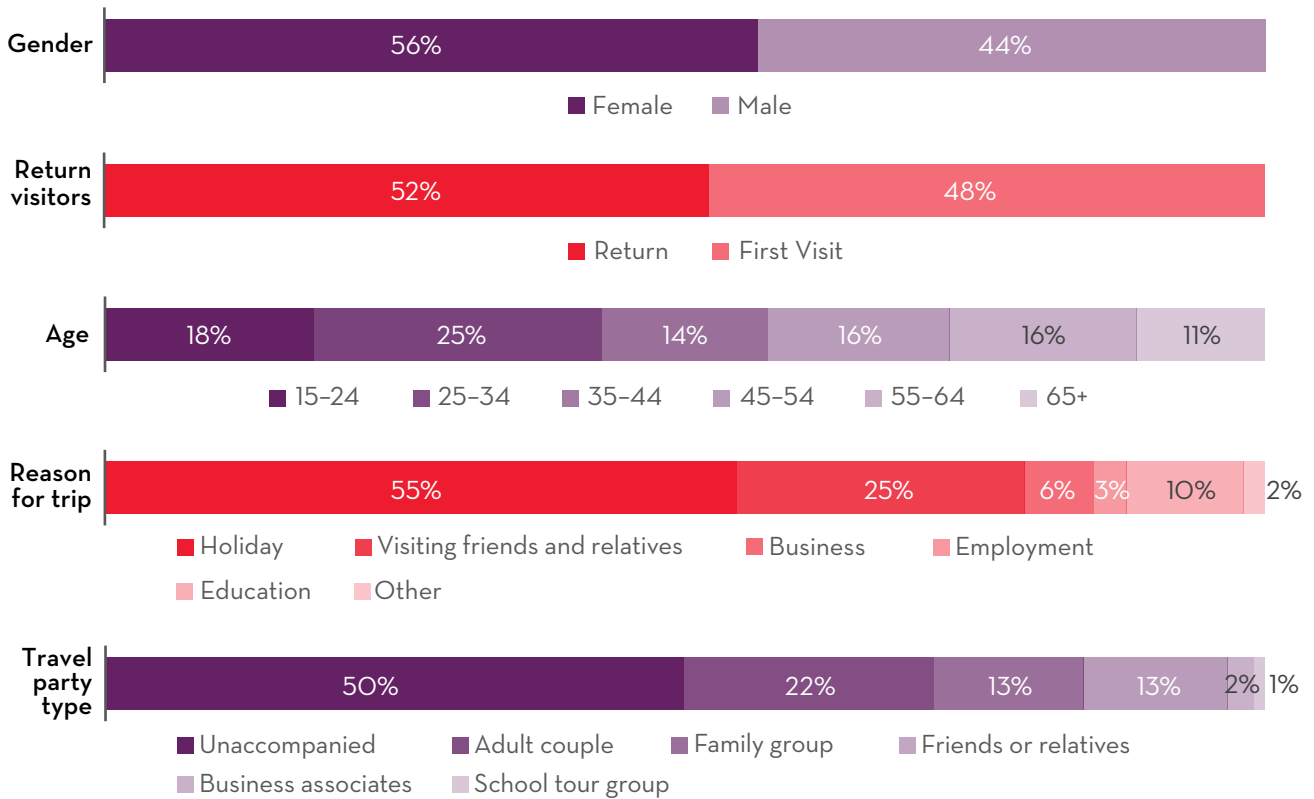
## INTERNATIONAL ARTS TOURIST PROFILE

In 2017:

- there were more female arts tourists (56%) than male (44%)
- more than half of all international arts tourists were return visitors to Australia (52%).
- while international visitors came to Australia for a number of reasons including business and study, the majority of arts tourists were on holiday (55%)
- one in four arts tourists were aged between 25 and 34 (25%)
- arts tourists were predominantly solo travellers (50%).

<sup>2</sup> Screen Australia 2016, *Screen Currency: Valuing our screen industry*, available at <https://www.screenaustralia.gov.au/fact-finders/reports-and-key-issues/reports-and-discussion-papers/screen-currency>

### International arts tourist profile 2017



This profile is similar to the profile of international tourists overall.

While there are large numbers of young, unaccompanied holiday-makers engaging with the arts in Australia, rates of arts engagement were higher *within* some of the smaller cohorts of international arts tourists:

- 60% of those who visited for education reasons engaged with the arts, compared to 49% of holiday makers.
- 64% of those travelling in a school tour group engaged with the arts, compared to 42% of those travelling solo.

### ARTS TOURISTS' SPEND IN AUSTRALIA

There is great and growing potential for the arts to support economic activity and local economies by driving and supporting international tourism.

- International arts tourists spent \$17 billion in 2017, making up 60% of the \$28.4 billion spent in Australia by all international tourists.
- International arts tourist spend in Australia increased by 55% since 2013, a greater increase than the total international visitor spend in Australia (46%).

### THE SYDNEY OPERA HOUSE DRIVES INTERNATIONAL TOURIST SPEND

A globally recognised cultural icon, the Sydney Opera House is one of the most recognisable symbols of Australia and Australian art and culture. In 2016–17 a Brand Asset Valuator (BAV) report identified the Opera House as Australia’s most ‘unique’ and ‘distinctive’ national brand, assessing it as a NSW ‘mega-brand’.

Through its brand power and global reach, the Opera House promotes Australia as a modern, creative society with world-class institutions. Also Australia’s premier tourist attraction, the Opera House precinct contributes an estimated \$640 million per annum to tourism expenditure from visitors to Sydney according to Deloitte Access Economics.<sup>3</sup>

### LENGTH OF STAY AND SPEND

The longer a visitor stays in Australia, the greater the amount they spend in total.

- Arts tourists tend to stay longer and spend more in total while in Australia than the average tourist, but spend slightly less on average per night during their stay.
- Overall, in 2017, arts tourists stayed in Australia for an average of 47 nights and spent \$103 per night during their stay.
- Total international visitors stayed an average of 33 nights, spending around \$107 per night during their stay.

### REASON FOR VISIT AND SPEND

Nights stayed and spend per night varies depending on the tourist’s main reason for visiting Australia. International visitors come to Australia for a number of reasons, including holidays, business and study. Holidays in Australia incorporate shorter visits, as well as longer trips such as backpacking.

In 2017:

- Arts tourists who were holiday-makers stayed an average of 29 nights in Australia and spent an average of \$107 per night during their stay. More than half of arts tourists were holiday-makers (55%), however they contributed around a third (35%) of the total spend in Australia by arts tourists.
- One in four arts tourists were in Australia to visit friends or relatives. They stayed an average 33 nights and spent around \$60 per night during their stay – the lowest average spend. This is to be expected given they are less likely to pay for accommodation.
- 3% of arts tourists were here primarily for employment. They stayed an average of 153 nights in Australia and spent around \$72 per night during their stay. All, or part of their overnight accommodation costs may be covered by their employer.
- 6% of arts tourists were here for business, staying an average of 20 nights in Australia and spending an average of \$167 per night during their stay.
- One in ten arts tourists were primarily in Australia to study or for education reasons. They stayed an average of 152 nights in Australia, spending an average of \$135 per night during their stay. Those visiting for education reasons were the largest contributor to spend in Australia by arts tourists, making up 40% or \$7 billion in 2017. However, this also includes spending on such items as course fees and other study-related costs.

<sup>3</sup> Deloitte 2013, How do you value an icon? *The Sydney Opera House: economic, cultural and digital value*, available at <https://www2.deloitte.com/au/en/pages/sydney-opera-house/articles/value-an-icon-sydney-opera-house.html>

## INTERNATIONAL ARTS TOURISTS AND EDUCATION

There is potential for the arts sector to further leverage its engagement of international students, and to support the education sector in attracting international students to study in Australia.

Learning about the arts and culture of a destination plays a role not only in formal schooling but broadens perspectives and contributes to personal development. Visitors here for education reasons were the group most likely to attend the arts while in Australia, along with those who visited as part of a school tour group.

Visitors to Australia for education reasons are also the fastest growing group of visitors, increasing 49% since 2013. Numbers of international students in Australian universities, colleges, courses and schools continues to grow year on year with over half a million enrolments in 2018.<sup>4</sup>

As well as large numbers and growth in students from Asian countries, there has

been an increase in students from South American countries such as Brazil and Colombia, reflecting the increasing diversity of international student backgrounds.<sup>5</sup>

Arts tourists from South America were three times more likely to be visiting Australia for education reasons than arts tourists from other parts of the world, and South Americans as a group are most likely of all to engage with the arts while in Australia.



Australia Council's International Leadership Program participants 2017

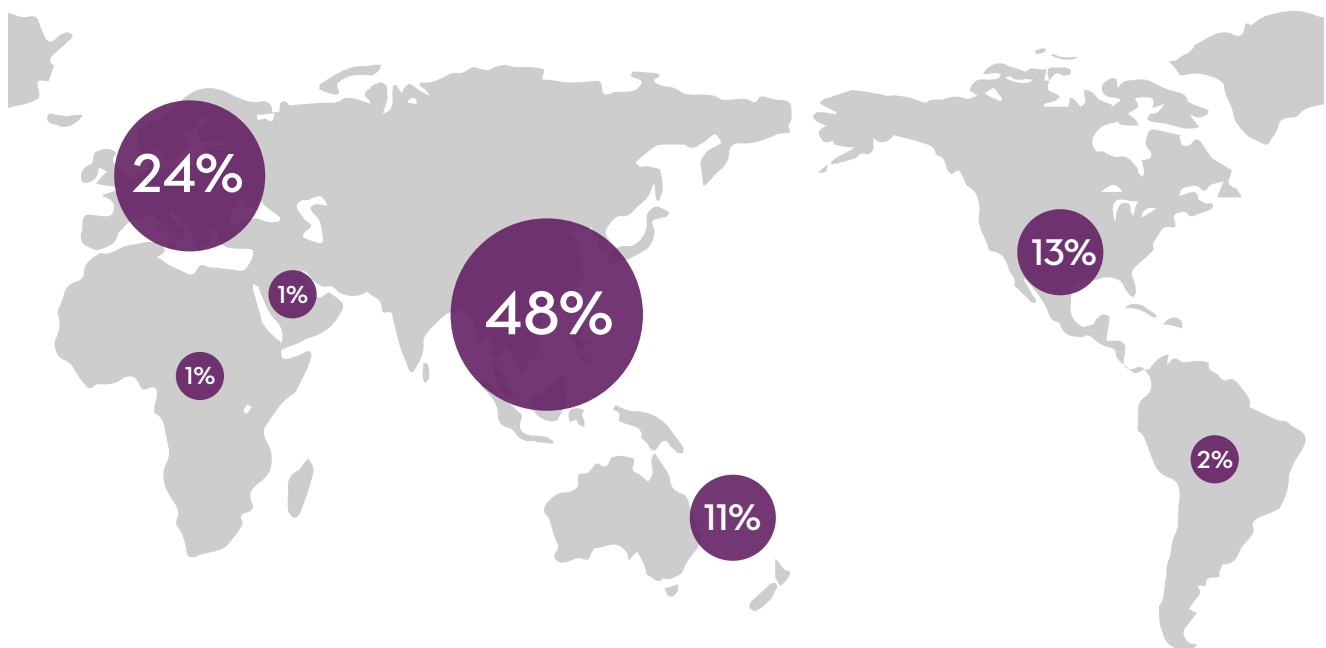
4 Robinson, N 2018, *Australia hosting unprecedented numbers of international students*, ABC, April 18 2018. <http://www.abc.net.au/news/2018-04-18/australia-hosting-unprecedented-numbers-international-students/9669030>

5 Godfrey, A 2018, *Latin America sees surge in international education*, Austrade Economic Analysis, 29 March 2018. <https://www.austrade.gov.au/News/Economic-analysis/latin-america-sees-surge-in-international-education>

Robinson, N 2018, *Australia hosting unprecedented numbers of international students*, ABC, April 18 2018. <http://www.abc.net.au/news/2018-04-18/australia-hosting-unprecedented-numbers-international-students/9669030>

# ASIA IS OUR LARGEST ARTS TOURIST MARKET

Proportion of international arts tourists by region (2017)



## INTERNATIONAL ARTS TOURISTS BY COUNTRY AND REGION

- Almost 620,000 arts tourists came to Australia from China in 2017 – as a country it's our biggest market.
- The five countries making up the largest numbers of international arts tourists in 2017 were China, the UK, the USA, New Zealand and Japan.
- Total numbers of arts tourists from Asia, the Middle East, Oceania, Europe, North America and South America have grown year on year since 2008.



Byron Writers Festival 2016. Credit Evan Malcolm

## ARTS TOURISTS FROM ASIA

- In 2010, visitors from Asia replaced those from Europe as the largest proportion of international arts tourists.
- By 2017, almost half (48%) of international arts tourists were visitors from Asia, up from 32% in 2008. The proportion of all international tourists from Asia (not just arts tourists) has also grown, from 37% in 2008 to almost half the market in 2017. Increasing numbers of inbound flight services from key Asian markets to Australia has coincided with this increase.<sup>6</sup>
- The reverse is also true: Australians are increasingly travelling to Asia, with seven of the top ten travel destinations for Australians in 2017–18 in the Asian region.<sup>7</sup>
- Within the 48% of arts tourists from Asia, 30% were from the North Asia region and 13% were from South East Asia.<sup>8</sup> Despite only 5% of all arts tourists coming from South Asia, total tourist numbers from this region have nearly doubled over the last five years.<sup>9</sup>
- In 2017, the majority of arts tourists from Asia were visiting on holiday, and these holiday-makers from Asia made up 28% of *total* arts tourists.
- Given the high volume of tourists from this region, arts tourists from Asia were the largest group engaging across the majority of arts activities.
- Visiting museums and galleries was the most popular arts activity overall. 72% of arts tourists from Asia visited a museum or gallery, a similar proportion to total arts tourists (71%).
- The biggest growth area since 2013 for arts tourists from Asia was attendance at festivals, fairs and cultural events, which increased by 115%, compared to 61% growth for arts tourists from any country.

6 Tourism Australia 2017, *Tourism Australia International Market Update China 2017*, available at <http://www.tourism.australia.com/en/markets-and-research/market-regions/greater-china/china.html>

7 ABS 2018, *Asian destinations increase in popularity for Aussies*, media release, 15 May 2018. <http://www.abs.gov.au/ausstats/abs@.nsf/0/2E33320E030F1DEACA25696E007FDE66?OpenDocument>

Gebicki, M 2017, *Most popular countries for Australians to visit: 2017 ABS tourism figures*, Traveller, 22 February 2018. <http://www.traveller.com.au/most-popular-countries-for-australians-to-visit-2017-abs-tourism-figures-howfig>

8 North Asia includes China, Japan, Korea, Taiwan, Hong Kong, Macau and Mongolia.

South East Asia includes Singapore, Malaysia, Indonesia, Thailand, Myanmar, Cambodia, Laos, Vietnam, Brunei Darussalam, The Philippines and Timor-Leste.

9 South Asia includes India, Bangladesh, Bhutan, Maldives, Nepal, Pakistan, Sri Lanka and Afghanistan.

## ARTS AND TOURISM PROMOTE ENGAGEMENT WITH COUNTRIES ACROSS ASIA

Asian markets have been identified as a tourism focus by both arts organisations and tourism bodies in Australia.

North Asia, South East Asia, and South Asia have been identified as regional priorities of the Australia Council's International Arts Strategy, given their high-growth economies and strong interest in Australian arts and culture.

High growth in the number of opera tickets sold to Chinese tourists when visiting Australia has seen Opera Australia include surtitles in simplified Chinese, coinciding with the company's first tour to China in 2018.<sup>10</sup> Also in 2018, for the first time, rare First Nations artworks from Arnhem Land are touring China and Taiwan, reflecting this strong and growing interest.<sup>11</sup>

In 2017, the NSW Premier launched the dates for the Vivid Sydney Festival to the Japanese tourism industry in Tokyo, boosting Japanese tourism around the event.<sup>12</sup> Japanese tourist



Fuju light installation Vivid Sydney 2018. Credit: Destination NSW

attendance at Australian festivals, fairs and cultural events festivals has increased by 83% over the last five years.

Since 1993, Queensland Art Gallery/ Gallery of Modern Art (QAGOMA)'s Asia Pacific Triennial has both strengthened the connection between Asian and Pacific art and has been a driver of arts tourism with more than 600,000 visitors in 2015–16.<sup>13</sup>

The three-yearly event promotes arts and culture of the Asia-Pacific region as well as sharing cultural knowledge and supporting development of cross-cultural contemporary art expertise and partnerships across the region.<sup>14</sup>

## SOUTH AMERICAN ARTS TOURISTS ARE A MARKET TO WATCH

Tourists from South America make up a small volume of total arts tourists (2% in 2017), but are highly engaged with the arts.

- Over half (56%) of all tourists from South America attended at least one arts activity while in Australia in 2017, the most engaged group of all regions.
- Numbers of South American arts tourists have doubled since 2013, surpassing the growth of arts tourists overall.
- South American arts tourists are also more likely to be visiting Australia for education than those from other areas of the world and more than three times more likely than arts tourists overall. See *International arts tourists and education* breakout box. (Page 11)

<sup>10</sup> Opera Australia 2018, *Opera Australia to debut Chinese surtitles at the iconic Sydney Opera House*, 22 February 2018. <http://www.ampag.com.au/article/opera-australia-to-debut-chinese-surtitles-at-the-iconic-sydney-opera-house>

Opera Australia 2018, *Madama Butterfly on tour*, viewed 26 October 2018. <https://opera.org.au/on-tour/china>

<sup>11</sup> National Museum Australia 2018, *Most significant collection of Aboriginal barks to go to China*, media release, 14 June 2018. <http://www.nma.gov.au/about/media/2018/aboriginal-bark-paintings-china>

<sup>12</sup> Needham, K 2017, *Sydney's Vivid festival attracts a record 2.33m visitors*, Sydney Morning Herald, 22 August 2017. <https://www.smh.com.au/national/nsw/sydneys-vivid-festival-attracts-a-record-233m-visitors-20170821-gy10s5.html>

<sup>13</sup> QAGOMA 2016, *APT8 hits half a million visitors*, QAGOMA Blog, 21 March 2016. <https://blog.qagoma.qld.gov.au/apt8-hits-half-a-million-visitors/>

<sup>14</sup> QAGOMA 2018, *The Asia Pacific Triennial of Contemporary Art*, viewed 4 October 2018. <https://www.qagoma.qld.gov.au/about/our-story/apt>

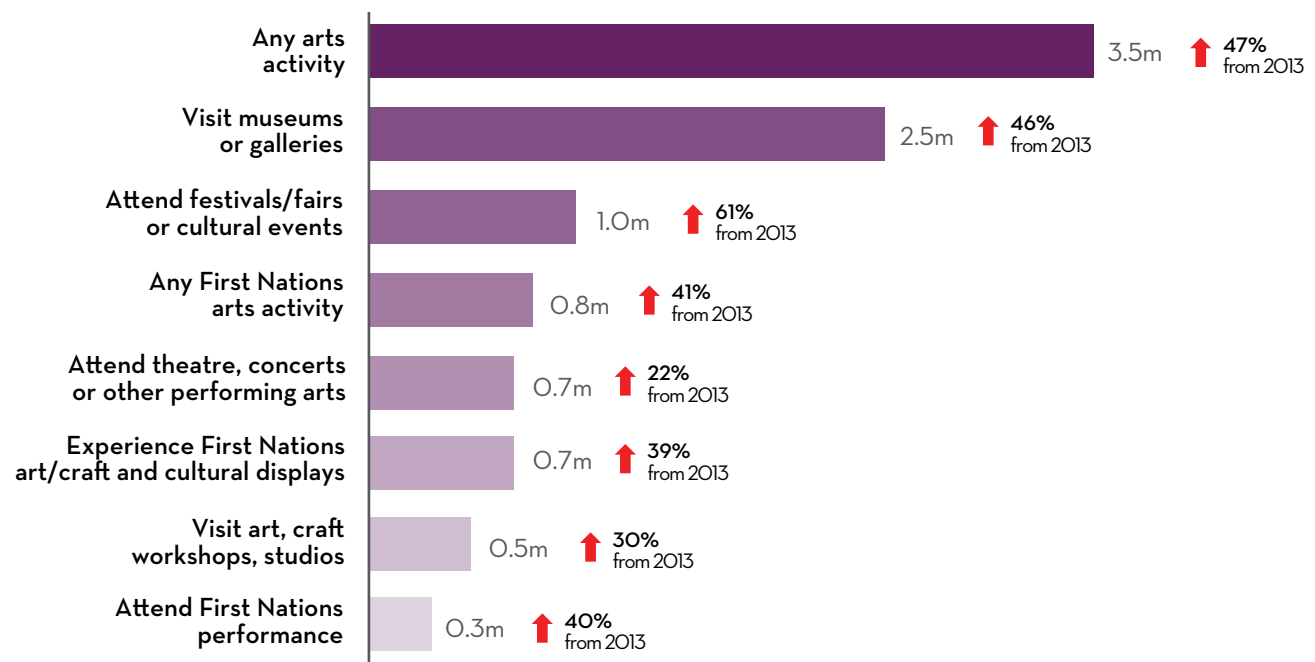
# VISITING MUSEUMS AND GALLERIES IS THE MOST POPULAR FORM OF INTERNATIONAL ARTS TOURISM

*With several hundred public and commercial spaces throughout Australia,<sup>15</sup> museums and galleries are a readily accessible form of arts engagement for tourists, often not requiring forward planning or advance ticket purchase.*

Museums and galleries are also top of mind and easily recommendable ways to engage with arts and culture in Australia.

- More than two and a half million international tourists visited museums and galleries while they were in Australia in 2017, an increase of 46% since 2013.
- With three in ten international tourists (31%) and seven in ten international arts tourists (71%) visiting museums and galleries in 2017, it continues to be the most popular arts activity, irrespective of the visitor’s main reason for visiting Australia.
- However tourists visiting for educational purposes were particularly engaged, with 43% attending, compared to 36% of holiday-makers.

## Arts activities undertaken by international tourists in 2017



<sup>15</sup> Art Almanac 2018, What's on, viewed 29 October 2018. <https://www.art-almanac.com.au/whats-on/>  
Number of regional venues counted in each state.



### AUSTRALIA'S OLDEST GALLERY IS AMONG THE MOST VISITED WORLDWIDE

In March 2017, Britain's *The Art Newspaper* listed the National Gallery of Victoria (NGV) in the top 20 most visited art museums in the world in its survey of global art museum attendance.<sup>16</sup>

The NGV's 2017 exhibition *Van Gogh and the Seasons*, presented in partnership with Art Exhibitions Australia, was the tenth most popular exhibition of the year worldwide.<sup>17</sup>



Visitors enjoying *Van Gogh and The Seasons*, 2017 which was on display at NGV International during 2017. Photo courtesy the NGV

Museums and galleries commonly offer services, tours and audio guides in languages other than English, which may be increasing their accessibility for international tourists.

For example, the Art Gallery of NSW offers regular tours in Japanese, Mandarin, Cantonese and Korean, as well as offering select tours in Hindi and Arabic for the Archibald, Wynne and Sulman prizes in 2017.

Some gallery websites – such as that of the National Gallery of Victoria – are available in a range of languages. Some larger galleries and museums are also replacing audio guides with apps which may increase accessibility and broaden appeal for some audiences.

The NGV's 2017 exhibition *Van Gogh and the Seasons*, presented in partnership with Art Exhibitions Australia, was the tenth most popular exhibition of the year worldwide.

<sup>16</sup> Sharp, E and Da Silva, J 2018, *The world's most popular exhibition? Ancient sculptures in Tokyo versus Modern masters in Paris*, *The Art Newspaper* London, 26 March 2018. <https://www.theartnewspaper.com/analysis/ancient-buddhist-sculptures-triumph-over-modern-masters>

<sup>17</sup> *ibid*

## VISITORS ARE ENGAGING THROUGH SOCIAL MEDIA

In addition to its high visitation numbers, the National Gallery of Victoria was also the tenth most tagged location in Australia on Instagram in 2017.<sup>18</sup>

Many museums and galleries throughout Australia offer immersive, inclusive and shareable experiences. Recent research from the US suggests that intention to travel to a destination is influenced by social media generated from other visitors to that place.<sup>19</sup>

Travellers influenced by social media also tend to be fully independent (not part of a tour group or package), and rely heavily on the internet for information.<sup>20</sup>

The most Instagram geotagged location in Tasmania, the Museum of Old and New Art (MONA)<sup>21</sup> has been recognised as a driver of arts tourism in Tasmania since its opening in 2011.<sup>22</sup>

Tourism Tasmania's Tasmanian Visitor Survey reported that MONA was the second most popular tourist attraction in the state, behind Salamanca Market, receiving 1.28 million domestic and international visitors for the year ending September 2017.<sup>23</sup>

International visitor numbers for Hobart over the last five years (2013 to 2017) also point to increasing arts tourism:

- The number of international arts tourists visiting Hobart increased by 92%, compared to the national average increase of 47%.
- The number of total international tourists visiting Hobart increased by 88%, while the number who visited Hobart and attended museums or galleries while they were in Australia increased by 103%.



The Museum of Old and New Art (MONA). Image courtesy of the Museum of Old and New Art

18 Whiting, A 2017, Business Insider 2017, *The 10 most popular destinations in Australia on Instagram*, 2 December 2017. <https://www.businessinsider.com.au/the-10-most-popular-destinations-in-australia-on-instagram-2017-12>

19 Boley, B B, Jordan, E J, Kline, C, Knollenberg, W 2018, *Social return and intent to travel*, *Tourism Management*, vol 64, pp.119-128, available at <https://www.sciencedirect.com/science/article/pii/S026151771730184X>

Andrew, A 2018, *Here's How Much Instagram Likes Influence Millennials' Choice Of Travel Destinations*, *Forbes*, 24 January 2018. <https://www.forbes.com/sites/andrewarnold/2018/01/24/heres-how-much-instagram-likes-influence-millennials-choice-of-travel-destinations/#58e82fb94eba>

20 Tourism Australia and Australian Tourism Export Council 2016, *The Tourism Export Toolkit*, April 2016, available at [www.tourism.australia.com/content/dam/assets/document/1/6/w/u/x/2002137.pdf](http://www.tourism.australia.com/content/dam/assets/document/1/6/w/u/x/2002137.pdf)

21 Whiting, A 2017, Business Insider 2017, *The 10 most popular destinations in Australia on Instagram*, 2 December 2017. <https://www.businessinsider.com.au/the-10-most-popular-destinations-in-australia-on-instagram-2017-12>

22 Salmon, G 2016, *Capital gains: How MONA got Hobart humming*, *ABC*, October 4 2016. <http://www.abc.net.au/news/2016-01-13/mona-got-hobart-humming/7081376>

23 Tourism Tasmania 2017, *Mona - Visitor profile for year ending Sep 2017*, available at [https://www.tourismtasmania.com.au/research/reports/mona\\_statistics](https://www.tourismtasmania.com.au/research/reports/mona_statistics)

# MORE THAN ONE MILLION INTERNATIONAL TOURISTS ATTENDED FESTIVALS, FAIRS AND CULTURAL EVENTS IN 2017, AN INCREASE OF 61% SINCE 2013

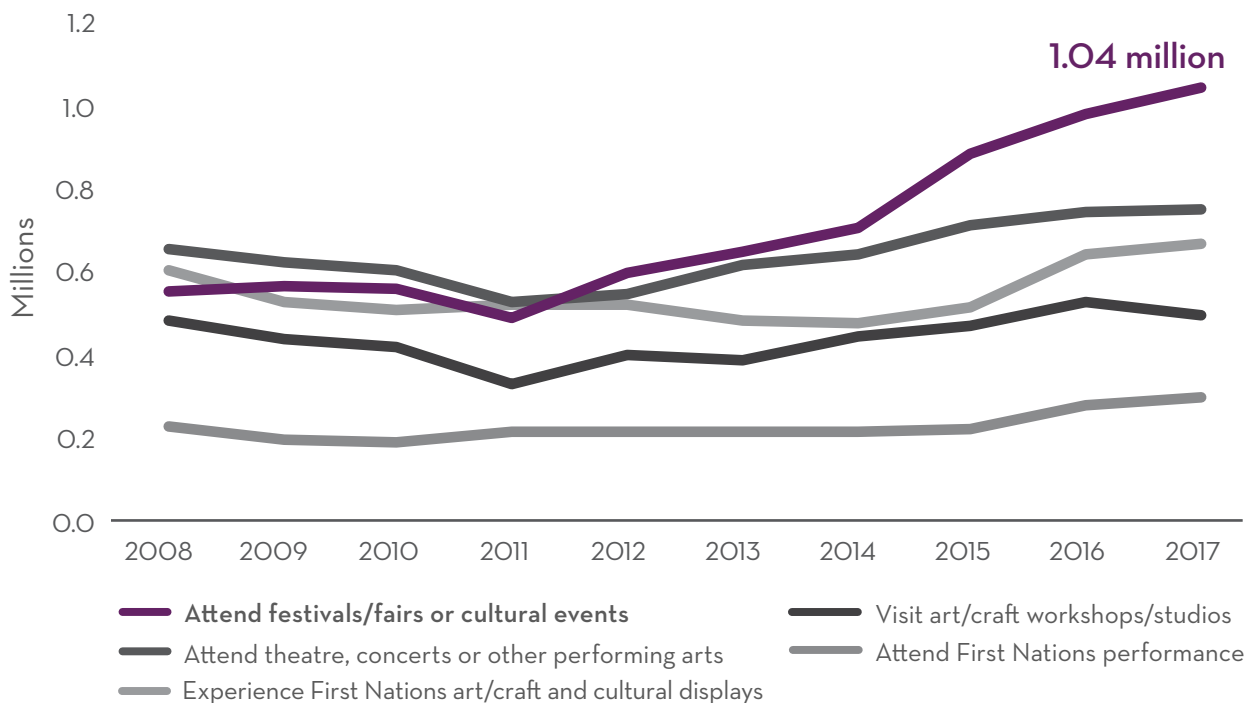
*Festivals, fairs and cultural events cover a range of themes and event styles, including those oriented around art, craft, literature, music and other performing arts.*

These events can comprise of smaller daytime fairs and fetes to multi-day and major international multi-arts festivals. In their diverse forms they bring people together in immersive arts and cultural experiences.

- Attendance at festivals, fairs and cultural events is the fastest growing arts activity among international tourists, increasing by 61% from 643,000 attendees in 2013 to over one million in 2017.
- Over the past five years, attendance at festivals, fairs and cultural events increased for arts tourists regardless of whether they visited metropolitan or regional areas of Australia.
- Arts tourists who visited regional areas and attended festivals while in Australia increased by 39% and those who visited metropolitan areas and attended festivals while in Australia increased by 62% (this may be influenced by more tourists arriving into Australia through capital cities).
- The largest group of international tourists attending festivals, fairs and cultural events in 2017 were solo travellers (62%), followed by adult couples (16%). Engagement was highest within the large solo traveller cohort, and among school tour groups.
- Festivals skew towards younger audiences more so than any other arts activity. However they still have broad appeal, with around one in five international arts tourists aged 45 years and over attending a festival, fair or cultural event in 2017.

*In their diverse forms festivals bring people together in immersive arts and cultural experiences.*

### Trends in international tourist numbers for selected arts activities shows strong growth in festivals, fairs and cultural events (2008-2017)



#### NUMBERS AND TYPES OF FESTIVALS ARE INCREASING

A range of factors may have contributed to the increase in attendance at festivals, fairs and cultural events, such as the growth in the number of festivals on offer.

A major study by Creative Victoria found that over half of creative festivals in Victoria had begun in the last ten years.<sup>24</sup> It also found that 35% of attendees travel to festivals (from overseas or other parts of Australia) and those who attend festivals travel beyond metropolitan areas.<sup>25</sup>

There are growing numbers of events catering to a wide range of interests and tastes. For example, Bendigo International Festival of Exploratory Music saw its audience grow by 400% within a few years of its launch in 2013.<sup>26</sup>

Similarly, UNIFY Gathering, a heavy music festival in regional Victoria began in 2015 with 3,000 attendees and currently has plans to expand capacity to 15,000 in 2020.<sup>27</sup>

A 2016 Eventbrite study of music festival goers across Australia, the US, UK and Canada found that almost half planned to attend even more festivals the following year.<sup>28</sup>

24 Creative Victoria 2018, *Victoria's Creative Industry Festivals Review*, Melbourne, available at <https://creative.vic.gov.au/research/reports/victorias-creative-industry-festivals-review> Creative Victoria's Creative Industry festivals research defined creative festivals as having greater than 20% of programmed content being creative.

25 Creative Victoria 2018, *Victoria's Creative Industry Festivals Review*, Melbourne, available at <https://creative.vic.gov.au/research/reports/victorias-creative-industry-festivals-review>

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

27 Williams, T 2018, *UNIFY Gathering Reportedly Planning To Expand Crowd Capacity By Thousands In 2019 & 2020*, Music Feeds, May 28 2018. <http://musicfeeds.com.au/news/unify-gathering-reportedly-planning-expand-crowd-capacity-thousands-2019-2020/>

28 Eventbrite 2016, *Australian Festival Fans Revealed*, viewed 4 October 2018. <https://www.eventbrite.com.au/1/state-of-australian-music-festivals-2016/>

## AUDIENCES FOR AUSTRALIAN MULTI-ARTS FESTIVALS HAVE BEEN GROWING

*Connecting Australians: Results of the National Arts Participation Survey 2017* shows that one in five Australians attends multi-art form festivals.<sup>29</sup>

Many Australian festivals have reported increased attendance in recent years:

- In just seven years, Fringe World (the Perth Fringe Festival) is now the third largest fringe festival in the world following Edinburgh and Adelaide.<sup>30</sup> There are over 250 fringe festivals worldwide.<sup>31</sup>
- Melbourne Fringe has continued to report year on year growth in attendees.<sup>32</sup>
- The 2017 Darwin Festival increased ticket sales by 75% on 2016 sales.<sup>33</sup>

Festivals provide exposure for artists and opportunities for audiences to experience a wider variety of arts than they ordinarily might.

## MAJOR FESTIVALS ARE COLLABORATING TO SUPPORT THE CREATION OF NEW AUSTRALIAN WORKS

*You and Me and the Space Between* by Terrapin Puppet Theatre was co-commissioned by Ten Days on the Island Festival together with Brisbane, Darwin and Melbourne Festivals. The production has since been invited to tour to Edinburgh, Shanghai, and Beijing as well as across Japan and the United States.

The production's success can be attributed to a number of factors including its adaptability and the international reputation of Australian works for young people. *You and Me and the Space Between* was able to engage local artists as narrator in the relevant language for audiences internationally.

Similarly, *The Shadow King* by Malthouse Theatre also achieved international recognition. Originally presented by the Melbourne, Sydney, Perth, Adelaide and Brisbane Festivals between 2013 and 2014, the performance went on to be shown at The Barbican, London in 2016.

Co-commissioning can enable festivals to present new Australian works, particularly those of scale and ambition. Such works can attract large audiences, including both Australians and international visitors. Those that go on to be selected for international touring can also contribute to the festivals' – and Australia's – reputation among international audiences.



*You and Me and the Space Between* by Terrapin Puppet Theatre. Credit: Peter Mathew

<sup>29</sup> Australia Council 2017, *Connecting Australians: Results of the National Arts Participation Survey*, June 2017, Sydney. <http://www.australiacouncil.gov.au/research/connecting-australians/>

<sup>30</sup> Wynne, E 2018, *Perth's Fringe Festival grows to third biggest in the world in just seven years*, ABC, 26 January 2018. <http://www.abc.net.au/news/2018-01-26/perth-fringe-festival-grows-to-be-third-biggest-world/9357046>

<sup>31</sup> World Fringe 2018, viewed 4 October 2018. <http://www.worldfringe.com/>

<sup>32</sup> Melbourne Fringe Festival 2017, *2017 Melbourne Fringe Festival Report*, available at [https://issuu.com/melbourne\\_fringe/docs/mff\\_festival\\_report\\_online](https://issuu.com/melbourne_fringe/docs/mff_festival_report_online)

<sup>33</sup> Darwin Festival 2017, *Darwin Festival 2017 Annual Review*, available at [https://issuu.com/darwin\\_festival/docs/dfes0057\\_festival\\_annual\\_review\\_iss](https://issuu.com/darwin_festival/docs/dfes0057_festival_annual_review_iss)

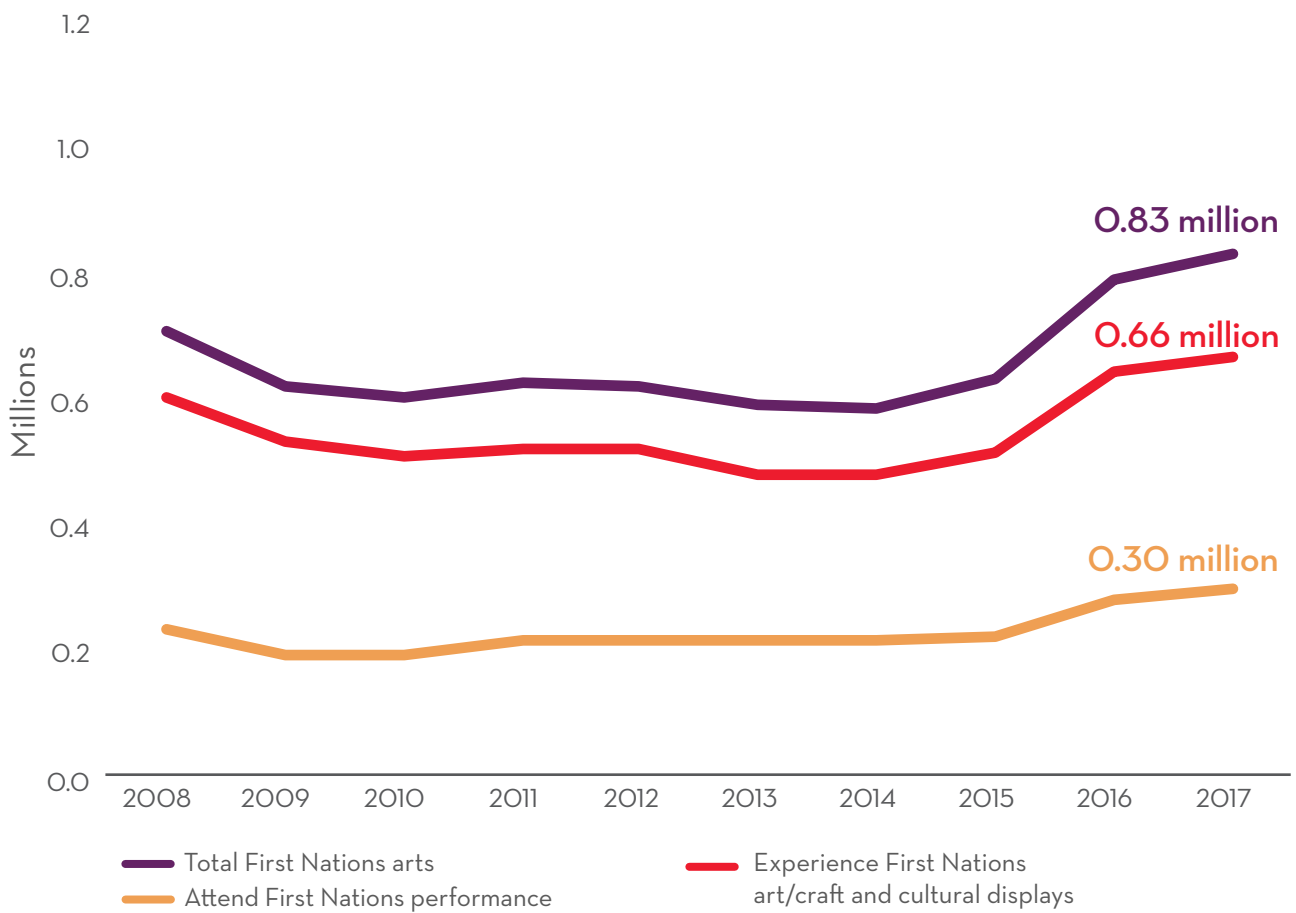
# FIRST NATIONS ARTS ENGAGE INTERNATIONAL TOURISTS, ESPECIALLY THOSE WHO TRAVEL OUTSIDE CAPITAL CITIES

*Australia's unique position as home to the world's oldest living culture is part of what makes Australia such a special place to visit.*

- Nearly 830,000 international tourists engaged with First Nations arts while in Australia in 2017, an increase of 41% since 2013. This incorporates increased attendance at First Nations performances as well as attendance at art, craft or cultural displays.
- One in four international arts tourists engaged with First Nations arts (24%) as did more than one in four international tourists travelling in school tour groups (28%).
- Engagement with First Nations arts was higher for international arts tourists who travelled outside capital cities. More than a third of these travellers attended a First Nations arts activity in 2017 (36%), compared to 24% of international arts tourists overall.
- Arts tourists who visited regional areas of the NT had particularly high levels of engagement – eight in ten attended a First Nations arts activity while visiting Australia in 2017 (79%), more than triple the numbers of international arts tourists overall (24%). Of arts tourists who visited Darwin, 63% attended a First Nations arts activity in Australia.
- Arts tourists who visited regional SA (53%), regional QLD (46%), and Adelaide (42%) were also highly engaged with First Nations arts while visiting Australia.
- While a quarter of tourists who attended First Nations arts were aged 25 to 34 years, arts tourists aged over 65 years were the most engaged age group. Nearly 30% of those aged over 65 attended, compared to 24% across all age groups.
- While larger numbers came from Asia, including more than half (56%) of international tourist audiences for First Nations performances, the smaller cohort of North American tourists were more engaged as a group. More than one in three North American arts tourists attended First Nations arts (35%) compared to one in four of all arts tourists (24%). European arts tourists were also highly engaged with First Nations arts – 33% attended while in Australia.
- Holiday-makers comprise a large segment of the international tourist audience at First Nations arts events – particularly those travelling solo. Nearly two thirds of tourists who engaged with First Nations arts were on holiday, and 45% were unaccompanied travellers.

**Arts tourists who visited regional areas of the NT had particularly high levels of engagement – eight in ten attended a First Nations arts activity while visiting Australia in 2017**

Growth trends in international tourist numbers for First Nations arts activities 2008–2017



## INDIGENOUS-OWNED ART CENTRES GENERATE TOURISM IN REGIONAL AREAS

First Nations arts are expressions of the oldest continuous living culture in the world, and storytelling stretching back for millennia. Regional and remote Australia is home to around 90 remote art centres<sup>34</sup> and the heart of Australia's world famous visual art movement.<sup>35</sup>

Art centres play an important cultural, economic and social role for communities in remote areas. In addition to providing employment opportunities and income to artists from art sales they are community hubs, support cultural transmission and play a role in the wellbeing of the entire community.<sup>36</sup>

Increased connectedness to regional and remote Australia has activated international markets for First Nations art and continues to create interest in First Nations arts among international visitors to Australia. Art centres can connect artists in remote communities to art markets and promote cultural and economic development and sustainability for remote artists and centres.

The NT's Indigenous Arts Trail program encourages visitors to explore and engage with First Nations arts during their stay, and increases access for international visitors to experience First Nations arts.<sup>37</sup>

Fairs such as the Cairns Indigenous Art Fair (CIAF) and Darwin Aboriginal Art Fair (DAAF) are a platform for First Nations arts, showcasing works from some of the most remote First Nations communities in Australia. Income from art sales is returned to the community, where artists directly benefit.

The *New York Times* recognised the Top End of Australia as a place to visit in 2018, partly due to the international interest surrounding DAAF.<sup>38</sup> Major art fairs like these continue to grow in attendance, both fairs saw record numbers of attendees in 2017. CIAF welcomed 50,000 attendees in 2017.<sup>39</sup>



Anne Dixon painting, Ikuntji Artists.  
Credit: Christian Koch

34 Ninti One: CRC Remote Economic Participation 2015, *Policy Briefing: Aboriginal and Torres Strait Islander Art Economies Project*, available at <https://www.nintione.com.au/resources/nol/aboriginal-and-torres-strait-islander-art-economies-project-policy-briefing/>

35 Department of Communication and the Arts 2018, *Indigenous Visual Art Industry Support program*. <https://www.arts.gov.au/funding-and-support/indigenous-visual-arts-industry-support-program>

36 Throsby, D & Peteskaya, E 2016, *Integrating Art Production and Economic Development in the Kimberley*, available at <https://www.mq.edu.au>

37 Northern Territory Government 2018, *Indigenous Arts Trail*, viewed 4 October 2018. <https://artstrail.nt.gov.au/>

38 New York Times 2018, *52 Places to Go in 2018*, New York Times, viewed 29 October 2018. <https://www.nytimes.com/interactive/2018/travel/places-to-visit.html>

39 Cairns Indigenous Art Fair 2017, *CIAF 2017 wraps up with record sales*, CIAF News, 7 August 2017. <https://ciaf.com.au/news/ciaf-2017-wraps-record-sales>



## INDUSTRY STANDARDS ADVOCATE FOR FAIR AND ETHICAL TRADE

Income from art sales protects the livelihoods of First Nations artists and their communities. The rising profile of First Nations art has driven the creation of fake and imitation art which look and feel authentic but have no connections to First Nations culture.

Fake art is often marketed to tourists who do not know or do not understand the harm to First Nations communities that purchasing inauthentic art creates. The Indigenous Art Code advocates for ethical trading in First Nations art and the Fake Art Harms Culture campaign aims to stop the production and sale of imitation art.<sup>40</sup>

Tourists who attended First Nations arts were more likely to travel beyond capital cities such as Sydney and Melbourne and into regional Australia. This indicates that tourists travel to attend First Nations art, reflecting a demand for authentic experiences.

Authenticity is highly valued among audiences who seek trustworthiness and legitimacy in their engagement with First Nations arts.<sup>41</sup>

## FIRST NATIONS ARTS AND CULTURE FEATURE IN THE TOURISM HUB OF SYDNEY HARBOUR

*Badu Gili* lights up the Sydney Opera House, with the works of prominent First Nations artists from across Australia and the Torres Strait Islands projected onto the sails.<sup>42</sup>

*Badu Gili* makes First Nations art accessible to both domestic and international audiences and in 2017 this daily celebration of First Nations art was popular with more than 160,000 domestic and international visitors, as well as a substantial global audience online.



*Badu Gili*, Sydney Opera House. Artist: Alick Tipoti.  
Credit: Daniel Boud

<sup>40</sup> The Indigenous Art Code 2018, viewed 4 October 2018. <https://indigenouartcode.org/the-indigenous-art-code/>

The Indigenous Art Code 2018, Fake Art Harms Culture, viewed 4 October 2018. <https://indigenouartcode.org/fake-art-harms-culture/>

<sup>41</sup> Australia Council for the Arts 2015, *Building Audiences: Aboriginal and Torres Strait Islander Arts*, August 2015. <http://www.australiacouncil.gov.au/research/building-audiences-aboriginal-and-torres-strait-islander-arts/>

<sup>42</sup> Sydney Opera House 2018, *The Story of Badu Gili*, 10 September 2018. <https://www.sydneyoperahouse.com/backstage/backstage-articles/badu-gili-lights-on.html>

# INTERNATIONAL ARTS TOURISTS ARE MORE LIKELY TO VISIT REGIONAL AUSTRALIA THAN INTERNATIONAL TOURISTS OVERALL

*While large arts venues and major events in capital cities attract the largest numbers of international tourists, there is opportunity for a broad range of arts offerings across the country to attract tourists seeking diverse and authentic experiences. International visitors who engage with the arts are already more likely to go beyond the east coast states and to visit regional locations.*

- Arts tourists may have visited both regional and capital city areas.
- The vast majority of international tourists visit Australia’s capital cities (and the Gold Coast)<sup>43</sup> – 93% of all tourists and 96% of arts tourists in 2017. This is unsurprising given that the majority of international airports and ports, and many major tourist attractions are located in cities.
- Arts tourists are more likely to travel outside capital cities (42%) than overall tourists (34%). This trend is growing – since 2013 there has been a 41% increase in international arts tourists visiting regional areas, while total international tourists visiting regional areas increased by 37%.
- Arts tourists who had visited regional areas were more likely to attend art/craft workshops and studios, and First Nations arts than arts tourists who visited capital cities. Australian craft practitioners, visual artists and community arts and cultural development (CACD) artists are the most likely of all practising professional artists to live outside capital cities.<sup>44</sup>
- Conversely, arts tourists who visited capital cities are slightly more likely than regional arts tourists to attend museums and art galleries, as well as festivals, fairs and cultural events.

The many rich arts offerings in regional areas may be helping to drive regional tourism among international visitors.

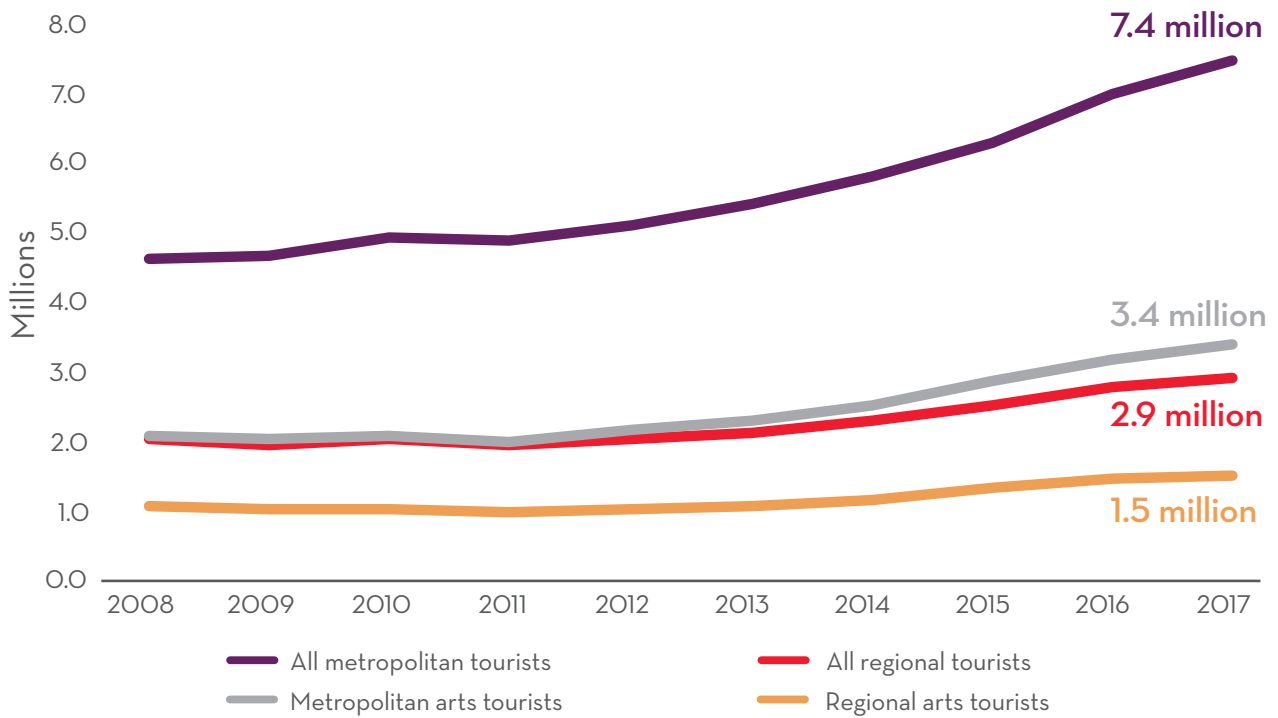
While it is not possible to identify specifically where international tourists participated in arts activities (only that they both engaged with the arts *and* travelled to certain locations), it is clear that those international tourists who are interested in the arts are more likely to seek diverse travel experiences beyond capital cities.

**The many rich arts offerings in regional areas may be helping to drive regional tourism among international visitors.**

<sup>43</sup> Tourism Research Australia includes the Gold Coast in its capital cities variable “capital cities and the Gold Coast”, and Australia Council includes the Gold Coast in its definition of metropolitan areas of the state. Therefore the Gold Coast has been included within the Brisbane capital city and metropolitan area in the research results in this report.

<sup>44</sup> 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/>

Metropolitan and regional international tourist trends 2008-2017



## ARTS EXPERIENCES AND CREATIVITY ARE STRONG IN REGIONAL AUSTRALIA

One in six Australian artists live in regional cities and towns. Residents of regional Australia are as likely to creatively participate in the arts as residents of metropolitan Australia, and living in a regional area does not substantially affect overall arts attendance.<sup>45</sup> For example, there are approximately 50 exhibition spaces throughout regional Victoria alone.<sup>46</sup>

Touring to regional Australia not only allows arts and artists to reach new audiences, but supports the development of the local arts economy and increases opportunities for cultural tourism. In addition to indoor spaces, regional Australian towns are also using the built landscape as a canvas.

Painted grain silos across regional Australia form silo trails as towns leverage these giant canvases to highlight their creativity, their resilience and desirability as tourism destinations.

Between 2015 and 2018 and through a partnership with cultural organisation FORM and grain handler CBH Group, six country towns in the Wheatbelt region of Western Australia were painted by internationally acclaimed urban artists. The PUBLIC Silo

Trail has transformed Western Australia's regional heartland into an open-air art gallery, raising the profile and awareness of these towns being an interesting and attractive place to visit. The trail aims to increase opportunities for tourism and the economic flow on effects of increased visitation, while also improving arts access to regional communities along the trail.<sup>47</sup>

The silos in Northam, Western Australia were the first to be painted in Australia, by international artists Phlegm and HENSE, who are renowned for large scale paintings. Both artists were inspired by the history of the local area in their designs.<sup>48</sup> Artworks followed in Ravensthorpe, Merredin, Albany, Newdegate and Pingrup with a mix of Western Australian and international talent.

Silos are a common sight across regional Australia. Painted, they attract tourists to country towns, with visitors altering their driving route to include a town with silo art.<sup>49</sup>

There is strong and growing potential for the arts to help drive regional tourism. In 2016–17, 43 cents in every tourism dollar went to regional Australia.<sup>50</sup>



Phlegm & Hense for PUBLIC Silo Trail, Northam, 2015. Photograph by Bewley Shaylor, courtesy of FORM.

45 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/>

46 Art Almanac 2018, VIC November 2018 Listings, viewed 29 October 2018. <https://www.art-almanac.com.au/whats-on/vic/>  
Number of regional venues counted in Victoria.

47 Public Silo Trail 2018, About The Trail, viewed 15 October 2018. <https://www.publicsilotrail.com/about/>

48 Public Silo Trail 2018, Northam, viewed 15 October 2018. <https://www.publicsilotrail.com/northam/>

Honeybone, E 2018, *Street art movement from WA kickstarts PUBLIC Silo Trail and national following*, 9 September 2018. <http://www.abc.net.au/news/2018-09-09/street-art-movement-from-wa-kickstarts-public-silo-art-trail/10200238>

49 Honeybone, E 2018, *Street art movement from WA kickstarts PUBLIC Silo Trail and national following*, 9 September 2018. <http://www.abc.net.au/news/2018-09-09/street-art-movement-from-wa-kickstarts-public-silo-art-trail/10200238>

50 Tourism Research Australia 2017, *State of the Industry 2016-17*, available at <https://www.tra.gov.au/tra/soi/2017/index.html>

# STATES AND TERRITORIES SMALLER IN AREA OR POPULATION ARE ATTRACTING A HIGH PROPORTION OF ARTS TOURISTS

*Arts tourists are travelling beyond east coast states.*

The NT, SA, Tasmania and the ACT attract smaller numbers of total international tourists.

However, a high proportion of the tourists who visit these states and territories were arts tourists compared to those who visit NSW, Victoria and Queensland.

In 2017:

- More than three quarters of all tourists who visited the NT were arts tourists (78%), compared to half who visited NSW (50%).
- Around two thirds of all tourists who visited SA (65%), Tasmania (68%) or the ACT (69%) were arts tourists.

For most states, smaller numbers of tourists overall go to regional areas. The NT is the exception, attracting higher absolute tourist numbers regionally than Darwin.

In 2017:

- More than three quarters of total international visitors to the NT went to regional areas (78%), compared to only 44% who visited Darwin.
- The vast majority of tourists who visited regional NT were arts tourists (85%).

A higher proportion of visitors to regional areas of NSW, Victoria, QLD, SA and WA engaged with the arts in 2017, compared to the proportion who visited capital city areas of those states.

## THE ACT'S NATIONAL COLLECTING INSTITUTIONS ARE ATTRACTING ARTS TOURISTS

In 2017, there were more than 240,000 international tourists who visited the ACT, and 69% of those were international arts tourists.

Overall, visits to national collecting institutions are increasing with more than 10.7 million visits overall in 2016–17.<sup>51</sup>

The ACT has a concentration of cultural institutions which hold blockbuster exhibitions throughout the year, attracting high tourist numbers. The institutions are one of the ACT's biggest drawcards for tourists.

The National Gallery of Australia's *Versailles: Treasures from the Palace* exhibition drove recreational and education tourism with more than 190,000 visitors, of whom one in seven were attending from outside the ACT.<sup>52</sup>

Other factors have made the ACT more accessible for international tourists. More flights increase the number of inbound seats. The commencement of direct international flights by Singapore Airlines (since 2016) and Qatar Airways (from May 2018) has assisted in driving visitation growth from important Asian and European markets.<sup>53</sup>

<sup>51</sup> Department of Communications and the Arts 2017, *Impact of our National Cultural Institutions 2016–17 results*, viewed 29 October 2018. <https://www.arts.gov.au/what-we-do/museums-libraries-and-galleries/impact-our-national-cultural-institutions>

<sup>52</sup> Visit Canberra 2017, *NGA celebrates more than 190,000 visitors to Versailles Exhibition*, 21 April 2017. <https://tourism.act.gov.au/2017/04/nga-celebrates-more-than-190000-visitors-to-versailles-exhibition/>

<sup>53</sup> Department of Home Affairs 2018, *Overseas Arrivals and Departures data*. Burgess K 2018, *Singapore Airlines announces big changes to Canberra flights*, The Canberra Times, 24 January 2018. <https://www.canberratimes.com.au/national/act/singapore-airlines-changes-canberra-services-cuts-flights-to-wellington-nz-20180124-hondhi.html>

## THERE ARE ARTS OFFERINGS ACROSS METROPOLITAN AND REGIONAL SOUTH AUSTRALIA

In 2017 more than 460,000 international tourists visited SA. 65% of those visitors engaged with the arts while in Australia.

SA's regions are hubs of creativity. For example, Kangaroo Island has a high concentration of arts and culture with over ten galleries and creative spaces, and is a popular tourist destination.<sup>54</sup>

Three quarters (75%) of international tourists who visited regional SA were arts tourists, compared to two thirds (66%) of tourists who visited Adelaide

As well as engagement in regional SA, Adelaide has continued to grow attendance numbers at major festivals:

- Adelaide Festival had its most successful year in 2018, with record ticket sales and attendance numbers.<sup>55</sup>
- The 2018 Adelaide Fringe Festival surpassed previous records to sell over 700,000 tickets, up 7.6% on the previous year.<sup>56</sup> Between 2013 and 2017 the total number of international tourists visiting the greater Adelaide metropolitan area increased by 22%, while the number who visited greater metropolitan Adelaide and attended festivals, fairs or cultural events while they were in Australia increased by 27%.



Adelaide Festival 2018, Lost and Found Orchestra. Credit: Tony Lewis

54 South Australian Tourism Commission 2018, *Kangaroo Island Fact Sheet*, viewed 4 October 2018. available at <http://tourism.sa.gov.au/about/regions/kangaroo-island>

55 Adelaide Festival 2018, *2018 Adelaide Festival Announces Biggest Box Office Takings In Its History*, 16 March 2018. <https://www.adelaidefestival.com.au/news/boxoffice2018>

56 Adelaide Fringe 2018, *Adelaide Fringe Hits 700k Mark For Ticket Sales*, 16 March 2018. <https://adelaidefringe.com.au/news/adelaide-fringe-hits-700k-mark-for-ticket-sales>

## ADDITIONAL RESOURCES

Key arts tourism findings are detailed in this report. For more information on tourism in Australia more broadly, visit the Tourism Research Australia website <https://www.tra.gov.au/International/international-tourism-trends> or Tourism Australia for detailed market reports <http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

There are also additional resources available to those who want to market activities to international visitors to Australia:

Tourism Australia's Tourism Export Toolkit <http://www.tourism.australia.com/en/events-and-tools/industry-resources/resources-for-industry/tourism-export-toolkit.html>

The important and growing role the arts plays in international tourism to Australia is a powerful tool for building national identity, and for sharing Australian culture, stories and perspectives with the world.

Information about international tourist behaviour and activity highlights the potential for the arts to help drive and support tourism, and for the arts sector to engage with international visitors.

The information in this report contributes to evidence about the critical role of the arts in supporting economic activity, and in contributing to cultural exchange, cultural diplomacy and our international reputation. The Australia Council will continue to update and develop the body of information available around international arts tourism and the value this creates for multiple sectors in the economy.

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](#)
- [Tourism ACT](#)

## EXPLANATORY NOTES

*Total international tourist and international arts tourist numbers were gathered from Tourism Research Australia (TRA)'s International Visitor Survey (IVS) which surveys 40,000 departing, short-term international travellers per year who are aged 15 years and over who have been visiting Australia.*

The survey is conducted by Computer Assisted Personal Interviewing (CAPI) in the departure lounges of the eight major international airports: Sydney, Melbourne, Brisbane, Cairns, Perth, Adelaide, Darwin and the Gold Coast.

From the IVS database, estimates at the national, state/territory, capital city and Gold Coast, rest of Australia and rest of state/territory level were drawn for the following:

- The total number of international visitors to Australia who were classified as international arts tourists based on having attended at least one arts activity while in Australia.
- International arts tourists as a proportion of total international visitors to Australia.
- The numbers and proportion of total international visitors and international arts tourists who had undertaken specific activities while in Australia.
- The numbers and proportion of total international tourists and international arts tourists who had visited a state/territory, capital city and Gold Coast, rest of Australia and rest of state/territory and taken part in or attended a certain activity while in Australia.

- The numbers and proportion of total international tourists and international arts tourists from a particular country, region or continent and those who took part in or attended a certain activity while in Australia. Continents and stopover regions are defined in the 'Variable definitions' section.
- The numbers and proportion of total international and international arts tourists who visited Australia split by gender, age group, first or return visitation, main reason for trip, travel party type and who took part in or attended a certain activity while in Australia.

Activities undertaken by international visitors to Australia are reflective of data on tourism activities in Australia collected by TRA in their IVS on a calendar year basis up to the year ending December 2017. The term 'international arts tourist' is not a mutually exclusive category. International arts tourists may have undertaken a number of other activities while in Australia.



### A COMPLETE PICTURE OF INTERNATIONAL 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. For example, it is not possible to identify specifically where international tourists participated in arts activities (only that they both engaged with the arts and travelled to certain locations).

This is why we include a number of other sources such as case studies – so that a broader picture of international 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 arts tourists in this report, a third (33%) of total international tourists visited a history/heritage building, site or monument while in Australia in 2017, an increase of 68% since 2013.

### SPEND

Activities are reflective of data on tourism activities in Australia collected by TRA in their IVS up to the year ending December 2017.

The term ‘international arts tourist’ is not a mutually exclusive category, and arts tourists may have undertaken a number of other activities while in Australia in addition to at least one arts activity.

Given this rationale, spend refers to all spend in Australia *by* international arts tourists not spend specifically *on* arts activities. Spend excludes pre-paid airfares and travel packages.

### LOCATION OF ACTIVITIES

It is important to note that the IVS is not able to identify the location where international visitors engaged with a specific activity while on their trip.

The data only allows estimates and trends of how and where arts tourists may be engaging. Although arts tourists may have visited a particular region of Australia and engaged in a particular activity, it is not conclusive that the activity occurred in that region.

### STOPOVERS

A stopover is any location where the visitor had an overnight stay while visiting Australia.

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, despite that they may have attended multiple arts activities in multiple states. Each state is treated as its own distinct group of:

- tourists visiting the state
- arts tourists visiting the state

Given this, the national percentage for arts tourists (43%) is lower than the equivalent percentages for nearly all states.

### **REASON FOR TRIP DATA**

TRA has published IVS data for main reason for trip up to and including the year ending December 2017. At the time of publishing this data represents official estimates for reporting purposes.

However, TRA has not published any international visitor data by purpose of visit subsequently as there have been issues with the quality of passenger data supplied to it by the Department of Home Affairs. There are no issues with the survey collection. Work is currently in progress to resolve the issues with the passenger data. When resolved it is likely that a back cast of TRA data will be required.

### **REGIONAL AND METROPOLITAN AREAS OF AUSTRALIA**

#### **Metropolitan**

The term 'Metropolitan' is used interchangeably with 'capital cities and the Gold Coast' and 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. Therefore, the Gold Coast has been included within the 'Brisbane capital city and metropolitan area' filter in the research results in this report.

#### **Regional**

The term 'regional' is used interchangeably with 'rest of Australia' and includes all areas of each state outside capital cities and the Gold Coast.





# VARIABLE DEFINITIONS

*Tourism Research Australia's tourism regions have been grouped into metropolitan (capital city) regions and regional (rest of Australia) regions for each state and territory.*

## STOPOVER LOCATION

### **NSW Metro**

*Sydney*

### **NSW Regional**

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

### **Qld Metro**

*Brisbane, Gold Coast*

### **Qld Regional**

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

### **Victoria Metro**

*Melbourne and Melbourne East*

### **Victoria Regional**

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

### **SA Metro**

*Adelaide and Adelaide Hills*

### **SA Regional**

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

### **WA Metro**

*Perth*

### **WA Regional**

*Australia's North West, Australia's Coral Coast, Australia's South West and Australia's Golden Outback*

### **Tasmania Metro**

*Hobart*

### **Tasmania Regional**

*Launceston and the North, East Coast, West Coast and North West*

### **NT Metro**

*Darwin*

### **NT Regional**

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

### **ACT**

*Canberra*

## REGION OF RESIDENCE

### Europe

*United Kingdom, Germany, Scandinavia, France, Italy, Netherlands, Switzerland, Other Europe*

### Asia

*Japan, Hong Kong, Singapore, Malaysia, Indonesia, Taiwan, Korea, China, India, Thailand, Other Asia*

### Middle East

*Middle East and Northern Africa nfd, Bahrain, Gaza Strip and West Bank, Iran, Iraq, Jordan, Kuwait, Lebanon, Oman, Qatar, Saudi Arabia, Syria, Turkey, United Arab Emirates, Yemen, Israel*

### Africa

*Algeria, Egypt, Libya, Morocco, Sudan, Tunisia, North Africa nfd, Africa nfd, Benin, Burkina Faso, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of Congo, Cote d'Ivoire, Equatorial Guinea, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Liberia, Mali, Mauritania, Niger, Nigeria, Sao Tome and Principe, Senegal, Sierra Leone, Togo, Angola, Botswana, Burundi, Comoros, Djibouti, Eritrea, Ethiopia, Kenya, Lesotho, Madagascar, Malawi, Mauritius, Mayotte, Mozambique, Namibia, Western Sahara, Reunion, Rwanda, St Helena, Seychelles, Somalia, South Africa, Swaziland, Tanzania, Uganda, Zambia, Zimbabwe, Southern and East Africa nfd*

### North America (including Central America and the Caribbean)

*United States of America, Canada, Central America nfd, Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama, Antigua and Barbuda, Aruba, Bahamas, Barbados, Cayman Islands, Cuba, Dominica, Dominican Republic, Grenada, Guadeloupe, Haiti, Jamaica, Martinique, Netherlands Antilles, Puerto Rico, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands, British Virgin Islands, US Virgin Islands, Bermuda, St Pierre and Miquelon*

### South America

*Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Falkland Islands, French Guiana, Guyana, Paraguay, Peru, Suriname, Uruguay, Venezuela, South America nfd*

### Oceania

*New Zealand, Norfolk Island, Australian External Territories nec, New Caledonia, Papua New Guinea, Solomon Islands, Vanuatu, Guam, Kiribati, Marshall Islands, Federated States of Micronesia, Nauru, Northern Mariana Islands, Palau, Cook Islands, Fiji, Tahiti/French Polynesia, Niue, Samoa, American Samoa, Tokelau, Tonga, Tuvalu, Wallis and Futuna, Polynesia (excludes Hawaii) nfd*



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