

HARNESSING ONE OF AUSTRALIA'S FASTEST-GROWING TOURISM SEGMENTS



CULTURAL
ATTRactions
OF AUSTRALIA

Globally, cultural tourism has grown by 23% over the past five years, compared to total tourism growth of 19%.

Culture and Tourism Synergies, UNWTO, 2018.

Chair's Welcome

It is with great pleasure that I introduce you to Cultural Attractions of Australia. An Australian first, this industry-led collective of iconic Australian cultural tourism attractions has joined forces to present the best of our cultural offering to the world and give Australians the opportunity to experience their cultural heritage from new perspectives.

Launched in April 2019, Cultural Attractions of Australia provides a single point of contact for travellers, trade partners and media to access premium, behind-the-scenes cultural experiences in iconic locations. As a collective, its strength lies in the diversity and iconic nature of the sites and collections represented, as well as the direct connection they hold with the people and cultures of Australia.

We look forward to promoting an unparalleled suite of premium cultural experiences that fuse the thrill of discovery with learning and participation, providing visitors with memorable insights into what it means to be Australian, through the lens of both our history and our contemporary life.



Jennifer Ganske
Chair
Cultural Attractions of Australia

FRONT COVER IMAGE: SYDNEY OPERA HOUSE,
PHOTO: HAMILTON LUND.

IMAGE: PORT ARTHUR HISTORIC SITE,
PHOTO: HYPE TV.

International cultural visitors to Australia stay 25% longer and spend 20% more than other visitors.

IVS, Tourism Research Australia, 2019.



IMAGE: AUSTRALIAN PARLIAMENT HOUSE, PHOTO: ADSPIC.

Minister's Foreword

I would like to extend a warm welcome to Cultural Attractions of Australia – the latest entry to join the ranks of Tourism Australia's Signature Experiences of Australia program.

The Signature Experiences of Australia program is a partnership between Tourism Australia and industry, developed to attract more high value travellers and drive visitation to some of Australia's most famous arts and cultural attractions, offering visitors a premium, 'behind the scenes' experience.

Australia has a long list of cultural attractions and these unique experiences will allow visitors to immerse themselves in Australian history, life and culture in ways that have never been offered before.

Some of our most famous cultural attractions including the National Gallery of Australia, Sovereign Hill and the Melbourne Cricket Ground feature in the program comprising 22 bespoke tourism experiences.

Experiences under the program range from a private tour of the National Gallery of Victoria, to walking onto a production set at the Sydney Opera House all the way through to an exclusive dinner at MONA in Hobart.

Cultural tourism is on the rise, with three in every 10 international visitors to Australia now visiting a museum or gallery. Through our vast array of cultural attractions and initiatives such as this one that target the high value traveller, we have a great opportunity to grow this very lucrative segment of the market.

The Morrison Government recognises the huge potential of the high value traveller and the value to the economy, and that's why we're backing this program and current Tourism Australia campaigns such as UnDiscover Australia that specifically target high value travellers from South-East Asia, Britain and Japan.

The Cultural Attractions of Australia collective joins seven others within the Signature Experiences of Australia program including wineries, luxury lodges, golf courses, walks, Aboriginal guided experiences, fishing adventures and wildlife.

Australia is one of the most desirable destinations on earth, with a combination of world-class natural beauty and wildlife, exceptional food and wine, and a cultural heritage that cannot be found anywhere else.

The addition of Cultural Attractions of Australia to this program shines a spotlight on our country's rich and unique history and will not only help to tell our story and elevate the nation's cultural tourism sector as a whole, but also enhance the visitor experience for international travellers and create memories to last a lifetime.

Senator the Hon Simon Birmingham

Minister for Trade, Tourism and Investment
Deputy Leader of the Government in the Senate
Senator for South Australia

‘Our culture is unique. It is a culture that is deeply shaped by more than 70,000 years of continued, unbroken Indigenous story telling. It reflects Australia’s two centuries of settlement from around the world. We are a diverse community of identities, faith, individual differences and pursuits, yet we have many shared values and our sense of nation is strong.’

A Culturally Ambitious Nation, Australia Council for the Arts, Strategic Plan, 2014-19.

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IMAGE: NATIONAL GALLERY OF VICTORIA,
MELBOURNE. PHOTO: TOBIAS TITZ.

WHY CULTURAL TOURISM?

Cultural tourism is the next frontier in Australia's international tourism marketing.

We have shown the world Australia's stunning natural wonders and, more recently, invited them to eat and drink at our table, now it's time to turn the spotlight onto our unique cultural tourism organisations and attractions.

Cultural tourism is growing globally and outperforming the international tourism market as a whole.

A survey of 69 countries by the United Nations World Tourism Organisation in 2018¹ found that:

- Cultural tourism has grown by 23% over the past five years, compared to total global tourism growth of 19%;
- 'The overall growth in tourism between 2010 and 2014 is much larger for those countries that specifically feature cultural tourism in their marketing policy (66%)';
- 'In recent decades, tourism and culture have become inextricably linked, partly due to the increased interest in culture, particularly as a source of local identity in the face of globalization';

- An average of 30% of inbound international tourists were motivated to travel by culture, and a further 17% participated in a cultural activity as a secondary activity, underlying the importance of seeing culture 'not just as an attractor for tourists, but also as an important element of the general tourism experience';

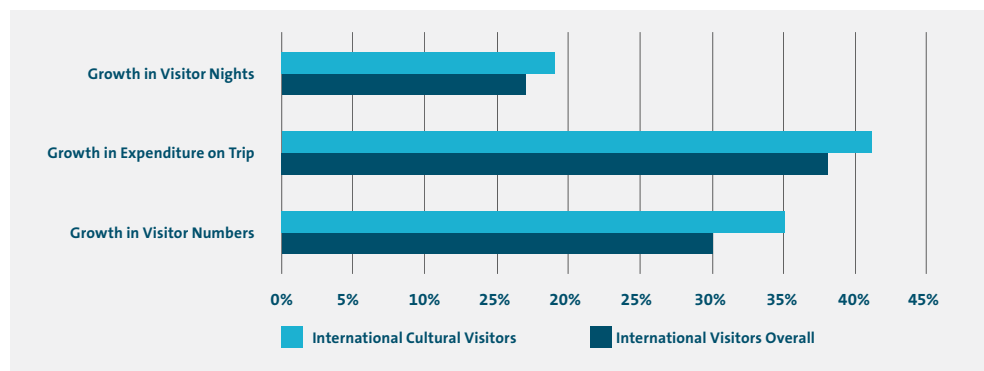
- 84% of the countries surveyed accorded cultural tourism a specific place in their marketing planning;

- Cultural tourism will remain a core international tourism segment.

Australian research² shows that:

- International cultural visitors to Australia stay 25% longer and spend 20% more than other visitors.
- Of international visitors to Australia in the year to March 2019, 53% participated in a cultural or heritage activity, therefore the cultural tourism segment represents over half of all international visitors to Australia.
- Over the past five years international cultural visitors have outperformed international visitors overall, as demonstrated by the chart below:

Comparing International Visitors Overall with International Cultural Visitors 2015-2019



1 CULTURE AND TOURISM SYNERGIES, UNWTO, 2018.
2 IVS, TOURISM RESEARCH AUSTRALIA, 2019.

WHY CULTURAL ATTRACTIONS OF AUSTRALIA?

Given the significance of the strategic opportunity cultural tourism represents, Australia's cultural organisations have joined forces to present the best of the country's cultural offering to the world, as a collective - **Cultural Attractions of Australia**.

Cultural Attractions of Australia will leverage the nation's iconic cultural assets and develop and promote tourism experiences to attract international High Value Travellers and give Australians the opportunity to see their much-loved cultural organisations through a completely new lens, as insiders. With focused, sufficiently resourced advocacy and promotion, the virtues and value of the Australian cultural offering become a means of significantly deepening Australia's brand and destination appeal at home and abroad.

Australia is a young nation of many cultures and its evolving national identity is shaped by the interplay of the ancient with the continually new. Australia's indigenous culture is the focus of another Tourism Australia Signature Experiences of Australia collective, Discover Aboriginal Experiences.

Australia's cultural attractions demonstrate how varied geographic, ethnic and cultural origins have been embraced and have reshaped the way the nation is defined. They also explore the Australian relationship and reaction to international art and culture, seeing the world through Australian eyes.

Australian culture respects the traditional while celebrating the audacious and irreverent and this is reflected in the nation's artistic, literary, performance and sporting stories. Leading cultural organisations and attractions curate the cultural narrative and provide visitors with a window into what it means to be Australian.

The member attractions and organisations of **Cultural Attractions of Australia** bring the diverse and intertwined influences of Australia's contemporary culture to life, such as history and heritage, film, performing arts, visual art, literature, music, entertainment and sport.

As **Cultural Attractions of Australia**, their collective voice is powerful, compelling and unforgettable.

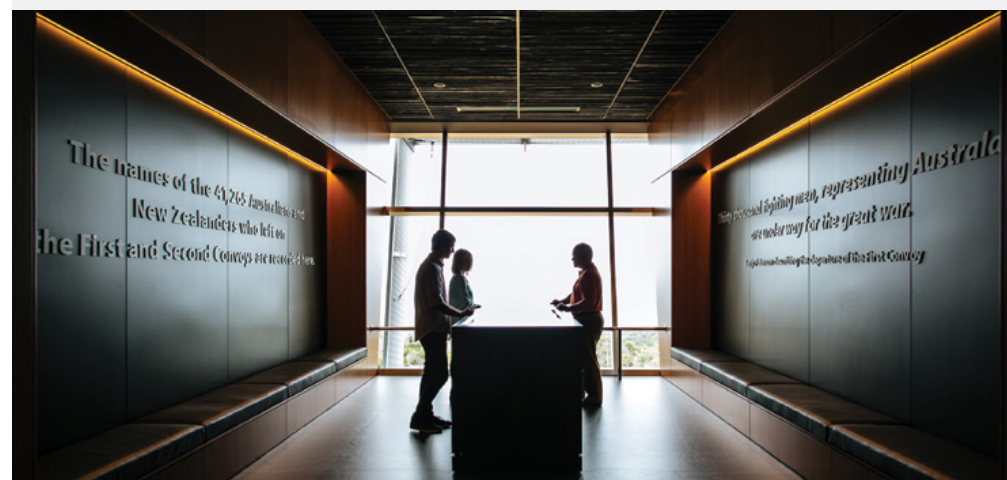


IMAGE: NATIONAL ANZAC CENTRE.

MEMBERSHIP AND STRUCTURE

Inaugural Cultural Attractions of Australia Board:

Jennifer Ganske	Director of Marketing The Sovereign Hill Museums Association
John Quertermous	Head of Marketing & Tourism Opera Australia
Erin Lightfoot	Managing Director Magnum Opus Partners
Noel Langdon	Dir/Sec: Cultural Attractions of Australia Association Dir/Sec: Canberra Region Tourism Leaders Forum Association Dir/Sec: National Education Tourism Association
Robbie Brammall	Director of Marketing and Communications Museum of Old and New Art
Sarah Hitchcock PSM	Head Commemoration and Visitor Engagement Australia War Memorial
Felicia Mariani	Chief Executive Victoria Tourism Industry Council
Sarah Staruskiewicz	Partnerships and Distribution Manager VisitCanberra
Executive Officer:	Jane Ross

Member organisations are recruited on an annual basis. The founding members of Cultural Attractions of Australia are:

- Adelaide Oval
- Arts Centre Melbourne
- Australian Parliament House
- Australian War Memorial
- Fremantle Prison
- Melbourne Cricket Ground
- MONA
- National Gallery of Australia
- National Anzac Centre
- National Gallery of Victoria
- Opera Australia
- Port Arthur Historic Site
- Qantas Founders Museum Longreach
- Sovereign Hill Outdoor Museum
- Sydney Opera House
- WA Maritime Museum

THE EXPERIENCES - EXPECT THE UNEXPECTED

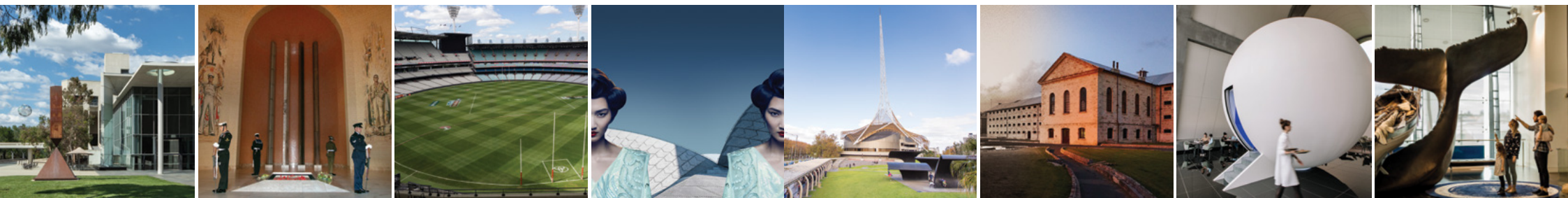
The experiences offered as part of **Cultural Attractions of Australia** are rare, premium, pre-packaged creative experiences, largely exclusive to the collective.

The founding members of Cultural Attractions of Australia invite visitors to expect the unexpected as they:

- Are completely transformed with personally-fitted wig, costume and full theatre makeup in preparation for a walk-on role with **Opera Australia** at the **Sydney Opera House**.
- Dine like a visiting dignitary at **Australian Parliament House**, at the **National Gallery of Australia** with a degustation menu inspired by works from Australia's national collection, or in the company of David Walsh - collector, gambler, self-professed maths nerd and owner of **MONA (Museum of Old and New Art)**.
- Take home a photo to be given pride of place of their very own name plate, displayed on **Adelaide Oval's** century old scoreboard (a rarely bestowed honour), or a photo recording the moment they walked the wings of both a Boeing 747 and 707 at the **Qantas Founders Museum**, the only place in the world where this is offered.
- Go behind the scenes at the **Australian War Memorial**, seeing memorabilia not usually publicly available, tailored to the individual traveller and their market. Go below decks in a decommissioned

military submarine, guided by a former service member at **WA Maritime Museum**. Or take a close-up look at the artworks created by inmates over the 140-year history of **Fremantle Prison** - including convict etchings, dot paintings, graffiti and tattoo art.

- Visit the **National Anzac Centre** pre-opening, giving a rare and emotive insight into the Anzac legend where it began, or enjoy exclusive after-hours access to Australia's largest art collection at the **National Gallery of Victoria** before dining in front of revered masterpiece, *The Banquet of Cleopatra*. Visit the **Melbourne Cricket Ground (MCG)** on a non-game day, stepping out onto the hallowed turf of the southern hemisphere's largest stadium.
- See World-Heritage-listed **Port Arthur Historic Site** through the eyes of a conservation specialist or **Sovereign Hill Outdoor Museum** through the eyes of some of its most intriguing characters, while in full 1850s costume.
- Experience the majesty of the **Sydney Opera House**, inside and out, with a guided tour and dinner under the sails, accompanied by a private opera recital. Take a true insider's tour of **Arts Centre Melbourne's** hidden corridors and backstage theatre spaces, Australian Music Vault and the internationally significant Australian Performing Arts Collection archive, not usually open to the public.



IMAGES LEFT TO RIGHT: NATIONAL GALLERY OF AUSTRALIA, BERT FLUGELMAN CONES 1982 (DETAIL), © BERT FLUGELMAN, PHOTO: TOURISM AUSTRALIA; HALL OF MEMORY, AUSTRALIAN WAR MEMORIAL; MELBOURNE CRICKET GROUND; OPERA AUSTRALIA, TURANDOT; ARTS CENTRE MELBOURNE, PHOTO: MARK GAMBINO; FREMANTLE PRISON; MONA (MUSEUM OF OLD AND NEW ART); WA MARITIME MUSEUM.

TOURISM AUSTRALIA'S SIGNATURE EXPERIENCES

In recognition of the growing global significance of Cultural Tourism, Tourism Australia has added **Cultural Attractions of Australia** to its Signature Experiences Program.

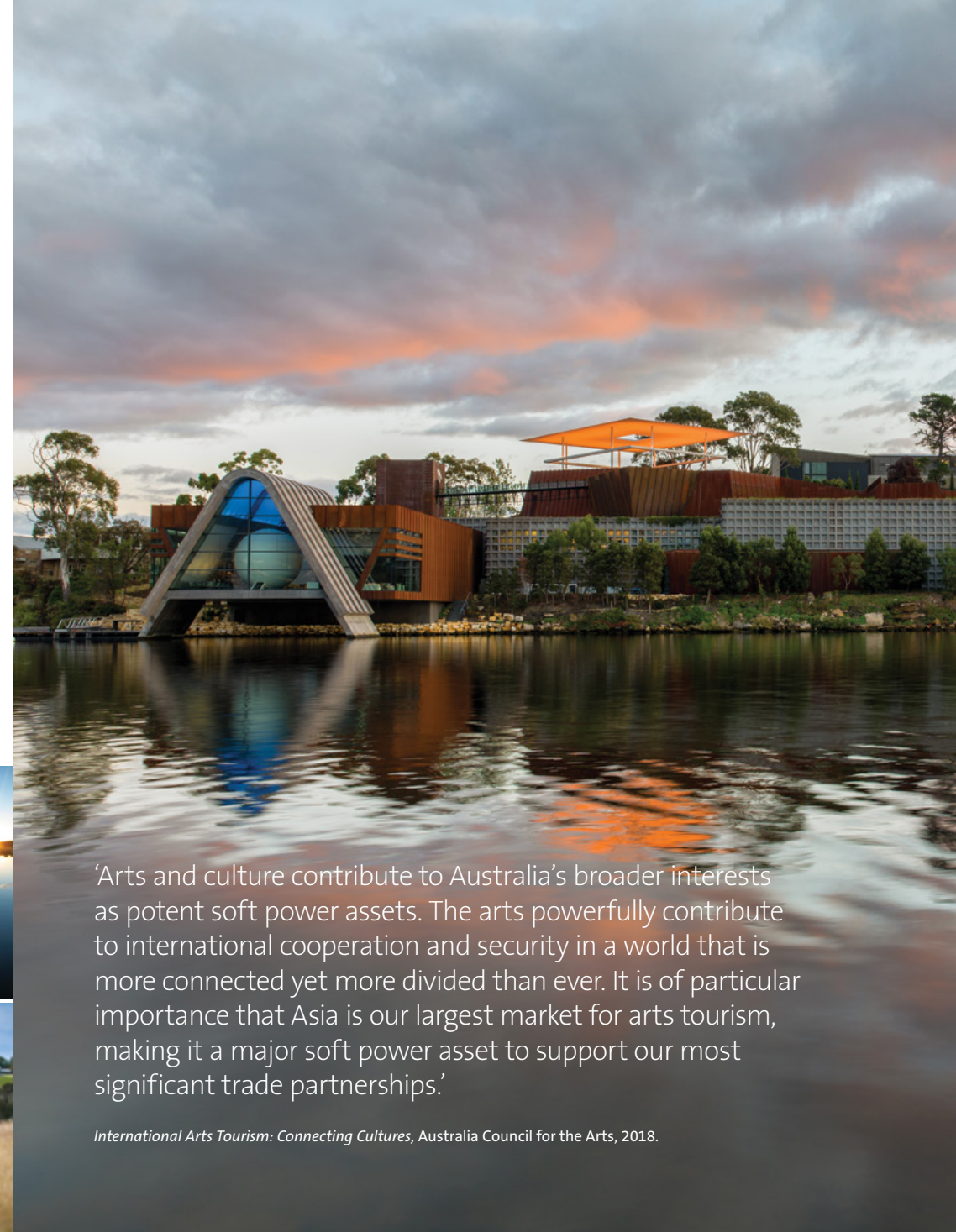
The program was developed to focus on High Value Travellers and their desire to seek out travel destinations with unique and authentic experiences which tap into their passion points.

To achieve this, Tourism Australia has partnered with industry to develop Signature Experiences of Australia - a program which packages and promotes Australia's outstanding tourism experiences within a variety of niche and special interest areas. The program is designed to grow visitation and attract High Value Travellers, encouraging regional dispersal and increased length of stay and expenditure.

Underpinned by extensive global research, the program lies at the heart of Tourism Australia's strategic focus on higher yielding travellers.

Signature Experiences of Australia Include:

- Australian Wildlife Journeys
- Cultural Attractions of Australia
- Discover Aboriginal Experiences
- Great Fishing Adventures of Australia
- Great Golf Courses of Australia
- Great Walks of Australia
- Luxury Lodges of Australia
- Ultimate Winery Experiences Australia



‘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 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.’

International Arts Tourism: Connecting Cultures, Australia Council for the Arts, 2018.

CULTURAL TOURISM AS A DRIVER

The Global Traveller Survey found that 20% of respondents who had never visited Australia would be more likely to do so for pre-packaged creative experiences (20%), followed by a more diverse offering (19%) and local/Aboriginal content (15%)³.

Research into cultural tourism in Australia indicates that culture is important both as motivation and secondary experience for many of Australia's key international tourism markets. Tourism Research Australia's *International Visitor Survey* in the year to March 2019⁴ shows the following:

- More than 8.5 million international tourists came to Australia in the year to March 2019 of which over 4.5 million (53%) engaged with culture, heritage and the arts while here.

- From a list of 21 options, 35% of international visitors asked why they chose to visit Australia nominated one or more of the following motivators:

- Interesting attractions
- Rich history and heritage
- Local festivals and events
- Museums, art galleries and/or theatres

- The chart below demonstrates that international cultural visitor numbers grew by 70% over the decade to March 2019, a higher growth rate than for international tourist numbers overall (63%). It also shows the significant growth that took place in some of the sub-sectors of the cultural tourism sector.

- The two main activities - *Visit history/heritage buildings, sites or monuments* and *Visit museums or art galleries* – accounted for 60 per cent of the cultural activities undertaken in the year to March 2019.

- These two activities have also grown significantly in the past decade; *Visit history/heritage buildings, sites or monuments* by 70% and *Visit museums or art galleries* by 74%. However, *Attend festivals/fairs or cultural events* grew more, by 82%, over the same period.

Research undertaken by Australia's state and territory tourism agencies further strengthens the case for investment in and promotion of cultural tourism, showing that:

- In 2015, 21% of international visitors to Melbourne were motivated by 'Creative' activities, behind only 'Friends' (26%) and 'Nature' (22%)⁵.

- In 2016, 67% of all international visitors to NSW participated in at least one cultural or heritage activity, representing growth of 8% over four years⁶.

- International cultural tourists to NSW in 2016 participated most in: Visiting history / heritage buildings / sites / monuments (71.8%); Museums or art galleries (55.7%); Festivals, fairs or cultural events (22.9%) and Performing Arts (18.3%)⁷.

- In the year ending December 2017 there were 2.9 million international visitors to Victoria. Of these, 1.8m or 63%, were considered 'cultural visitors', with 66% visiting museums or art galleries, 65% historical or heritage buildings, 24% for festivals and 23% participating in First People's cultural activity. The state experienced an 88% increase in international cultural tourism expenditure over four years to 2017⁸.

Cultural Tourism Visitor Activities to 2019

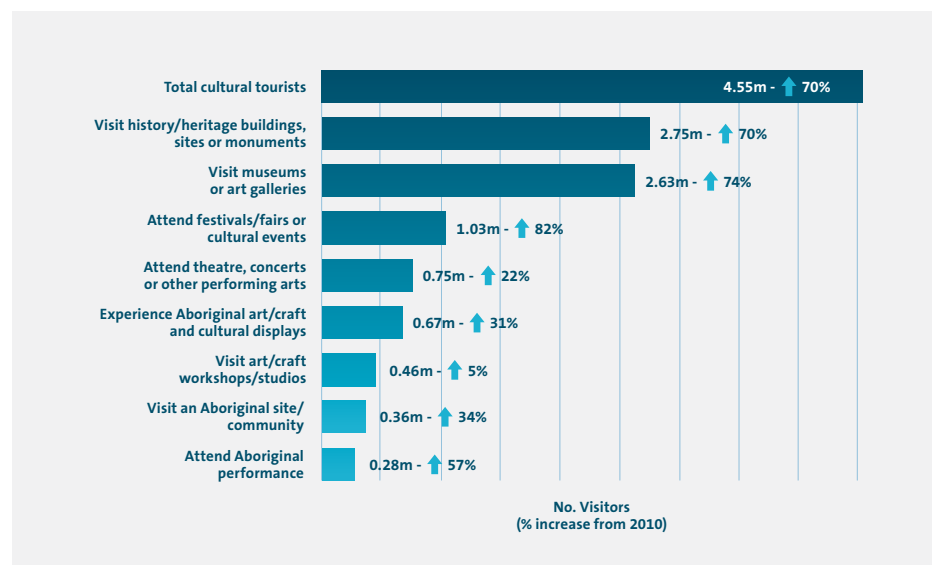


IMAGE: SOVEREIGN HILL

³ GLOBAL TRAVELLER SURVEY, BOSTON CONSULTING GROUP, 2016.

⁴ IVS, TOURISM RESEARCH AUSTRALIA, 2019.

⁵ MELBOURNE AS A GLOBAL CULTURAL DESTINATION, BOSTON CONSULTING GROUP, 2015.

⁶ CULTURAL AND HERITAGE TOURISM TO NSW (YEAR ENDED DEC 2016), DNSW.

⁷ IBID

⁸ WWW.CREATIVE.VIC.GOV.AU/RESEARCH/DATA/CULTURAL-TOURISM

THE ECONOMIC VALUE OF CULTURAL TOURISM

Market Overview

International Cultural visitors to Australia stay 25% longer and spend 20% more than other visitors⁹. Importantly, this runs counter to the general trend for international visitors to stay for shorter periods. The average trip duration to Australia has fallen by 8% since 2016¹⁰.

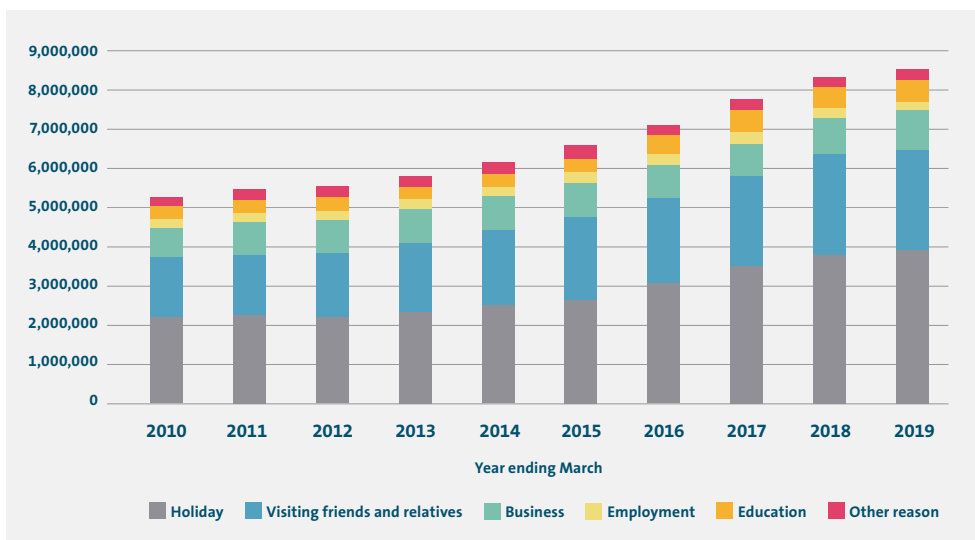
International cultural visitors spent \$28.4 billion in the year to March 2019, making up 64% of the \$44.3 billion spent in Australia by all international tourists¹¹.

Growth in international cultural visitor spend was 41% over the past 5 years, as compared to 38% growth in spend by international visitors overall¹².

In the year to March 2019, cultural visitors accounted for 53% of Australia's international visitors, but made up 67% of the visitor nights and 64% of the spend¹³.

Cultural visitors come predominantly from the desirable Holiday Makers and Visiting Friends and Relatives segments¹⁴.

Cultural Visitors - Main Reason for Trip



– Total trips have increased by 63%, with the most significant increases in reason for trip being *Holiday* (+73%), *Education* (+68%), and *Visiting friends and relatives* (+60%).

– In the year to March 2019, 75% of international cultural visitors were either holiday makers or visiting friends and relatives.

⁹ IVS, TOURISM RESEARCH AUSTRALIA, 2019.

¹⁰ IVS SUMMARY MARCH 2018, TOURISM RESEARCH AUSTRALIA.

¹¹ IVS, TOURISM RESEARCH AUSTRALIA, 2019.

¹² IBID

¹³ IBID

¹⁴ IBID

Cultural Attractions of Australia Member Organisations

Together the member organisations of **Cultural Attractions of Australia** are a powerhouse of international and domestic visitation.

As an aggregate, they attract more than 24 million visitors annually, of which more than 1 in 5 are travellers from overseas.

Cultural Tourism as a Soft Power Asset

The value of cultural tourism as a tool to forge and strengthen international relationships, cross-cultural understanding and communication is very significant. As stated by the Australia Council for the Arts, '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 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.'¹⁵



IMAGE: QANTAS FOUNDERS MUSEUM.

HARNESSING THE OPPORTUNITY OF CULTURAL TOURISM

Cultural Attractions of Australia fills a significant gap in telling Australia's cultural tourism story. There is no other vehicle for presenting this world-class, iconically Australian range of cultural experiences to both domestic and international audiences.

Cultural Attractions of Australia provides the essential collaborative framework to develop and integrate experiences, coordinate sales and marketing, branding, messaging and service delivery, ensuring the opportunities to leverage shared audiences and grow overall demand, participation and economic impact are not lost.

Benchmarking research¹⁶ suggests that no other major cultural destination has a collective similar to **Cultural Attractions of Australia**, offering premium/luxury cultural tourism product. **Cultural Attractions of Australia** is therefore potentially a game-changer, both internationally and domestically, that will help tug attention away from cultural behemoth attractions and destinations in other competing markets.

Given cultural tourism is a long-staying, high-spending and steadily growing sector of the visitor economy, it is imperative that Australia offers unique experiences that feed the enthusiasms and passions of sophisticated, premium value travellers.

Individually, each member of **Cultural Attractions of Australia** offers great potential to create compelling tourism product to attract and meet the needs of this increasingly important market. However, when this array of experiences is brought together and showcased by the collective, they become a formidable proposition and a cultural beacon for brand Australia.

Collectively government, corporate entities, **Cultural Attractions of Australia** and Australia's rich and diverse cultural attractions can drive the elevation and growth of cultural tourism and the consequent significant economic benefit to Australia, its States and world-class cultural organisations.



OPPOSITE PAGE IMAGE: ADELAIDE OVAL, PHOTO: HIRO ISHINO.

16 SANDWALK PARTNERS BENCHMARKING RESEARCH FOR CULTURAL ATTRactions OF AUSTRALIA STRATEGIC PLAN.



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