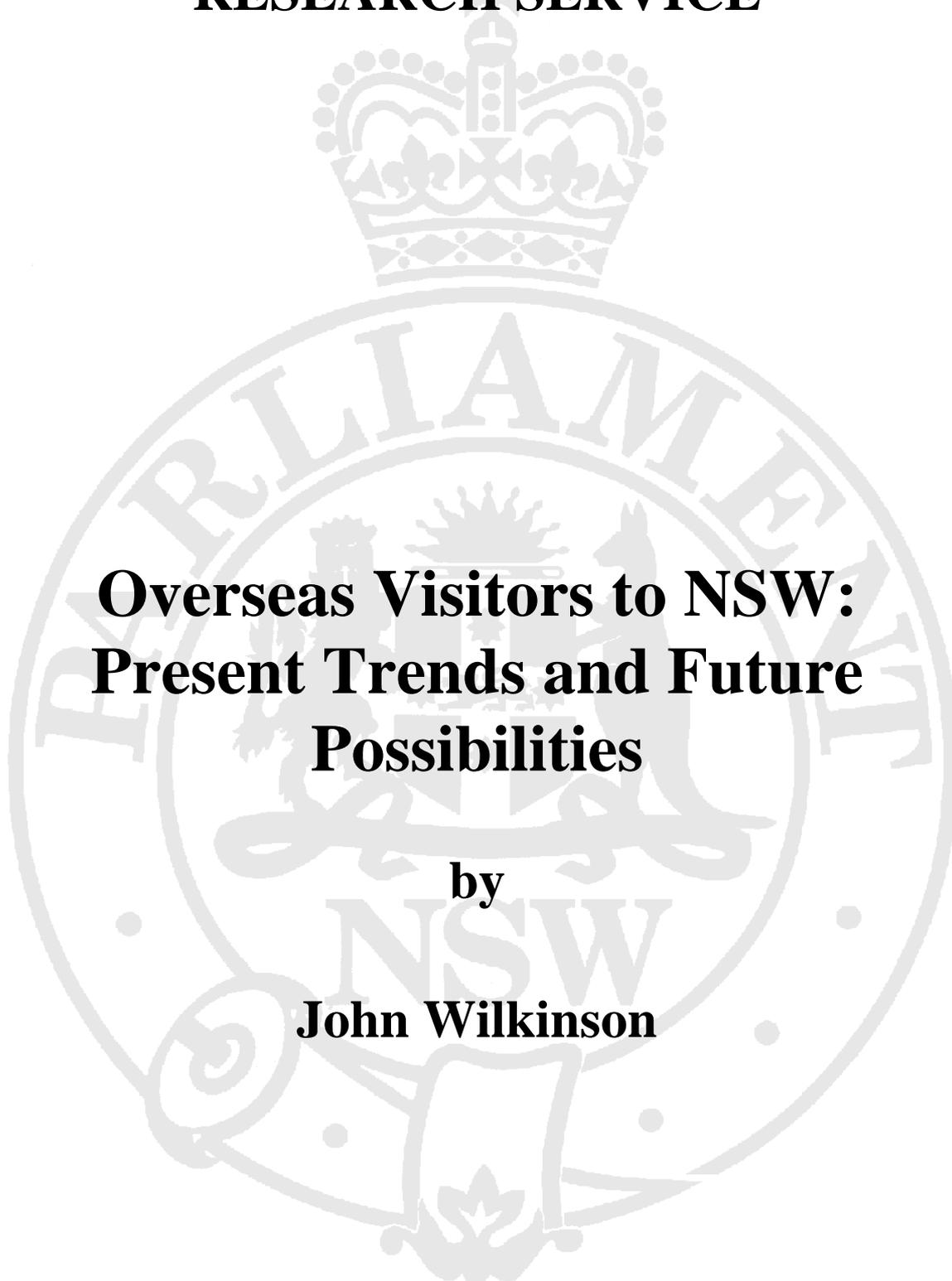


**NSW PARLIAMENTARY LIBRARY
RESEARCH SERVICE**



**Overseas Visitors to NSW:
Present Trends and Future
Possibilities**

by

John Wilkinson

Briefing Paper No 8/99

RELATED PUBLICATIONS

- Tourism in NSW: Possibilities for Rural Regional Areas by John Wilkinson, Briefing Paper No. 19/98

ISSN 1325-5142
ISBN 0 7313 1646 0

April 1999

© 1999

Except to the extent of the uses permitted under the *Copyright Act 1968*, no part of this document may be reproduced or transmitted in any form or by any means including information storage and retrieval systems, with the prior written consent from the Librarian, New South Wales Parliamentary Library, other than by Members of the New South Wales Parliament in the course of their official duties.

**Overseas Visitors to NSW:
Present Trends and Future
Possibilities**

by

John Wilkinson

NSW PARLIAMENTARY LIBRARY RESEARCH SERVICE

Dr David Clune, Manager (02) 9230 2484

Dr Gareth Griffith, Senior Research Officer,
Politics and Government / Law (02) 9230 2356

Ms Rachel Simpson, Research Officer, Law (02) 9230 3085

Mr Stewart Smith, Research Officer, Environment (02) 9230 2798

Ms Marie Swain, Research Officer, Law/Social Issues (02) 9230 2003

Mr John Wilkinson, Research Officer, Economics (02) 9230 2006

Should Members or their staff require further information about this publication please contact the author.

Information about Research Publications can be found on the Internet at:

<http://www.parliament.nsw.gov.au/gi/library/publicn.html>

CONTENTS

EXECUTIVE SUMMARY

1	INTRODUCTION	1
2	TRENDS IN OVERSEAS TRAVELLERS' VISITS TO NSW	1
	(a) International Tourists' Focus on Sydney	1
	(b) Major Sources of Overseas Visitors to New South Wales	2
	(c) The Dominance of Sydney over the Country Regions of NSW	2
	(d) International Tourists' Visits to the Country Regions of NSW	3
3	THE WORTH OF INTERNATIONAL TOURISM	4
	(a) Current Uncertainty over the Role of Tourism in the National Economy	4
	(b) Expenditure by Overseas Tourists in Australia	5
	(c) NSW Share of Overseas Visitors' Expenditure	6
	(d) Employment Created by International Visitation	6
	(e) Overall Anticipated Increases in Tourism Employment	8
	(f) Continued Expansion of Hotel and Motel Building	8
4	FEDERAL AND STATE GOVERNMENT ASSISTANCE FOR REGIONAL TOURISM DEVELOPMENT	9
	(a) Federal Government Assistance	9
	(b) NSW Government Assistance for Regional Tourism Development ..	10
5	OLYMPIC TOURISM	11
	(a) Inbound Visitation Directly Related to the Olympics	11
	(b) Inbound Tourism Associated with the Games	11
	(c) Promotional Strategies Afforded by Games	12
6	AREAS OF TOURIST ACTIVITY WITH POTENTIAL FOR EXPANSION	12
	(a) Increasing the Level of Japanese Visitation	12
	(b) Meetings, Incentives, Conferences, and Events (MICE)	14
	(c) Backpackers	20
	(d) Agri-Tourism	25
	(e) Aboriginal Culture and History	27
	(f) Wine Tourism	32
	(g) The Promotion Potential of Identifiably Australian Film/Television Locations	33
7	CONCLUSION	34

EXECUTIVE SUMMARY

- ▶ Sydney is the pre-eminent destination for overseas travellers visiting NSW (pp.1-2)
- ▶ Amongst those visitors to New South Wales, who come from overseas, the greatest number come from Japan (p.2)
- ▶ Only a relatively small number of overseas visitors travel to the rural regions of the state (pp.2-4)
- ▶ Expenditure by overseas visitors contributes significantly to the state (pp.5-8)
- ▶ Both the federal and state governments provide assistance to promote tourism in the rural regions of NSW (pp.9-10)
- ▶ The 2000 Olympic Games will provide a temporary boost to overseas tourist arrivals (pp.11-12)
- ▶ Some areas of tourist activity, capable of attracting greater tourist numbers, are outlined (pp.12-33)

1 INTRODUCTION

In 1998 the research service produced the briefing note *Tourism in NSW: Possibilities for Rural Regional Areas*. This paper dealt, essentially, with domestic tourists' visits to the country regions of the state. As an accompaniment to this report, the research service is now issuing the following briefing note dealing with international tourists' visits to NSW.

2 TRENDS IN OVERSEAS TRAVELLERS' VISITS TO NSW

(a) International Tourists' Focus on Sydney

Visitors from overseas, travelling to NSW, tend to focus principally on Sydney. In 1989, for instance, 66% of overseas visitors, coming to Australia as a whole, visited Sydney.¹

During the 1990s, this trend has tended to continue, although with Sydney's predominance somewhat declining. The following figures illustrate this:

International Visitors to Australia: 1996

1996	4,164,826
------	-----------

International Visitors to Sydney: 1996

1996	2,498,100 (60% of total visits to Australia) ²
------	---

¹ See Peter Brokensha and Hans Guldberg, *Cultural Tourism in Australia*, report prepared for the federal Department of the Arts, Sport, Environment and Territories (Australian Government Publishing Service, Canberra, 1992), p.27.

² NSW Tourism, *International Tourism Trends in New South Wales 1995 - 1996* (NSW Tourism, Sydney, 1997), p.3.

(b) Major Sources of Overseas Visitors to New South Wales

Out of a total of around 2,572,300 overseas visitors to the state, in 1996, the following countries were where the greatest individual numbers, of those tourists, came from:

International Visitors to NSW, 1996: Major Sources of Visitation

Japan	562,400
New Zealand	305,000
USA and Canada	283,800
United Kingdom	239,300
Korea	167,400
Taiwan	120,600
Hong Kong	102,400
Germany	89,000
Indonesia	71,100
Singapore	69,000
Malaysia	48,900 ³

(c) The Dominance of Sydney over the Country Regions of NSW

Sydney is by far the pre-eminent destination for overseas visitors: as far as their travel to New South Wales is concerned. This is illustrated by the following table, which shows the number of inbound travellers arriving in Sydney and other capital cities of Australia, compared, for example, to those arriving at Coolangatta (an entry point for the NSW north coast):

³ Ibid., p.9. For nationwide totals see Australian Bureau of Statistics, *Overseas Arrivals and Departures*, January 1998, ABS Catalogue 3401.0, p.8.

Overseas Passengers Arriving at Australian Airports:

	Year Ending October 1997	Year Ending October 1998
Sydney	6,832,283	6,899,865
Melbourne	2,356,641	2,454,554
Brisbane	2,291,829	2,253,358
Perth	1,389,862	1,430,430
Adelaide	206,388	220,168
Coolangatta	11,865	15,292 ⁴

(d) International Tourists' Visits to the Country Regions of NSW

As indicated in the above sub-section, overseas visitors to New South Wales have tended to generally remain in Sydney. Traditionally, relatively few overseas visitors travel to the rural regions of the state. The following table illustrates this tendency:

International Visitors to Country NSW (as a %age of national total) :1989

North Coast NSW	6%
Snowy Mountains	2%
Hunter Vinyards	2%
Broken Hill-Silverton	1% ⁵

⁴ Department of Transport and Regional Services, *Air Transport Statistics: International Airlines* (Department of Transport and Regional Services, Canberra, 1998).

⁵ Brokensha, *ibid.*

Again, in the late 1990s, this general tendency continues as before. According to figures provided by NSW Tourism, the following numbers of international tourists came to the rural regions of the state during 1996:

International Visitors to Country NSW: 1996
As Number Totals and as %ages (approx.) of Total International Visitors to NSW

Upper North Coast	127,800	.....	(5%)
New England	29,600	.....	(1%)
Mid North Coast	67,400	.....	(3%)
Lower North Coast	62,800	.....	(2%)
Orana	25,300	.....	(1%)
Far Western	13,800	.....	(1%)
Central West	22,200	.....	(1%)
Riverina	23,000	.....	(1%)
Southern Tablelands	10,600	.....	(½%)
Snowy Mountains	21,500	.....	(1%)
South Coast	29,600	.....	(1%)
Murray	28,400	.....	(1%) ⁶

3 THE WORTH OF INTERNATIONAL TOURISM

(a) Current Uncertainty over the Role of Tourism in the National Economy

Measurement of the nature and significance of tourism's overall contribution to the national economy is currently hindered by the lack of a tourism satellite account within the main system of national accounts used by the Australian Bureau of Statistics. This is because visitors consume many commodities - not just one particular kind - and they partake of a

⁶ *International Tourism Trends in New South Wales*, p.79.

variety of economic activities. Tourism, consequently, has not been recognised as an industry in the usual accounting framework.

At the moment, however, the Federal Government is funding the development of an Australian Tourism Satellite Account (ATSA). The cost of this undertaking is around \$920,000. Additional funding of about \$100,000, a year, will be needed to update the account and a further \$300,000 to update the survey data. When completed the ATSA will provide a more credible measure of tourism's role in the economy. It will enable tourism to be compared with other major industries in terms of size, economic performance and contribution to Gross Domestic Product.⁷

(b) Expenditure by Overseas Tourists in Australia

According to Daniel O'Dea, writing for the Bureau of Tourism Research, during 1995-1996 the total amount of expenditure attributable to overseas visitors, on a national level, was \$13.8 billion. The main areas of expenditure were as follows:

Overseas Visitors Expenditure in Australia, 1995-1996: Main Items

International Airfares (Pre-paid or Purchased in Australia)	\$3.3 billion
Accommodation including Meals	\$2.8 billion
Shopping	\$1.9 billion
Foreign Students' Spending on Goods and Services	\$1.5 billion
Education Fees	\$1.2 billion ⁸

⁷ Details, regarding the Federal Government's initiative on the Tourism Satellite Account, supplied by Peter Wirne, Forecasting and Statistics Section, Office of National Tourism, Department of Industry, Science and Resources.

⁸ Daniel O'Dea, *Tourism's Direct Economic Contribution 1995-1996*, research paper no.3 (Bureau of Tourism Research, Canberra, 1997), p.4.

(c) NSW Share of Overseas Visitors' Expenditure

During 1996, according to a report by Tourism Training NSW, the state's own share of the above national expenditure, by overseas visitors, was \$5.3 billion: presumably spent in the same areas mentioned above (international airfares; accommodation and meals; shopping; foreign students' spending on goods and services; and education fees).⁹

(d) Employment Created by International Visitation

As well as compiling figures in overseas visitors' expenditure in Australia overall, O'Dea has compiled corresponding figures for employment generated by inbound visitors:

⁹ Tourism Training NSW, *1999 - 2001 Tourism and Hospitality Industry Plan* (Tourism Training NSW, Sydney, 1998), p.39.

Jobs Attributable to Overseas Visitors' Expenditure 1995-1996

	NSW	Australia-Wide
Restaurants, Hotels, Clubs	19,300	54,300
Education, Libraries	9,000	27,600
Retail Trade	8,200	23,900
Air Transport	6,200	15,100
Personal Services	3,100	9,600
Health	2,100	6,300
Road Transport	2,000	6,000
Services to Transport	1,800	6,600
Entertainment	1,200	3,800
Wholesale Trade	1,200	3,500
Clothing	1,200	3,300
Communication	600	1,800
Rail Transport	400	1,100
Meat Products	400	1,000
Bread, Cakes and Biscuits	300	1,100
Mechanical Repairs	300	900
Publishing and Printing	300	800
Business Services	200	700
Household Appliances	200	600
Other Industries	1,100	3,300

TOTAL	59,400	171,300¹⁰
--------------	---------------	-----------------------------

¹⁰ O'Dea, op.cit., p.19.

(e) Overall Anticipated Increases in Tourism Employment

More than just providing employment at present, tourism is expected to provide further employment in the years ahead. Tourism Training NSW has estimated that - whereas the total number of overseas visitors, in 1996, amounted to nearly 4,200,000 - by 2001 the annual intake of overseas visitors should reach nearly 4,900,000. This would necessitate the estimated construction of another 5,000 hotel rooms.¹¹

(f) Continued Expansion of Hotel and Motel Building

In the sector which provides the best indicator in the tourism area - hotel and motel construction - there has been a decided expansion over the last five years. The Office of National Tourism has provided the following figures on hotel and motel building throughout Australia:

*Value of Work Undertaken in Hotel and Motel Building Australia-Wide,
1993-94 to 1997-98*

1993-94	\$291 million
1994-95	\$481 million
1995-96	\$638 million
1996-97	\$1 billion
1997-98	\$1.05 billion ¹²

¹¹ Tourism Training NSW, op.cit., p.6.

¹² Office of National Tourism, *Impact*, March 1999 (Office of National Tourism, Department of Industry, Science and Resources, Canberra).

4 FEDERAL AND STATE GOVERNMENT ASSISTANCE FOR REGIONAL TOURISM DEVELOPMENT

(a) Federal Government Assistance

In August 1998, Alex Somlyay, Minister for Regional Development in the Howard Government, announced the inauguration of a regional tourism programme: consisting of cash grants for projects that would enhance the ability of regional areas to attract more visitors. The programme was made up of two strands:

- ▶ cash grants to be provided to organisations, to help them develop high quality tourist facilities or attractions, or for industry development projects contributing to undertakings that enhance business management or language development skills.
- ▶ a limited number of “product development” grants to be made available to enable regionally based people with tourism expertise to travel overseas to develop business skills by learning from the tourism industry of other countries.

Under the regional tourism programme, \$2 million in grants will be provided each financial year, over the four years up to financial year 2001-02.¹³ The following types of organisation are eligible to apply for regional tourism programme funding:

- ▶ state or territory government instrumentality (including a tourism agency)
- ▶ regional tourism authority
- ▶ local government body
- ▶ regional development organisation
- ▶ non-profit organisation
- ▶ local or regionally-based tourism business
- ▶ peak and/or national tourism industry association
- ▶ educational institution

¹³

Press Release, Minister for Regional Development, 26 August 1998.

- ▶ partnership between an eligible organisation and a business entity¹⁴

(b) NSW Government Assistance for Regional Tourism Development

Through the Minister for Tourism, Bob Debus, the Carr Government, during its 1995-1999 term in office, has increased total funding for regional tourism to around \$7 million a year. This funding supports a network of regional tourist organisations (RTOs) which market regional attractions and develop the local tourist industry.¹⁵ Between financial years 1995/96 and 1998/99 (to date), an allocation of over \$11 million (or around \$2¾ million each year) has been directly provided for marketing regional tourism. The total amount of funding received, by each of the RTOs during 1995-1999, has been as follows:

***Funding Received by RTOs in Rural Regional NSW
(incl. Contributions from Businesses): 1995-1999***

Northern Rivers Tropical RTO	\$1,572,636
Big Sky Country RTO (New England region)	\$580,422
Living Outback RTO (Bourke-Balranald region)	\$632,822
Holiday Coast RTO (Coffs Harbour region)	\$1,510,599
Mid North Coast RTO	\$996,967
Explorer Country RTO (Bathurst-Dubbo region)	\$515,312
Capital Country RTO (Goulburn-Yass region)	\$337,325
Riverina RTO	\$461,714
Snowy Mountains RTO	\$2,424,487
South Coast RTO	\$1,072,065
Murray RTO	\$612,175 ¹⁶

¹⁴ Office of National Tourism, Tourism Facts, *Regional Tourism Programme 1998-99* (Office of National Tourism, Department of Industry, Science and Tourism, Canberra, 1998).

¹⁵ NSW ALP election policy statement on tourism, 1999, p.3.

¹⁶ Figures provided by Tourism NSW.

5 OLYMPIC TOURISM

(a) Inbound Visitation Directly Related to the Olympics

Olympic Athletes and Officials

Forecasts of increased overseas visitor numbers to New South Wales, as a result of the 2000 Olympic Games, are inevitably focused on the estimated number of inbound visitors who might come to Sydney because of the Games. A fairly precise calculation, however, can be provided in one particular area: that is, in the case of athletes and Games officials, since the national teams and their entourages are already known. The seating capacity of the Olympic Stadium is likewise already known, as is the capacity of the various other venues to be used for the events. The Tourism Forecasting Council, in its forecasting report *The Olympic Effect*, has predicted that “some 132,000 international visitors will come to Australia as athletes, officials, judges, journalists or spectators.”¹⁷

(b) Inbound Tourism Associated with the Games

As well as producing estimates of the numbers of inbound visitors who are directly connected with the staging of the 2000 Olympics, the Tourism Forecasting Council has produced estimates of the numbers of overseas visitors who will come to New South Wales simply as a result of being attracted by the fact that the Games are being held there. The Council’s estimates are prefaced by three scenarios, outlined as follows, on the basis of which a general forecast is made:

1. *Possible Scenarios in which Olympic Visitation Might Eventuate*

- | | |
|------------|--|
| Scenario 1 | The Games will produce long-term promotional benefits for Australia in general. Switching effects, in which people change either the time of their visit or the destination visited as a result of the Games, will be minimal relative to the promotional impacts in 2001, while the effect of pre/post itineraries associated with the Games will contribute to growth in visitor numbers throughout Australia. |
| Scenario 2 | The Games will produce long-term benefits to Australia as a whole, without significant time switching effects. . . The effect of pre/post itineraries will be that inbound travel directly attributable to the Games will see growth in Sydney occurring at the expense of other destinations. |
| Scenario 3 | The Games will have no longer term promotional impact beyond the additional visitors generated by the event itself. These additional |

¹⁷ Tourism Forecasting Council, *The Olympic Effect* (Tourism Forecasting Council, Canberra, 1998), p.13.

visitors will be primarily focused on the Games and not inclined to engage in pre/post Games travel beyond Sydney. The tourism benefits of the Games therefore will be limited to the direct impact of visitors attracted to Sydney for the event in 2000.

2. *Estimates of Visitation on the Basis of the Most Likely Scenario*

The Tourism Forecasting Council has projected estimates of inbound tourists emerging from each of the three above scenarios, together with its own choice of the most likely scenario, as follows:

The wider promotional impacts under scenarios 1 and 2, together with direct Olympic visitation, indicate an increment of 76,000 visitors to Australia in 1998, peaking at 350,000 visitors in 2002 and gradually decreasing to a nil impact by 2005. The difference between scenarios 1 and 2 is that Olympics-specific visitors will extend their travel itineraries to include other Australian States/Territories in scenario 1, whereas in scenario 2 they will visit New South Wales only. Scenario 3 involves a peak increment of approximately 1 110,000 international visitors to Australia in 2000, with New South Wales being the sole beneficiary. . . Scenario 2 for. . . the international. . . tourism market. . . is considered to be the most likely scenario of the tourism impacts of the Sydney 2000 Games.¹⁸

(c) **Promotional Strategies Afforded by Games**

As well as providing an opportunity, on an immediate level, to bring additional overseas visitors to New South Wales, the 2000 Olympic Games offers the possibility of strategies that may contribute to the long-range expansion of the numbers of inbound tourists. One such strategy is the Visiting Journalists Programme operated by the Australian Tourism Commission (ATC). According to a recent report by Fiona Green, of Warburg Dillon Read, "Through the Visiting Journalists Programme, the ATC brought 1,040 print and broadcast media to Australia in 1997/98 generating \$550 million in coverage seen by over 1 billion people."¹⁹ One instance of the activities of this programme, is assistance provided to Japanese television shows to feature items about Australia.

6 **AREAS OF TOURIST ACTIVITY WITH POTENTIAL FOR EXPANSION**

(a) **Increasing the Level of Japanese Visitation**

Although there has been a recent decline in the number of Japanese tourists coming to Australia, the Australian Tourist Commission, and other government bodies, have been

¹⁸ *The Olympic Effect*, pp.13,16-19.

¹⁹ Fiona Green, *Tourism Growth after the Sydney 2000 Olympic Games* (Warburg Dillon Read, Sydney, 1999), p.9.

endeavouring to achieve an increase in Japanese visitation. Until the early 1990s, the number of Japanese tourists travelling to Australia had been steadily increasing. In financial year 1993-1994 the number of Japanese people travelling to Australia peaked at 5.2% of all Japanese tourists journeying overseas. By 1996, Australia's share had dropped to 4.64%.²⁰ Part of the problem is strong competition from the USA, as illustrated by the following figures:

Japanese Tourists: Overseas Travel Destinations, by Visitor Numbers, in 1997

USA (mainland)	2,191,625
USA (Hawaii)	2,072,000
Korea	1,676,072
China	1,582,000
Guam	1,560,894
Hong Kong	1,368,988
Singapore	1,092,055
Thailand	965,454
Taiwan	908,074
Australia	813,892 ²¹

In January 1997 the Australian Tourism Commission convened a conference to address this decline. A consideration, which seemed to emerge at the conference deliberations, was the apparent fact that relatively few Japanese travellers make repeat journeys to Australia. To address this situation, an ongoing programme of action was inaugurated. Fresh marketing initiatives were undertaken, and the minimum tour price (a price which is formally approved by the Japanese government for packaged holidays in Australia) has been

²⁰ QANTAS, submission to the Senate Standing Committee on Foreign Affairs, Defence and Trade, *Inquiry into Japan*, 1999.

²¹ Australian Tourist Commission, submission to the Senate Standing Committee on Foreign Affairs, Defence and Trade, *Inquiry into Japan*, 1999.

reduced.²²

Unfortunately, however, by 1998 the recession in Japan was having a definite impact on business activity: including tourism. In February 1998, Jetour (one of the top five Japanese wholesale travel companies) declared itself bankrupt.²³ Overall there was an estimated 8% fall in the number of Japanese visitors to Australia, during 1998: the total number of arrivals only reaching 751,000.²⁴

(b) Meetings, Incentives, Conferences, and Events (MICE)

According to a report on cultural tourism in Australia - prepared by the federal Department of Communications, Information Technology and the Arts - in 1997, "112,644 international visitors to Australia attended conference and conventions. This represents a market growth of 250 per cent over the last five years, making it the fastest growing sector of the Australian tourism industry." Not only is the meetings, incentives, conferences, and events (MICE) sector the most rapidly expanding area of the industry, but the amount spent by visitors, at conferences and the like, is significantly greater than that spent in other areas. According to the federal department of the arts, the Sydney Conventions and Visitors Bureau has estimated that in 1997 international delegates to conferences spent "a remarkable \$770 [per day] while in Sydney or \$5,722 for their entire stay, based on average stay of 6.8 nights. This expenditure of \$770 per day is nine times the average expenditure for international visitors of \$85 per day."²⁵

The number of international meetings being held in Sydney, in particular, has increased significantly. In 1998 the Amsterdam-based International Congress and Convention Association nominated Sydney as the foremost convention city, world-wide. According to Pam Kershaw, "Sydney's ranking as the world's number one convention city is based on the 50,313 delegates who attended international conferences here in 1997, an achievement well ahead of Barcelona (43,636 delegates) and London (41,104).²⁶ The following figures, provided by the International Congress and Conventions Association, illustrate Sydney's prominence as a convention centre, within Australia:

²² QANTAS, op.cit.

²³ Ibid.

²⁴ Australian Bureau of Statistics, *Overseas Arrivals and Departures*, January 1999, ABS Catalogue 3401.0, p.8; Christopher Dore, "Crisis-Hit Asians Stay at Home in Doves" in *The Australian*, 24 February 1999, p.5.

²⁵ Penelope Coombes, The People for Spaces and Places and Janet Millar, *Cultural Tourism in Australia* (Department of Communications, Information Technology and the Arts, Canberra, 1999), p.5.

²⁶ See Pam Kershaw, "Convention City" in the *Sydney Morning Herald*, 20 April 1999, p.18.

International Meetings: 1995-1997

	Sydney	Australia
1995	27	75
1996	30	114
1997	44	118 ²⁷

Sydney's major competitor, in the international meetings sector, is Melbourne. While hosting fewer conferences than Melbourne, during financial year 1996-1997, Sydney's conferences are larger and appear to produce more revenue. The Melbourne Convention and Marketing Bureau have supplied the following statistics which illustrate this:

Conference Attendance and Expenditure, Sydney v. Melbourne: 1996-1997

	Sydney	Melbourne
Conferences	34	63
Delegates	71,100	54,573
Room Nights	329,350	212,908
Revenue	\$205,000,000	\$56,970,723 ²⁸

An important contributor, to the attraction of conferences to Sydney, is the Sydney Conventions and Visitors Bureau. The SCVB is a body jointly funded by the NSW government and the tourist industry. The following are instances of rotating world conferences, won for Sydney by the SCVB:

²⁷ Fact Sheets on the MICE Industry (Sydney Convention and Visitors Bureau, Sydney, 1999), p.3.

²⁸ Marlyn Cunnington, Michel Couturier and Karen Smith, *1998 Market Brief Seminar* (Sydney Convention and Visitors Bureau, Sydney, 1998), p.12.

Selection of International Conferences Held in Sydney (won by the SCVB): 1998

Conference	Venue	Number of Delegates
6th Annual Scientific Meeting of the International Society for Magnetic Resonance in Medicine	Sydney Convention and Exhibition Centre, Darling Harbour	2,000
13th World Congress of the International Union of Phlebology	Sydney Convention and Exhibition Centre, Darling Harbour	1,500
IEEE Globecom Conference	Sydney Convention and Exhibition Centre, Darling Harbour	1,500
World Association of Buiatrics Congress	Sydney Convention and Exhibition Centre, Darling Harbour	1,000
International Federation of Freight Forwarders' Associations	Sydney Convention and Exhibition Centre, Darling Harbour	1,000
8th ACI (Airports Council International) World Assembly and Conference	Sydney Convention and Exhibition Centre, Darling Harbour	1,000
11th Asia-Pacific Regional Conference of the International Water Supply Association	Landmark Parkroyal Hotel	800
34th Annual Seminar of the International Insurance Society	Regent Hotel	600
Annual Conference of the International Association of Young Lawyers	Regent Hotel	600
7th International Conference on Surgery of the Shoulder	Sydney Convention and Exhibition Centre, Darling Harbour	600
7th International Congress on Noise as a Public Health Problem	Sydney Convention and Exhibition Centre, Darling Harbour	600

Sydney's biggest single event is the Sydney Gay and Lesbian Mardi Gras. As well as attracting around 600,000 participants and on-lookers, Professor Ian Marsh, of the Australian Graduate School of Management (University of NSW) has calculated that the Mardi Gras now attracts around 5,000 overseas visitors. He has shown the increase in overseas visitors to the Mardi Gras, during the 1990s, as follows:

Sydney Gay and Lesbian Mardi Gras: Overseas Visitors

1993	1998
2,158	5,190 (3,633 arriving specifically for Mardi Gras) ²⁹

Visitors to the Mardi Gras spent a significant amount of time and money, during their stay in Sydney:

Overseas Visitors to the Sydney Mardi Gras: 1998

Length of Stay	21.5 days
Average Daily Expenditure	\$347.25
TOTAL (for 3,633 Mardi Gras-specific overseas visitors)	\$27,123,233 ³⁰

In 1996, Tourism NSW created a special events unit to identify, and provide support for the staging of, major international events. The unit partly operates through a major events committee. This committee is chaired by Tourism NSW and incorporates peak representation of the Premier's Department, the Ministry for Arts, the Department of State and Regional Development, the Department of Sport and Recreation and the Department of Gaming and Racing. Under this programme, Tourism NSW has supported the following major events during 1997-1998:

²⁹ Ian Marsh and Sam Levy, *Sydney Gay and Lesbian Mardi Gras: Economic Impact Statement 1998* (Sydney Gay and Lesbian Mardi Gras Ltd., Sydney, 1998), p.5; Lisa Southgate, "Is Sydney over the Mardi Gras?" in *The Australian*, 16 March 1999, p.21.

³⁰ Marsh and Levy, op.cit., p.8.

Major Events Supported by Tourism NSW: 1997 - 1998

Australian Grand Sumo Tournaments	1997
World Oceanman Series Final	1997
Commonwealth Bank Cycling Classic	1997
Telstra Smart Champions Tennis Tour	1997
Whitbread Round the World Yacht Race Stopover/ Tall Ships Visit	1997 - 1998
Blue Mountains Fine Food Festival	1998
Sydney Shines in Winter Race Day	1998
International Biennale of Sydney	1998
Greg Norman Holden International Golf Tournament	1998
Tour de Snowy Women's Cycling International	1998
Mercedes Australian Fashion Week	1998
"Showboat" and "Boy from Oz" Theatre Seasons	1998
Bledisloe Cup	1998 - 2005 ³¹

During the period 1999 to 2000, Tourism New South Wales, via its special events unit, will have provided (or will subsequently provide) its support to the following major events:

³¹ Tourism NSW, *Chairman's Report to the Minister for Tourism: Activities and Achievements of Tourism New South Wales 1995 - 1998* (Tourism NSW, Sydney, 1999), pp.6-7.

Major Events to be Supported by Tourism NSW: 1999 - 2000

Australian Springtime Flora Festival	1999
City of Grafton Head of the River Regatta	1999
FAI Cup Baseball Finals Series	1999
World Fly Fishing Championships	1999
World Championship of Marching Show Bands	1999
World and Australian Longtrack Speedway Grand Prix	1999 and 2000
Sydney Festival	1999 and 2000
Greg Norman Holden International Golf Tournament	1999
Tour de Snowy Women's International Cycling	1999
Rugby League Anzac Test	1999
Mercedes Australian Fashion Week	1999
Sydney Food and Wine Festival	1999
Rugby Union Centenary Test	1999
American Football Tournament	1999
Pan Pacific Swimming Championships	1999
Bledisloe Cup Rugby Union Test	1999
Tourism NSW Metropolitan Cup Race Day	1999
Millennium New Year's Eve Celebrations	1999-2000
IASF World Youth Sailing Championships	2000
World Lifesaving Championships	2000
Pacific Schools Games	2000
Gay Games	2002
Rugby World Cup	2003 ³²

(c) Backpackers

Backpackers have become an ever increasing segment amongst the total numbers of overseas visitors coming to New South Wales. Of particular significance for the state is that the highest percentage of backpackers, who come to Australia, come to NSW (amongst the other states they visit). This is demonstrated by the figures for the number of nights spent, by backpackers, in each of the states and territories, between 1997 and 1998:

Backpacker Visitor Nights, Sept. 1997 - Sept. 1998: By State and Territory

New South Wales	9,124,000 (38% of total)
Queensland	6,444,000 (27%)
Victoria	2,910,000 (12%)
Western Australia	2,550,000 (11%)
Northern Territory	1,385,000 (6%)
South Australia	1,120,000 (5%)
Tasmania	373,000 (2%)
Australian Capital Territory	209,000 (1%) ³³

Backpackers are a significant segment of overseas visitors to New South Wales, and to Australia generally, because, on average, each backpacker spends around 83 days in Australia (or nearly three months). Backpackers spend a considerable sum of money in Australia, accounting for almost 13% of direct visitor expenditure in Australia during 1995-1996. Total expenditure has been calculated as follows:

³³ Table 17, "Backpacker Visitor Nights in Each State and Territory" in *International Visitor Survey*, September Quarter 1998.

Backpackers' Estimated Expenditure 1995-1996

Australia	New South Wales
\$884 million	\$350 million (estimated) ³⁴

The above amount of money was spent on the following items:

Backpackers Average Per-Person Expenditure within Australia: 1995-1996

Food, Shopping, Phone Calls etc.	\$1,411
Accommodation	\$1,134
Entertainment	\$1,078
Transport	\$849 ³⁵

As regards country of origin, the greatest numbers of backpacker visitors, from any one individual country, come from Britain. The essential statistics for nation of origin are as follows:

³⁴ Ian Buchanan and Allison Rosetto, *With My Swag upon My Shoulder: A Comprehensive Study of International Backpackers to Australia*, occasional paper no.24 (Bureau of Tourism Research, Canberra, 1997), pp.1-3,16. See also table of backpacker visitor nights, by state and territory, above. This approximate figure is derived by dividing total backpacker expenditure in Australia (\$884 million) by the total number of backpacker visitor nights spent in Australia (for single visitor night expenditure) and then multiplying this figure by the number of backpacker visitor nights spent in New South Wales.

³⁵ *Ibid.*, p.30.

Backpacker Visitors to Australia, by Country of Origin: 1995-1996

Britain	20 %
Europe (excluding Britain, Germany and Scandinavia)	18%
USA and Canada	14%
Germany	11%
Asia (excluding Japan)	10%
Japan	7%
Scandinavia	7%
New Zealand	6% ³⁶

In particular, backpackers are more likely to undertake recreational activities which would draw them towards the regional areas of New South Wales. Ian Buchanan and Allison Rosetto have tabulated the participation rates of backpackers in recreational activities (based on interviews) as follows:

³⁶ *Ibid.*, p.4.

*Recreational Activities Pursued by Backpackers: 1995-1996
Percentages from Sample Interviews*

Swimming or Diving	82%
Bushwalking	72%
Snorkelling	55%
Outback Safari	37%
Scuba Diving	36%
Rock Climbing/Mountain Climbing	33%
Sailing/Yachting/Sailboarding	31%
Whale Watching/Dolphin Watching	28%
Surfing	22%
Canoeing/Kayaking	17%
Horse Riding/Horse Racing	17%
Tennis/Squash	15%
Golf/Cricket/Football	14%
White Water Rafting	11%
Game Fishing/Deep Sea Fishing/Angling	11%
Other Water Sports	10%
Aerobics/Gymnasium Activities	9%
Bungy Jumping	8%
Gold Panning/Gemstone Fossicking	7%
Water Skiing	6%
Hang Gliding/Parasailing/Parachuting/Gliding	5%
Snow Skiing	3% ³⁷

One example of growth, in the number of overseas tourists travelling to the regional areas of New South Wales, is that of the increase in the number of overseas visitors coming to Cape Byron, shown by the following figures:

³⁷ *Ibid.*, p.28.

Overseas Visitors to Cape Byron: As a Percentage of Total Visitors

1993	1997
17%	30% ³⁸

With the total number of visitors to Cape Byron, in 1997, being estimated at around 342,000, it seems that about 102,500 of these visitors were overseas visitors.

Other regional areas of NSW are beginning to benefit from the activities of backpackers, because certain travel companies, targeting backpackers, are routing their tours through rural New South Wales. The Oz Experience company, established in 1991 and specifically focused on backpackers, features three rural NSW stopovers on its Sydney to Cairns tours: Nundle on the first night; Bingara on the second; and Byron Bay on the third.³⁹ Since, in 1998, there were 8,180 backpackers who took the Oz Experience Sydney to Cairns tour, nearly 5,000 more than in 1995, there appear to be potential gains, for rural areas, in the expansion of backpacker tourism.

Backpacker Travellers on the Oz Experience Sydney-Cairns Tour via Nundle, Bingara and Byron Bay

1993	1998
3,340	8,180 ⁴⁰

Recently, two new business undertakings have been commenced in Newcastle, similarly focusing on the backpacker sector. In addition to the already existing Newcastle Backpackers hostel, a new Newcastle YHA has been opened (with a total of 90 beds) and another concern, Backpackers by the Beach (with 32 beds) has also been established.⁴¹

³⁸ Graham Brown and Harjap Bassan, *Cape Byron State Recreation Area: Visitor Survey*, a study conducted for the Cape Byron Trust (School of Tourism and Hospitality Management, Southern Cross University, Lismore, 1998), p.10.

³⁹ Oz Experience, *Transport Network Guide*, 1998.

⁴⁰ Information supplied by Oz Experience.

⁴¹ Jane Worthington, "Packing then In" in the *Newcastle Herald*, 17 April 1999, weekend feature, pp.4-5.

(d) Agri-Tourism

Another area of expansion within inbound tourism is that of agricultural tourism. Agri-tourism has become of particular importance to farmers in light of the downturn in rural production. In looking at the present contribution of “off-farm” income to primary producers, Jelix and Lambert have made the following points:

- ▶ two farms in every five now rely on wage and salary income earned off the farm
- ▶ off farm income is the sole means of many farms remaining viable
- ▶ off farm income accounted for between 37% and 64% of total broadacre farm family incomes during the three years from 1993/4 to 1995/6⁴²

Stuart Allardyce, of Australian Agritours (a subsidiary of Australian New Frontiers), has defined agri-tourism as consisting of three main areas of activity:

- ▶ Technical and Study Tours
- ▶ Regional Conferencing centering on Agriculture
- ▶ Farm Stays⁴³

One example of rural technical and study tours in New South Wales is provided by the town of Leeton which, having already been established as the centre of the rice growing industry in NSW, is now hosting visits from tourists (principally from Japan) who want to examine the nature and operations of rice-growing in the state. The expansion of agri-tours in the Leeton area is illustrated by the following figures:

⁴² J. Jelix and J. Lambert, *Missed Opportunities: Harnessing the Skills of Rural Women for Economic, Environmental and Social Change* (Rural Industries Research and Development Corporation) cited in *Farm Tourism Development Plan: South Central Region of South Australia*, report prepared by Advance Tourism (Melbourne, 1998), p.4.

⁴³ Stuart Allardyce, “Developing Agritourism”, paper presented at the *NSW Tourism Conference*, Dubbo, 4 - 6 November 1998.

Overseas Tourist Group Visits to the Leeton Rice-Growing Area: 1990s

Early 1990s	1996
7	200

Gus Dalitz, the tourism manager of the Leeton Visitors' Centre, was quoted in early 1996 as saying that the average stay for Japanese visitors was around two nights and that, during 1996, close to 3,000 Japanese visitors. . .[were] expected to be handled by the visitors' centre. He added that "A lot of tours leave Japan and their destination is Leeton. If they go to the Gold Coast, Melbourne or Sydney it's an add-on".⁴⁴

An instance of regional conferencing centering on agriculture is Australian Agritours' staging of the World Shorthorn Congress, in June 1998. As described by Allardyce, whose company organised and managed the conference,

This conference rather than coming to one point spent two days in Sydney, then travelled to Wagga Wagga, then on to Dubbo for four days and then to Armidale where the main part of the conference was held. After the conference a number [of participants] took post conference tours to other areas of NSW. . .This conference and pre and post conference tours had a total expenditure exceeding \$250,000. This does not include airfare to and from Australia.⁴⁵

Farm stays have also developed, to become a substantial sub-sector of agri-tourism. Australian primary producers first began hosting tourists, on their properties, in the early 1960s. In 1983, one of the operators in this area, Australian Farm Host Holidays, established a national individual traveller farmstay network. By financial year 1989-1990, the expenditure derived from farm and country tourism was estimated to be around \$300 million.⁴⁶ By the early 1990s there were over 1,000 properties, throughout Australia, offering farm stay holidays. The number of properties in each state, offering such holidays, were as follows:

⁴⁴ Christine Thomas, "Asian Tourist Boom for MIA" in the *Daily Advertiser*, 31 January 1996, p.1.

⁴⁵ Allardyce, *ibid.*

⁴⁶ Synapse, *Farm and Country Tourism Industry Workshop 1992*, report (Synapse Agricultural and Resource Consulting, Brisbane, 1992), p.i.

Properties Offering Farm Stay Holidays: 1992 (approx.)

New South Wales	500
Victoria	500
Tasmania	300
Western Australia	100
Queensland	80
South Australia	80
Northern Territory	15 ⁴⁷

The important aspect of farm-stays is that many are solely marketed to overseas visitors. According to Chris Fletcher, writing in 1999, in *The Land*, “There are [now] approximately 600 holiday farms in NSW, with about 100 servicing inbound visitors.” Neville Lowe, the managing director of Australian Farmhost Holidays, has remarked that, “Growth in the inbound agri-tourism market has averaged 20pc annually during the past five years.”⁴⁸ In 1994, for example, Australian Farm Host Holidays created an “English on the Farmstay” package. In this particular item, farmstay hosts undertook to make special efforts to assist their guests in improving their English. This package was sold through English language schools in Tokyo, Osaka, Nagoya and Seoul.⁴⁹

(e) **Aboriginal Culture and History**

Another area of overseas visitation, which holds potential for expansion, is that of Aboriginal culture and history. According to *The Australian*, at the world’s largest travel fair (the Internationale Touristmus Borse), held in Berlin in March 1999,

An Alice Springs-based operator rounded off a week thick with interest in indigenous tourism at ITB (Internationale Touristmus Borse), by scooping a top award for socially responsible tourism. . . The Pwerte Marnte Marnte Aboriginal Corp, which operates the Aboriginal Art and Culture, and the Aboriginal Desert Discovery Tours beat entries from 26 countries. . .⁵⁰

⁴⁷ Claire Holsinger, “Farm Stay Tourism in Perspective” in *ibid.*

⁴⁸ Chris Fletcher, “Ag-Tourism Brings in the Big Bucks” in *The Land*, 28 January 1999, p.26.

⁴⁹ Information provided by Australian Farm Host Holidays.

⁵⁰ Lisa Southgate, “Tourism Flaunts Magnets” in *The Australian*, 11 March 1999, p.26.

The managing director of the Australian Tourist Commission, John Morse, speaking from the Internationale Touristmus Borse, added that,

There's big interest in Aboriginal tourism over here, from the Germans and other European delegates - it's huge. . .My view is that Aboriginal culture could play a huge part in Australia. The industry is very young in Australia at this stage. . . nobody would pretend the market is going to be easy, but it will certainly be rewarding.⁵¹

The Australia Council has already sponsored three surveys of overseas tourists' attitudes towards visiting Aboriginal culture and history. These surveys, conducted during the first half of the 1990s, found that visitors from Europe and the USA were those most likely to have an interest in tourism incorporating aspects of Aboriginal culture.⁵²

Audits of Aboriginal sites have, also, already been prepared. Lee and Rosetto have written that, "There were 888 Aboriginal places in the Register of the National Estate as at 30 June 1997. Most of these places encompassed a number of Aboriginal sites. New South Wales, Queensland and South Australia had the largest number of Aboriginal places listed in the National Register. Of the 888 places listed, 207 (23.3 per cent) were art sites. There were also State registers of places".⁵³

Overseas visitors have recently begun to demonstrate a definite interest in visiting Aboriginal sites. Russell Blamey and Deborah Hatch have compiled the following figures on inbound tourists' visits to Aboriginal sites:

⁵¹ Ibid.

⁵² Lee Foo and Allison Rosetto, *Cultural Tourism in Australia: Characteristics and Motivations*, BTR occasional paper no.27 (Bureau of Tourism Research, Canberra, 1998), p.12.

⁵³ Ibid., p.15.

*Numbers of Overseas Tourists Visiting Australian Aboriginal Sites, 1995:
By Country of Origin*

USA and Canada	66,300
Japan	59,900
UK and Ireland	58,400
Europe (outside Germany, Scandinavia and Switzerland)	46,700
Germany	44,300
Asia (outside Japan)	36,500
Scandinavia	14,300
Switzerland	13,800
New Zealand	13,200
Other	10,300 ⁵⁴

NSW Tourism has now begun to embark on an indigenous tourism strategy. In February 1997, under the then Minister for Tourism (Brian Langton), NSW Tourism issued a paper entitled *Indigenous Tourism: Product Development and Principles*. As the document stated, the principles in the paper had “been developed to help guide new and existing operators involved in Aboriginal heritage and cultural tourism” and included the following propositions:

- ▶ when Aboriginal culture is the product, Aboriginal people are best positioned to determine the content and interpretation of the product.
- ▶ Aboriginal culture is a living, dynamic culture: contemporary as well as traditional values and customs need to be acknowledged.
- ▶ to achieve a sustainable and harmonious outcome, Aboriginal heritage and cultural tourism products should always be developed in line with the values of Aboriginal communities.
- ▶ Aboriginal participation, financial equity and approval should help ensure that the integrity and authenticity of the product is maintained, and that Aboriginal culture is accurately interpreted and not misrepresented.

⁵⁴ Russell Blamey and Deborah Hatch, *Profiles and Motivations of Nature-Based Tourists Visiting Australia*, BTR occasional paper no.25 (Bureau of Tourism Research, Canberra, 1998), p.14.

-
- ▶ in the case of joint business initiatives, if the need exists, non-Aboriginal partners are strongly advised to undertake a suitable cross-cultural awareness programme.
 - ▶ tourism has a responsibility to deliver quality of life benefits to the community. It is reasonable to expect that when Aboriginal culture is the tourism product, benefits should be returned to Aboriginal people and the community identified with the product.
 - ▶ the process of Aboriginal tourism product development should occur within the context of a proper understanding of, and compliance with, Aboriginal protocols.
 - ▶ consideration must be given to the traditional Aboriginal “tribal” lands or nation states on which the product or attraction historically stands.
 - ▶ where Aboriginal heritage sites are involved, permission for operators and visitors to see and view the sites should be sought from those at the local level who have cultural authority for that area.
 - ▶ consultation and negotiation should be undertaken with tribal Elders over any other matters which involve, and are of significance to, Aboriginal communities.
 - ▶ consideration should be given to Aboriginal decision making processes, which tend to involve many people.
 - ▶ consideration must be given to the distinctions between “men’s business” and “women’s business”, and men’s sites and women’s sites, and the protocols which need to be respected in relation to each.
 - ▶ keen sensitivity should be shown towards Aboriginal law, customs, beliefs and culture.⁵⁵

Following the publication of the principles, a New South Wales Aboriginal Tourism Cultural Experience Manual was presented at the 1997 Australian Tourism Exchange (ATE). This was the first time that NSW had had an Aboriginal presence at the ATE. An association of Aboriginal Tourism Operators is being formed as well as a New South Wales Aboriginal Tourism Database. NSW Tourism is also developing an Inter-Agency Aboriginal Tourism Forum - involving representatives of government, industry and the community - with the aim of creating an integrated approach to Aboriginal tourism development in New South Wales. Some tourist attractions, emphasising Aboriginal culture and history, are located at the following centres:

- ▶ *Bourke*: Back of Bourke Exhibition Centre. The foundation stone for the centre was laid in December 1997 by the then Federal Minister for Tourism, Andrew Thomson.

⁵⁵ NSW Tourism, *Indigenous Tourism: Product Development Principles* (NSW Tourism, Sydney, 1997), pp.7-9.

The idea behind the centre was that it should be a New South Wales equivalent of Queensland's Longreach Stockman's Hall of Fame. Patrons of the centre include the Deputy Prime Minister, Tim Fischer, and the Premier of NSW, Bob Carr. The centre intends to work with all Aboriginal organisations in the area, to ensure that visitors are exposed to as much of the region's culture and history as possible. Aboriginal organisations to be consulted include those as far away as Walgett, Brewarrina, Lake Mungo, Mount Gundabooka and Thargomindah. In October 1999 the centre will stage a Mateship Festival which will showcase a number of indigenous tourism ideas.⁵⁶

- ▶ *Brewarrina*: Brewarrina Aboriginal Cultural Museum. This museum, situated on an ancient dreaming site, and beside Aboriginal fisheries on the Darling River, offers the opportunity to experience Aboriginal culture first hand. Artefacts, paintings, books and other items are available, for sale, in the museum shop.
- ▶ *Coffs Harbour*: A Natural Adventure. A tourist package, entitled A Natural Adventure, offers tourists the opportunity to participate in an Aboriginal guided tour complete with dance performances, workshops and walks.
- ▶ *Coonabarabran*: Coona Country Tours. Amongst the tours offered by this company are tourist packages providing personalised tours to unique places which reveal Aboriginal culture and history.
- ▶ *Corindi Beach*: Yarrawarra Aboriginal Cultural Centre. This centre focuses on the maintenance of Aboriginal culture and history. It hosts tours, and performances, illustrating Aboriginal culture.
- ▶ *Narooma*: Montague Island Nature Reserve Tours. The NSW National Parks and Wildlife Service conduct tours, of the island, which include mention of the area's Aboriginal history.
- ▶ *Paterson*: Hunter Valley Day Tours. Amongst the tours, offered by this company, are tours of Aboriginal ancient sites (including a visit to cave paintings).
- ▶ *Queanbeyan*: Koori Aboriginal Culture Tours. This company offers a variety of tours which provide the opportunity to visit Aboriginal rock art sites; hear Aboriginal stories; and taste Aboriginal bush foods.
- ▶ *Sydney*: Elite Cruise Company, Aboriginal Heritage Cruise. One of the tours offered by this company (operating from Cabarita) is a tour which offers an opportunity to see the rock engravings of the Eora people (who once lived around the present-day Sydney Harbour).

-
- ▶ *Sydney*: Gavalala Aboriginal Cultural Centre. This centre is Aboriginal owned and operated. It specialises in Aboriginal artefacts, books and other items. Traditional dance performers and artists are also in residence.
 - ▶ *Sydney*: Island Corroboree. This tour package centres on a harbour cruise to Clarke Island where dancers from the Indjibundji, Yirrkala and Torres Strait Islands perform ceremonial dances.
 - ▶ *Sydney*: Jabicos Tours. This company offers tourists the opportunity to visit historic Aboriginal sites in Sydney's Mount Ku-ring-gai national park.
 - ▶ *Sydney*: Let's Trek Australia. Amongst the tours offered by this company are tours which include components focusing on Aboriginal history and culture.
 - ▶ *Sydney*: National Aboriginal Cultural Centre. This centre, located at Darling Harbour, provides an opportunity for visitors to learn about Aboriginal culture and history.
 - ▶ *Sydney*: Palm Beach Experience. Tours offered by this company include visits to the Ku-ring-gai national park, and to the Palm Beach and Pittwater areas. These visits focus on the Aboriginal history and culture of the areas.
 - ▶ *Sydney*: Pittwater Experience. This company offers tours of the Ku-ring-gai national park, and the Hawkesbury River area, including a commentary provided (by tour leaders) on the Aboriginal cultural aspects of the areas.
 - ▶ *Sydney*: Sydney Aboriginal Discoveries. Tours offered by this company provide a number of opportunities to learn about the Aboriginal culture and history of the Sydney metropolitan area, including a visit to the Aboriginal rock engravings in the Royal National Park.
 - ▶ *Tenterfield*: Woolloomoolool Aboriginal Cultural Tours. This company provides a tour which highlights the Aboriginal history of the area (including a visit to the Boonoo Boonoo national park).
 - ▶ *White Cliffs*: Mootwingee National Park. This national park includes one of the state's most extensive collections of Aboriginal rock engravings. The NSW National Parks and Wildlife Service provides a tour, hosted by an Aboriginal guide, around this national park and around the engravings.⁵⁷

(f) **Wine Tourism**

At this time of writing, this area of tourism, at least as far as overseas visitors are concerned, appears to be still in a developmental stage (there are, of course, a great number

⁵⁷

Information provided by the Australian Tourist Commission.

of domestic visitors already travelling to the wine growing regions of NSW). There is, however, a Culinary Tourism Advisory Council, based in NSW Tourism, which supports the activities of bodies such as Hunter Valley Wine Country Tourism (located at Cessnock).

As a sign of the wine industry's awareness of the tourist potential of wine tourism, Albert Stafford and Associates were commissioned to write a tourism strategic plan for the Hunter wine country. The consultants nominated the following, potential, future sources of increased numbers of wine tourists: New Zealand; Japan; UK and Europe; USA and Canada; Singapore, Malaysia and Hong Kong.⁵⁸

(g) The Promotion Potential of Identifiably Australian Film/Television Locations

Another area, offering the potential to increase the number of inbound tourists, is the promotional influence of location settings of television series, or feature films, made in Australia. A ten-part Thai television series was filmed in Australia, in 1998. According to Lisa Southgate's summary of Australian Tourism Commission estimates, the eventual broadcast of the series generated \$3.4 million worth of publicity for Australia, as regards tourist arrivals from Thailand. A German television programme - Die Weine Der Neuen Welt (Wine of the New World) - was also filmed in Australia, generating, according to the ATC, \$2.7 million worth of publicity in Germany.⁵⁹

An obvious problem, in this regard, is that the filming of an Australian location as if it were, say, an American location, would have no promotional potential at all. As the ATC's John Morse has also remarked,

Drama that is shot in a location but masquerading as another is quite a different issue. For example, a series shot in Australia but pretending to be the US would be of minimal value from a tourism promotion aspect. . .⁶⁰

This issue has recently been epitomised by the use of New Zealand, as a location, by the producers of the series *Xena*. Lance Beckford, of Tourism Auckland, has been quoted as observing that when "we were last in the United States, we spoke to a lot of people and found there was no perception that the series was filmed here."⁶¹ It would seem to follow that, if the locations used for film and television undertakings are to be of promotional value in increasing the number of overseas visitors to Australia, then the locations would have to be identifiably Australian.

⁵⁸ Albert Stafford and Associates, *Tourism Strategic Plan 1998 - 2008: Hunter Wine Country* (Albert Stafford and Associates, Sydney, 1998), pp.8-10.

⁵⁹ Lisa Southgate, "Decent Exposure" in *The Australian*, 18 March 1999, p.30.

⁶⁰ Ibid.

⁶¹ Ibid.

7 CONCLUSION

Although, as outlined in the precursor to this report, inbound tourism has been the smaller part of tourism in Australia (with domestic tourists, in the 1970s, averaging nearly 90% of all tourist activity), because of the recent slowdown in domestic tourism (growing at a rate of only 1.8% during the 1990s) it is inbound tourism which is now seen as the area of tourist activity which can actually expand. Hence, not only are overseas visitors to New South Wales important in themselves, but it is this category of tourist, within overall Australian tourism, on which hopes for expansion of the industry now appear to rest.

Within the general realm of inbound tourism, there appear to be at least five areas where tourist numbers might be increased: Japanese visitation; meetings and conferences; backpacker tourism; agri-tourism; and Aboriginal cultural, and historical, tourism. At least three of these areas seem to offer prospects for tourism in the country regions of NSW. Agritourism clearly offers the greatest possibilities for attracting overseas to country areas of the state, because, by definition, it is based in the country. As outlined above, some agri-tourism operators specifically focus on overseas tourists. Backpackers, also, are already beginning to travel extensively to the rural parts of the state: not only to northern coastal NSW, but to inland NSW as well. Finally, although, on the one hand, Aboriginal cultural and historical tourism is only at a developmental stage, on the other hand, with so many locations based in the country, it also has the potential to attract overseas visitors to the rural regions of the state.

There have been a great number of predictions made, not only on the future importance of tourism to Australia but also on the likely increases in overseas visitors. While some of these forecasts may appear exaggerated, there seems no doubt that, as the chairman of IBIS Business Information has stated recently, “the driving factor [in tourism within Australia] is not so much domestic tourists but inbound tourism.”⁶²

⁶²Lisa Southgate, “New Economic Powerhouse” in *ibid.*, 30 April 1999, p.24.