



# The Value of the Arts and Cultural Sectors to the Visitor Economy of South East NSW

June 2021

**S<sup>o</sup>UTH  
EAST  
ARTS**

CONNECT CREATE CELEBRATE

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#### ACKNOWLEDGEMENT

We acknowledge the Indigenous peoples of the lands, waters and communities we work together with. We pay our respects to their cultures; and to their Elders – past, present and emerging.

#### DEFINITION OF AN ARTS AND CULTURAL VISITOR

For the purposes of this research report, South East Arts has used the Destination NSW definition of an arts and cultural visitor as one who:

- attends theatre, concerts or other performing arts;
- attends festivals, fairs, or cultural events;
- visits museums, art galleries, craft workshops or artist studios;
- visits historical heritage buildings, sites or monuments; and
- experiences Aboriginal art, craft, performances and cultural display

#### IMAGES

Cover image: Unsplash, Tyler Lastovich.

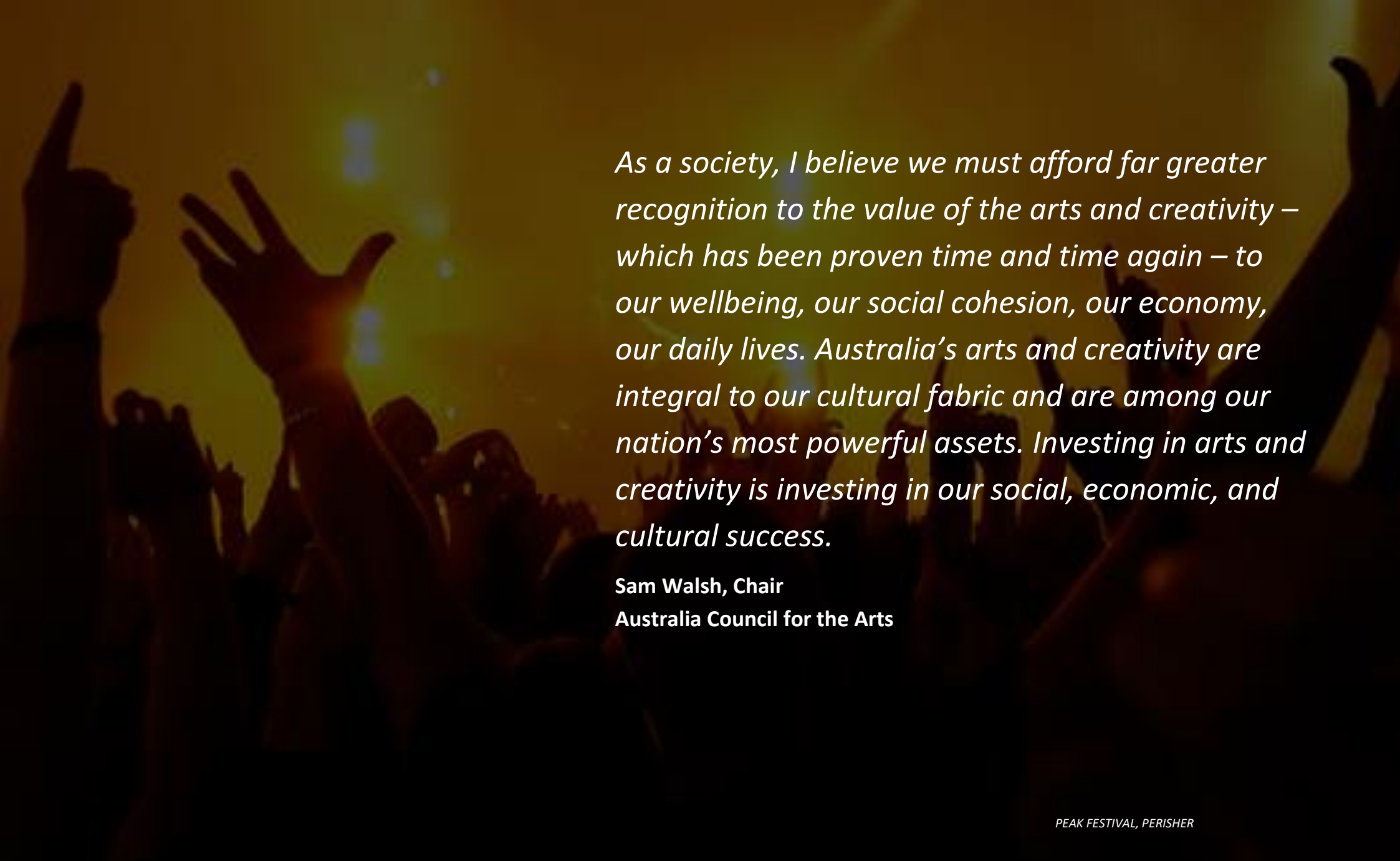
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*As a society, I believe we must afford far greater recognition to the value of the arts and creativity – which has been proven time and time again – to our wellbeing, our social cohesion, our economy, our daily lives. Australia’s arts and creativity are integral to our cultural fabric and are among our nation’s most powerful assets. Investing in arts and creativity is investing in our social, economic, and cultural success.*

**Sam Walsh, Chair  
Australia Council for the Arts**

PEAK FESTIVAL, PERISHER



# EXECUTIVE SUMMARY

The arts and cultural sector is economically and socially important to the towns and communities of Bega Valley, Eurobodalla and Snowy Monaro Local Government Areas. The sector attracts local, interstate, and international visitors and contributes to the state and regional economies. It is an essential part of the character, culture, and liveability of South East NSW.

The arts and cultural sectors support regional growth and tourism. This report provides an economic impact assessment of the value of this sector to the regional economy. It examines the value of the arts and cultural sector across the South East region as it relates to tourism, and the potential market for arts and cultural tourism across the region.

The 'region' referred to in this report is defined by the three local government areas Bega Valley, Eurobodalla, and Snowy Monaro. The report covers:

- An analysis of the market for arts tourism (an expanding market) utilising local area data from the Australia Council and the Australian Bureau of Statistics.
- Estimation of the value of the arts sector based on data from South East Arts on the number of practitioners, venues, and events in the region-based survey results.
- High-level estimates for the total sector across the region.

The analysis highlights that the arts and cultural sector contributes significantly to the regional economy. In summary:

- The sector has a significant multiplier impact at a regional level. For every \$1 of direct visitor spending on arts/cultural experiences, another \$4.70 in spending occurs in the region on food, accommodation, purchases and other visitor services.
- The sector's value to the region is \$272.5 million (arts and cultural spending \$57.9 million and other spending \$214.6 million).
- It generates a total of 960 FTE jobs annually in the region.

- It boosts annual regional income by \$87.5 million (through arts spending and other spending by local and visitors).

The analysis confirms that arts and cultural tourism is a growing market for the three local government areas. Domestic visitors travelling for arts and culture stay longer in the region than other types of visitors (4 days, compared to the NSW average of 3.5 days) and they spend 46% more per trip when compared to other domestic visitors.

In summary the region's art and cultural sector:

- Contributes to the regional economy by creating employment and generating household income.
- Strengthens the experience offering for visitors to the region driving tourism growth.
- Connects community and supports greater understanding.
- Contributes and strengthens social relationships and networks, which in turn, increase the likelihood of mental and physical health and wellbeing.

Arts and culture related businesses in the region are a vital part of the region's economic ecosystem. This interrelationship is essential not only stimulating the economy, but expanding the region's reputation as a destination, a place to both see and experience.

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# ARTS & CULTURAL SECTOR

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contributes significantly to the economies of the south east region of NSW - Bega Valley, Eurobodalla and Snowy Monaro

Every \$1 of direct visitor spending on arts experiences generates another

**\$4.70**

of spending in the region on food, accommodation, and other visitor services

The sector generates an estimated

**960 FTE JOBS**

annually in the region through arts and other spending by locals and visitors

The sector's estimated value to the region is

**\$272.5 million**

In 2019, there were 249,000 arts & cultural visitors, staying

**1,041,000**

nights

The arts and cultural sector boosts annual regional income by

**\$87.5M**

through arts and other spending by locals and visitors

# ARTS & CULTURAL VISITORS

	Bega Valley	Eurobodalla	Snowy Monaro	COMBINED
visitors	109,000	79,000	64,000	249,000
nights	466,000	335,000	241,000	1,041,000
spend per trip	\$684	\$588	\$799	\$688
spend per night	\$161	\$139	\$208	\$164

Art & cultural visitors to the region stay an average of 4 nights

58,001 international arts & cultural visitors stayed 388,000 nights

Tourism Research Australia figures  
(Based on 4-year averages for the year ending Dec 2016 to Dec 2019)

# Introduction

## This section outlines the purpose and scope of the report.

The region is made up of three local government areas: Snowy Monaro, Bega Valley and Eurobodalla. Collectively, they cover an area of 24,857km<sup>2</sup> with a combined population of 94,676 people. The combined Gross Regional Product is estimated at \$4.48 billion, which represents 0.7% of the state's GSP (Gross State Product).<sup>1</sup> The impact of the drought in 2018/19, the 2019/20 bushfires and ongoing Covid-19 pandemic has had a significant economic impact on the regional economy, businesses, and the community, including the arts and cultural sector.

The arts and cultural sectors are economically and socially important to the towns and communities of South East NSW. They attract local, interstate, and international visitors and contribute to the state and regional economy. The sector creates jobs, generates household income, supports tourism, and contributes to the economic development of towns, cities, and regions. Regional arts link people to broader community life through economic opportunities, improved quality of life and social connection. The sector is an essential part of the character, culture, and liveability of the region. More Australians now recognise the many positive impacts the arts have on our daily lives and in our communities (refer *Appendix A*).

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<sup>1</sup> <https://economy.id.com.au/>

## Report scope and structure

The purpose of this report is to identify the economic contribution of the arts and cultural sectors to tourism in the three LGAs regions. It has been commissioned by South East Arts, a regional arts development organisation.

The organisation's mission is to connect, create and celebrate regional culture as vital to community and economic development.

As part of the analysis of arts in the region an online survey was conducted of arts organisations. A total of 11 only responses were received. The survey results were used as the basis for modelling the current arts sector and its economic impacts. The analysis measures the economic footprint of the arts and cultural tourism sectors by estimating the direct and indirect economic impact on the regional economy. The report covers:

- An analysis the market for arts tourism (an expanding market) utilising local area data from the Australia Council and the Australian Bureau of Statistics.
- Estimation of the value of arts sector based on data from South East Arts on the number of practitioners, venues, and events in the region; detailed analysis of a survey; estimation of the economic impacts (jobs and regional income) for survey respondents.
- High-level estimates for the total sector in the region.

The analysis includes a discussion on quantitative and qualitative contributions and draws on several case studies to illustrate the social and community benefits to the region.



The report is structured in two parts as follows:

- **Part A.** Provides an overview of the current situation including the strategic context, description of the arts and cultural tourism sector, and examines the results from a survey conducted of members of South East Arts. This shows the scope of the arts sector and number of visitors to venues and events.
- **Part B.** Examines the potential market size for arts and cultural activities in the region. It incorporates an analysis of the market for arts tourism utilising local area data from the Australia Council, Tourism Research Australia, and the Australian Bureau of Statistics. This shows the potential market for arts operators in the region. It includes modelling of the sector (using the survey results) to assess its economic impacts in terms of visitor spending, jobs (direct and indirect/induced jobs) and the increase in regional income. The report then estimates the value the sector for the region.

To understand the economic value and impact of this sector, some data assumptions have been made (due to limited data being available for both residents and visitors to the region), with estimates based on figures available from state and national sources. The Part B analysis estimates the total size of the market for arts and cultural products/experiences, noting that this may not be currently achieved by operators in the region. The economic modelling demonstrates the potential size of the market and what could be achieved with further investment.



OMAR MUSA AT HEADLAND WRITERS FESTIVAL, TATHRA  
(IMAGE DAVID ROGERS)



## PART A. THE CURRENT SITUATION



GIIYONG FESTIVAL AUDIENCE (IMAGE DAVID ROGERS)



## Strategic Context

This section covers how the arts and cultural sector are positioned within the state and region. It examines the current economic impact of jobs and visitor spending in the region.

### Overview

The arts and cultural sectors include a wide range of activities, organisations, and institutions. It is a complex interconnected network that includes independent arts practitioners, not for profit organisations, private enterprises, public companies, government agencies and cultural institutions. The sector involves professional paid practice, and professional unpaid practice, government funded organisation and professional enterprises generating income from many sources. Contributions to the NSW economy by the sector occurs at local, state, and national level.

### Investment in arts

There is an increasing recognition that even a modest investment in the arts can deliver a significant return on investment for government agencies and the private sector.<sup>2</sup>

The NSW Government, under the Arts and Cultural Policy Framework, is investing \$100 million over four years for cultural infrastructure through the Regional Cultural Fund. Arts-based initiatives are being adopted to engage public debate, to create vibrant public spaces, to connect and inspire communities, and increasingly, to provide skills development and employment opportunities. Investment in cultural infrastructure and events is recognised as a way of attracting visitors and promoting a region's image as a cultural destination.

<sup>2</sup> Economic modelling in South East NSW by MCA / TRC Tourism

Involvement in arts-based activities has been shown to create pathways for personal and social development which increase prospects for employability, particularly for young people and those from culturally diverse or disadvantaged backgrounds.<sup>3</sup>

### NSW Visitor Economy Strategy

The NSW Government supports the growth of the state's tourism and events sector through Destination NSW. Destination NSW's role is to market Sydney and NSW as one of the world's premiere tourism and major events destinations. It supports regional tourism through:

- Destination Networks – responsible for developing visitor experiences, marketing, coordinating services to industry, local tourism organisations and councils, and administering Destination Management Plans
- Regional Flagship Events Program
- Regional Visitor Economy Fund

<sup>3</sup>

[https://creative.vic.gov.au/\\_\\_data/assets/pdf\\_file/0010/56359/The\\_Arts\\_Ripple\\_Effect\\_Valuing\\_the\\_Arts\\_in\\_Communities-2.pdf](https://creative.vic.gov.au/__data/assets/pdf_file/0010/56359/The_Arts_Ripple_Effect_Valuing_the_Arts_in_Communities-2.pdf)

Investment in the Arts, Recreation and Business Services space remains a priority for the attraction and retention of domestic and international visitors. These projects complement existing attractions, both natural and man-made, or draw new tourists into less visited areas. They are important in the development of tourism communities, to regional dispersal efforts, as arts and cultural visitors seek new and interesting experiences. In 2018–19, arts, cultural and museum infrastructure overtook sporting infrastructure to become a prominent source of investment in the pipeline, reaching \$5.7 billion. Growth in visitors seeking cultural and authentic experiences has helped to drive investment in this area.<sup>4</sup>

## South East Arts

South East Arts is one of 14 Regional Arts Development Organisations operating under the Regional Arts Network along with the service organisation Regional Arts NSW. The organisation’s vision is to ensure that arts and culture are at the heart of community life. Their mission is to connect, create and celebrate regional culture as vital to community and economic development.

One of South East Arts’ roles in the region is to support artists, communities and local government in developing arts and culture. This role takes on many forms, from arts business and marketing training to professional skills development.

Their communication and promotion of arts events and news helps to build audiences and profile the work of individual artists and organisations in our region. In addition, South East Arts provides advice to local, state, and federal government peak bodies, creating a valuable link between government and the community.

In 2019, South East Arts total expenditure was \$422,474 in the region.<sup>5</sup> This amount contributed to supporting artists and communities in developing the arts and culture industry. South East Arts is governed by a volunteer board of management, made up of three council representatives and seven skills-based members.

## Local Government

There is strong and growing potential for the arts to help drive regional tourism, and local Governments play a critical role in supporting local artist and providing an environment where this can happen. The role of local Governments in South East NSW is to facilitate, support and advocate for cultural and creative industries by supporting local artists and performers and bringing new artists and artforms into the region. Snowy Monaro, Eurobodalla and Bega Councils have developed their own strategies to support the arts and cultural sectors and the visitor economy within their boundaries.

Research conducted by the ABS, the 2017-18 ‘Multipurpose Household Survey’ for the electorate of Eden Monaro (that covers all South East Arts locations, [www.australiacouncil.gov.au/research/electorate-profiles/eden-monaro/#!Eden-monaro](http://www.australiacouncil.gov.au/research/electorate-profiles/eden-monaro/#!Eden-monaro)) indicated that the local community are very much involved in the creative industries sector. People in the electorate area attended a range of venues and events including theatre, dance, and music performances as well as cinemas, arts galleries, and museums.

- 36% were involved in creative activities themselves, such as performing, singing, or playing a musical instrument, dancing, writing, visual art and craft.
- 74% attended cultural venues or events.
- 43% attended performing arts.
- 29% attended live music.
- 15% attended a gallery.
- All children in the electorate participated in creative activities.

In the Electorate, of the people who purchased tickets for art events, the average spend was \$468, 4.8% above the national average spend. When compared to sporting events, the average spend was \$255, -6% difference compared to the national average.

<sup>4</sup> Tourism Investment Monitor Nov 2019 TRA/ Austrade

<sup>5</sup> South East Arts Annual Report 2019



## Local Businesses

The ABS provides data on the number of businesses in the arts and recreation sectors. It is estimated that the region has approximately 100 businesses in the arts and recreation sector in the 2015-2019 period, increasing to 112 in 2020 9 (Tables 1 and 2).

- 34% Bega Valley
- 33% Eurobodalla
- 33% Snowy Monaro

As is typical for arts and cultural businesses, most are small. In 2020, 63 were non-employing businesses, 43 have 1-19 employees and only 6 are in the range 20-199 employees.

**Table 1.** Businesses by LGA 2015-2020 (no.)

Summary Table - Businesses (Arts & Recreation Services)	2015	2016	2017	2018	2019	2020
<b>Bega Valley LGA</b>	44	40	38	37	35	38
<b>Eurobodalla LGA</b>	27	32	30	30	27	37
<b>Snowy Monaro LGA</b>	26	25	32	30	35	37
<b>Total 3 LGAs</b>	<b>97</b>	<b>97</b>	<b>100</b>	<b>97</b>	<b>97</b>	<b>112</b>

SOURCE: ABS REGIONAL PROFILES, 2020 – LGA

**Table 2.** Businesses by Employment Size 2020 (no.)

Local Government Area 2020	Non employing no.	1-19 Employees no.	20-199 Employees no.	200+ Employees no.	Total no.
<b>Bega Valley LGA</b>					
<b>Arts &amp; Recreation Services</b>	23	15	0	0	38
<b>Total Businesses</b>	<b>1,790</b>	<b>1,314</b>	<b>49</b>	<b>3</b>	<b>3,150</b>
<b>Eurobodalla LGA</b>					
<b>Arts &amp; Recreation Services</b>	20	14	3	0	37
<b>Total Businesses</b>	<b>1,689</b>	<b>1,175</b>	<b>71</b>	<b>3</b>	<b>2,939</b>
<b>Snowy Monaro LGA</b>					
<b>Arts &amp; Recreation Services</b>	20	14	3	0	37
<b>Total Businesses</b>	<b>1,529</b>	<b>1,107</b>	<b>63</b>	<b>0</b>	<b>2,697</b>
<b>Total 3 LGAs</b>					
<b>Arts &amp; Recreation Services</b>	<b>63</b>	<b>43</b>	<b>6</b>	<b>0</b>	<b>112</b>
<b>Total All Businesses</b>	<b>5,008</b>	<b>3,596</b>	<b>183</b>	<b>6</b>	<b>8,786</b>

SOURCE: COUNTS OF AUSTRALIAN BUSINESSES, INC. ENTRIES AND EXITS, JUNE 2016 TO JUNE 2020 (8165.0), ABS, FEBRUARY 2021

## Jobs in Region

Jobs data is available from the ABS Census for the Arts Sector and for Media Sector (Table 3). Within the three LGAs there were a total of 434 jobs – 300 Arts and 134 Media. Many of these jobs involve arts and creative practitioners, as well as arts venues, festivals, and events. The distribution of arts and media jobs across SE region is as follows:

- 38% Bega Valley
- 28% Eurobodalla
- 34% Snowy Monaro

**Table 3.** Arts and Media Jobs in the LGAs 2016 (no.) For comparison Sports and Recreation jobs have been included.

Summary Table Creative Jobs in Region	Bega Valley LGA	Snowy Monaro LGA	Eurobodalla LGA	Total 3 LGAs
<b>Arts and Recreation Services</b>				
Arts and Recreation Services, nfd	11	7	0	18
Heritage Activities	53	78	65	196
Creative and Performing Arts Activities	42	16	28	86
Sports and Recreation Activities	95	706	99	900
Gambling Activities	0	3	3	6
<b>Total</b>	<b>199</b>	<b>812</b>	<b>197</b>	<b>1,208</b>
<b>Total Arts</b>	<b>106</b>	<b>101</b>	<b>93</b>	<b>300</b>
<b>Media</b>				
Publishing (except Internet and Music Publishing)	22	17	18	57
Motion Picture and Sound Recording Activities	19	13	9	41
Broadcasting (except Internet)	20	12	4	36
Internet Publishing and Broadcasting	0	0	0	0
<b>Total Media</b>	<b>61</b>	<b>42</b>	<b>31</b>	<b>134</b>
<b>Total Arts &amp; Media</b>	<b>167</b>	<b>143</b>	<b>124</b>	<b>434</b>

SOURCE: ABS CENSUS 2016 -WORKING POPULATION PROFILE , LOCAL GOVERNMENT AREAS

## South East Arts Local Business Survey – Current Economic Impact

As part of the analysis of arts in the SE region an online survey was conducted of arts organisations. Only a narrow selection of businesses returned survey results. A total of 11 responses<sup>6</sup> were received comprising of 2 from Bega Valley LGA, 6 from Eurobodalla LGA and 3 from Snowy Monaro LGA. *Appendix B* has additional results from the local survey.

Table 4 indicates the number of total businesses, organisations and art associations in the SE Arts region.

**Table 4.** Regional Art and Cultural Businesses and Organisations as supplied by South East Arts

Sector	SE Arts region
<b>Performing arts inc music, theatre, concerts</b>	35 music venues/organisations and 85 individual musicians 6 theatre venues and 35 theatre clients (orgs/groups and individuals)
<b>Visual Arts inc art galleries, studios, public art</b>	14 galleries, 120 individual artists (includes studios) and generally support development of public art - 52 listings at the moment of individual public artworks
<b>Museum or heritage site</b>	15 museums/heritage sites
<b>Arts/cultural festival or event</b>	32 festivals/events
<b>First nations craft or display</b>	45 individual artists, 7 organisations

<sup>6</sup> Note: that some businesses with significant turnover did not return a survey, including one with an annual turnover in 2019 of \$1.1million and ticket sales of \$224,000.

## Survey Results

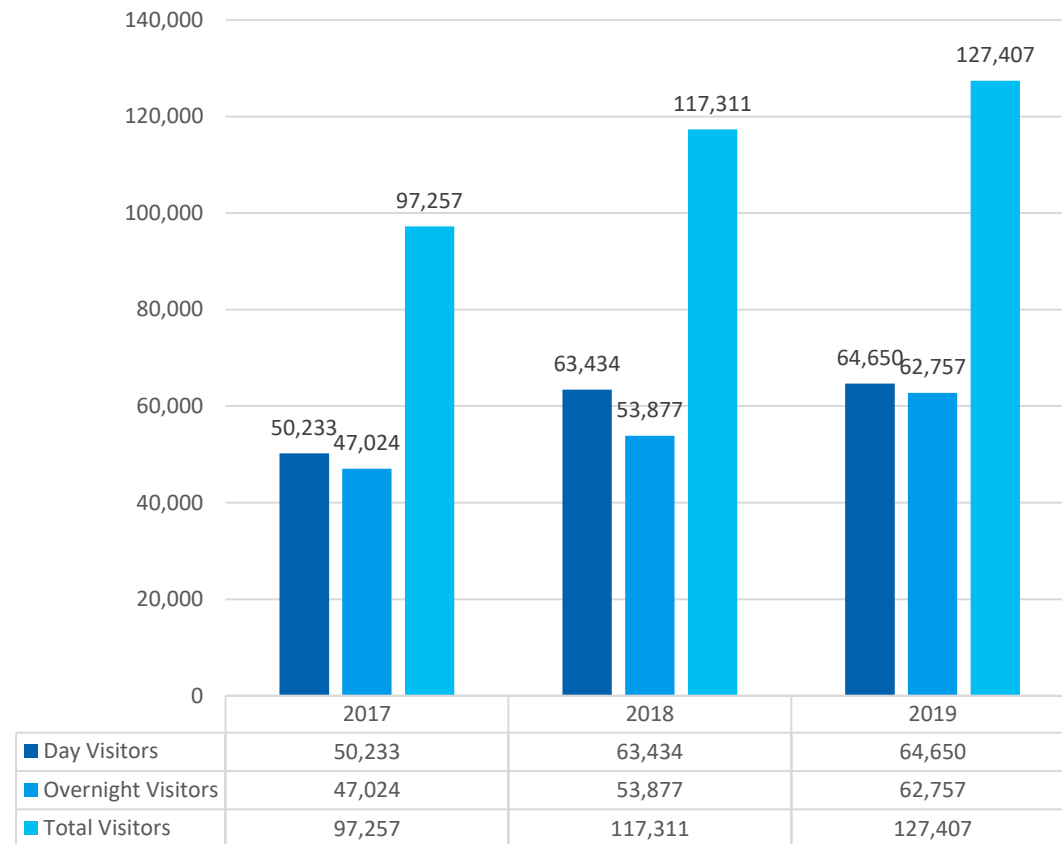
The survey results were used as the basis for modelling the current arts sector and its economic impacts. For those businesses that responded, the analysis shows:

- Visitors in 2019 were evenly divided between day visitors (64,683 or 50.8%) and overnight visitors (62,774 or 49.2%).
- A total of 127,407 persons attended facilities or venues in 2019. This was up from 117,311 in 2018.
- For 2019, around 35% of visitors (44,399) were from the local area; around 11% from ACT (13,374) and 15% from Sydney (18,496). Further afield - 8% (10,170) were from other NSW locations; 16% from Victoria (20,333); 8% other interstate (10,188); and 8% international visitors (10,518).
- Employees and volunteers: The organisations had limited staff and made a substantial use of volunteers, particularly for the festivals and other events. In total the organisations had only 34 staff (24 casuals, 5 full time workers and 5 part time workers).
- Most organisations are dependent on volunteers to continue operations. In the absence of volunteers, most of the organisations would not be able to function. Volunteers are particularly important for the festivals and events.

## Visitors to arts and cultural places increased

The survey results indicate that visitors increased from around 97,300 in 2017 to 127,400 in 2019 (Figure 1). Due to Covid restrictions 2019 was the last full year of events and activities and was used for the analysis.

**Figure 1.** Visitors 2017-2018 Estimates (no.)

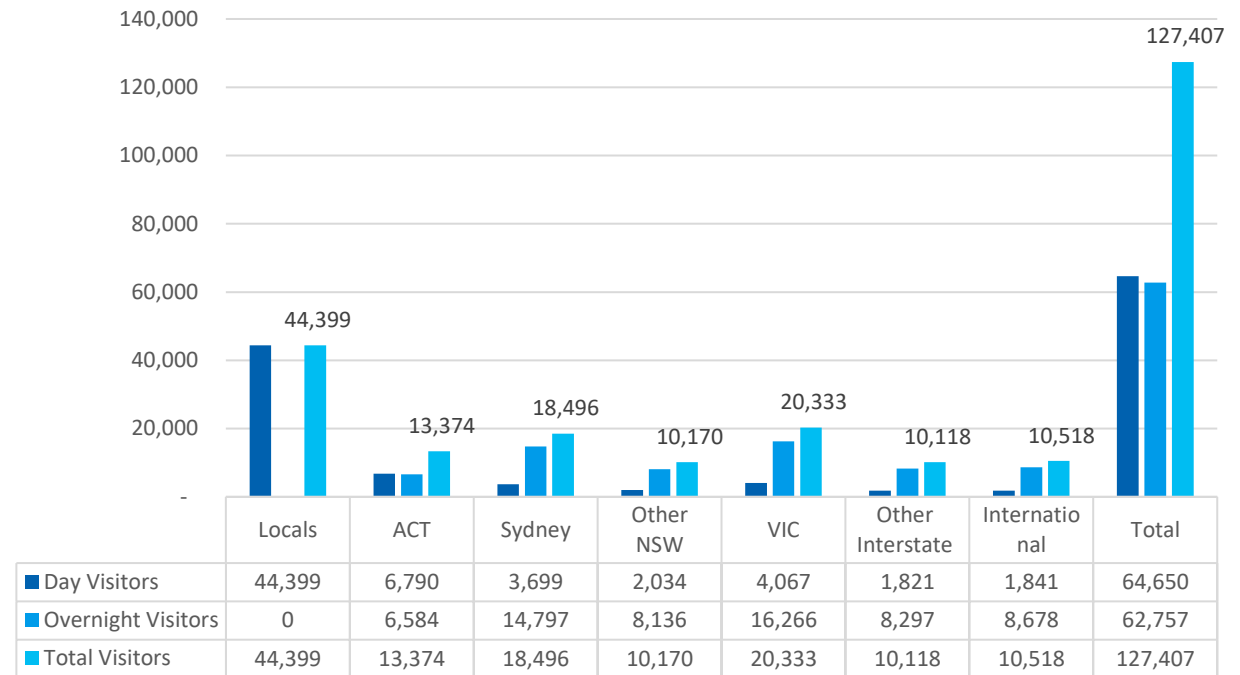


SOURCE: DERIVED FROM SE ARTS SURVEY MARCH 2021 (SE ARTS)



Over one third, 44,400 were residents of the 3 LGAs. Other major sources were the ACT (around 13,400), Sydney (18,500), and visitors from Victoria (20,300). Other regional New South Wales visitors, other interstate and international visitors accounted for similar numbers and totalled around 30,800. Of the total visitors, day visitors (including all the locals) accounted for 51% and overnight visitors for 49%. (Figure 2)

**Figure 2.** Visitors by Residence Location 2019 (no.)



SOURCE: DERIVED FROM SE ARTS SURVEY MARCH 2021 (SE ARTS)

## Spending at arts and cultural places

Spending by visitors in the region for 2019 (Table 5) was estimated at \$43.3 million and comprised \$6.6 million in arts spending and \$36.7 million of other spending (on food, accommodation, retail, and other visitor activities).

The results of the South East Arts survey showed that arts activities have a significant multiplier impact at a regional level. For every \$1 of direct visitor spending on arts/music experiences, another \$4.70 in spending occurs in the region on food, accommodation, purchases and other visitor services. Arts consumers are a combination of locals, day visitors and overnight visitors.

**Table 5.** Spending in the Region by Arts Visitors 2019 (\$ million 2020 prices)

Arts Visitors - Spending								
Year 1 (2019) (\$2020 prices)	Locals (3 LGAs)	ACT	Sydney	Other NSW	VIC	Other Interstate	Internets	Total
<b>Total All Spending</b>								
<b>Day Visitors</b>	\$3.108	\$1.141	\$0.621	\$0.342	\$0.683	\$0.306	\$0.236	\$6.436
<b>Overnight Visitors</b>	\$0.000	\$3.950	\$8.878	\$5.858	\$9.760	\$4.978	\$3.471	\$36.895
<b>Total All Spending</b>	<b>\$3.108</b>	<b>\$5.091</b>	<b>\$9.500</b>	<b>\$6.199</b>	<b>\$10.443</b>	<b>\$5.284</b>	<b>\$3.707</b>	<b>\$43.331</b>
<b>Arts Spending</b>								
<b>Day Visitors</b>	\$1.332	\$0.204	\$0.111	\$0.061	\$0.122	\$0.055	\$0.055	\$1.939
<b>Overnight Visitors</b>	\$0.000	\$0.494	\$1.110	\$0.610	\$1.220	\$0.622	\$0.651	\$4.707
<b>Total Arts Spending</b>	<b>\$1.332</b>	<b>\$0.697</b>	<b>\$1.221</b>	<b>\$0.671</b>	<b>\$1.342</b>	<b>\$0.677</b>	<b>\$0.706</b>	<b>\$6.646</b>
<b>Other Visitor Spending</b>								
<b>Day Visitors</b>	\$1.776	\$0.937	\$0.510	\$0.281	\$0.561	\$0.251	\$0.180	\$4.497
<b>Overnight Visitors</b>	\$0.000	\$3.457	\$7.768	\$5.247	\$8.540	\$4.356	\$2.820	\$32.188
<b>Total Other Spending</b>	<b>\$1.776</b>	<b>\$4.394</b>	<b>\$8.279</b>	<b>\$5.528</b>	<b>\$9.101</b>	<b>\$4.607</b>	<b>\$3.001</b>	<b>\$36.685</b>

SOURCE: MCA MODELLING & ANALYSIS APRIL 2021.



BASIL SELLERS EXHIBITION CENTRE, MORUYA

## Art and Cultural Tourism

This section examines the characteristics of art and cultural visitors to the region and to the state, and highlights the trends and potential opportunities that cultural tourism can offer.







### Introduction

Tourism provides an opportunity for domestic and international visitors to immerse themselves in cultural experiences, and many Australians are travelling to experience the arts: at concerts, in galleries, on stages, or through more niche opportunities across the country. Arts experiences have a growing role as a driver for tourism in Australia and are increasingly part of visitors' itineraries.

### Who are arts and cultural visitors?

Destination NSW's definition of an art and cultural visitor is a visitor who participates in at least one of the following activities: attend theatre, concerts or other performing arts; attend festivals, fairs, or cultural events; visit museum or art galleries; visit art, craft workshops or studios; visit historical heritage buildings, sites or monuments; experience Aboriginal art, craft and cultural display; visit an Aboriginal site or community; attend Aboriginal performance (international visitors only). Note: a visitor may also participate in other activities. Cultural tourism is broader than this and includes, for example, street art experiences and the business of providing cultural tourism experiences.

**Table 6.** Arts and Cultural Visitors to Bega, Eurobodalla and Snowy Monaro LGAs

	Combined	Bega LGA	Eurobodalla LGA	Snowy Monaro LGA
 <b>Visitors</b>	249,000	109,000	79,000	64,000
 <b>Nights</b>	1,041,000	466,000	335,000	241,000
 <b>Average Nights</b>	4	4	4	4
 <b>Expenditure</b>	\$171 million	\$75 million	\$46 million	\$50 million
 <b>Spend per trip</b>	\$688	\$684	\$588	\$779
 <b>Spend per night</b>	\$164	\$161	\$139	\$208

SOURCE: TOURISM RESEARCH AUSTRALIA FOUR-YEAR AVERAGE YE DEC 2016-YE DEC 2019



Nationally, domestic arts and cultural visitors are similar in profile to the average domestic visitor (see *Appendix C*). At a regional level, domestic overnight art and cultural visitors spent approximately \$171 million in 2019.

- They stay an average of 4 nights in the region.
- Most visitors came from intrastate (126,000), followed by 55,000 VIC and 50,000 ACT.
- 151,000 were female, 98,000 male.
- Domestic nights were overwhelmingly for holiday purposes 839,000 followed by Visiting Friends and Relatives 178,000.
- Visitor ages were evenly split between 35-44 / 45-54 age groups (180,000+ each) followed by over 70 (156,000) and 65-69 (127,000).

Further information on can be found in *Appendix D*.

The following trends highlight the opportunities cultural tourism can offer to regional communities.

### Arts and cultural tourism is growing

Along with population growth and overall growth in domestic tourism, the numbers of Australians engaging with the arts while exploring their own country is growing. In 2019 in NSW, there were:

- 4.1 million visitors (up 3.1% year on year) art and cultural visitors in the state.
- Staying 83.1million nights.
- Spending \$14.3 billion (up 2.4% year on year).<sup>7</sup>
- The average length of stay for an arts overnight trip was 3.8 nights, slightly longer than for other domestic trips.<sup>8</sup>
- Holiday travel was the largest driver, accounting for 61% of overnight trips. Visiting friends and relatives was the second largest category (26% of trips).
- Almost 30% of visitor nights were in the home of a friend or relative.

- The most popular arts and cultural activities were attending museums and art galleries, accounting for 51% of visitors.
- Arts and culture visitors had a propensity for social activities, such as: eating out at a café or restaurant – 83% of visitors; visiting friends or relatives – 42% and going sightseeing – 47%.
- There have been increases across all arts activities: visiting museums and art galleries; attending performing arts; visiting art or craft workshops or studios; attending festivals; and experiencing First Nations arts and craft – more domestic visitors attend the arts than organised sport, amusement parks or wineries.

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

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

<sup>7</sup> Destination NSW Report Culture and Heritage Based Tourism factsheet YE Dec 2019

<sup>8</sup> [www.tra.gov.au/Domestic/domestic-visitor-profiles](http://www.tra.gov.au/Domestic/domestic-visitor-profiles)

## Art and cultural visitors stay longer and spend more

Art and cultural visitors in the region stay longer on overnight trips (4 days, compared to 3.5 days) and spend more per trip than domestic visitor overall (46% more), indicating the potential of arts and creative activities to support local economies. (Table 7)

**Table 7.** Visitor Expenditure and Length of Stay

Spending Assumptions - Visitors	Day Visitors - Arts	Day Visitors- General	Domestic O/N Arts	Domestic O/N General	International Visitors
<b>Ave Spend (per day) /person</b>	\$138	\$108	\$240	\$164	\$63
<b>Average Length of stay (nights)</b>	-	-	4	3.5	7

SOURCES: AVERAGE SPENDING: DOMESTIC ARTS TOURISM CONNECTION THE COUNTRY, AUSTRALIA COUNCIL FOR THE ARTS ; TRA DATA FOR SE ARTS 2019; TRA ARTS AND CULTURE 2019

## Regional museums and galleries are popular

When visitors go into regional Australia, about 43% go to galleries, concerts, or museums — that compares to around 13% who are visiting wineries or organised sports events.

Research conducted by Museums and Galleries NSW in 2015 shows that visitors already comprise 40% of regional museum audiences – a significant audience segment with the potential for growth.<sup>9</sup> In the Bega Shire LGA a recent study<sup>10</sup> suggests that local museums attracted more than 57,000 visitors annually.

<sup>9</sup> M&GNSW *Guess who's going to the museum?* 2015

<sup>10</sup> History and Heritage Museums of the Bega Valley Shire - Sector Survey 2020

<sup>11</sup> [www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf](http://www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf)

## Aboriginal art and culture is a growing area of domestic tourism

Aboriginal art and cultural tourism is increasing, reflecting Australians' strong and growing interest in engaging with first nations arts for their beauty, strength and power, and to understand who we are as a nation. The Australia Council's National Arts Participation Survey found that nearly half of all Australians are actively interested in first nations arts (47%) and seven million attended in 2016 – a record level of attendance and double that of 2009.<sup>11</sup>

Tourism Research Australia's domestic tourism data shows that many Australians want to experience First Nations culture while on holiday or are willing to travel to experience First Nations arts and craft.<sup>12</sup>

## International tourism

Arts and cultural 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.

Pre covid, international arts and cultural tourism to Australia was growing. Over the last five years, it had grown at a higher rate than overall international tourism. There is strong and growing potential for the arts to help drive regional tourism in the future. Research shows that international arts visitors are more likely to visit regional Australia than international visitors overall.<sup>13</sup> Arts and cultural visitors are more likely to travel outside capital cities (42%) than overall visitors (34%). This trend is growing – since 2013 there has been a 41% increase in international arts and cultural tourists visiting regional areas, while total international tourists visiting regional areas increased by 37%.<sup>14</sup>

<sup>12</sup> [www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf](http://www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf)

<sup>13</sup> [www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf)

<sup>14</sup> [www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf)

## The future of arts and cultural travel

Tourism is undergoing a fundamental shift as travellers rethink where they want to go and why.

With a return to travel on the distant horizon as vaccinations slowly begin rolling out, travellers are reconsidering what they want out of a trip. After a year of heightened isolation and loneliness, they are not just looking to get away; they're looking for meaningful connection and opportunities for self-reflection.

As a result, where people choose to go and why is dramatically shifting. The motivations for travel have changed. Seeing friends and family is the highest ranked reason for wanting to travel: 51% say the first people they will visit are immediate family and 41% say that travel to visit friends and family has become “much more” important to them. And over a third (37%) said their definition of “meaningful” travel has changed to focus more on time with loved ones.<sup>15</sup>

South East Arts can capture more of the visiting friends and family market by ensuring the local communities are advocates of their creative places and spaces. If locals can gain a meaningful connection to local galleries, events, and museums, it is more likely they will encourage their visitors to do the same.

<sup>15</sup> [https://intelligence.wundermanthompson.com/2021/02/meaningful-travel/?mc\\_cid=49607a9169&mc\\_eid=1a34f50e9c](https://intelligence.wundermanthompson.com/2021/02/meaningful-travel/?mc_cid=49607a9169&mc_eid=1a34f50e9c)

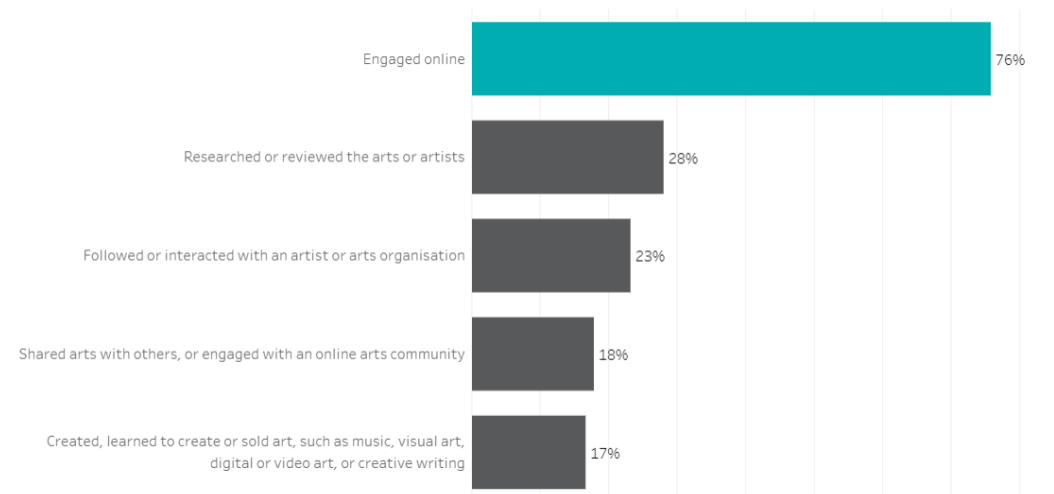
## Online engagement is booming

The arts are more accessible than ever. The digital age is adding to and changing our perception of creativity. It is changing the way people work and opening up a world of creativity to new groups of people. Investment in digital infrastructure is vital to retaining a competitive edge and ensuring the city and region can thrive into the future. At the same time, the ‘gig’ economy is changing the nature of employment and presenting new challenges and opportunities to those trying to sustain a creative career.

South East Arts have invested in new website design, podcast and are active on social media promoting what is on in the region, with over 1500 followers on Instagram and regular Facebook updates. This digital presence is important to ensure the arts remain accessible to all and promoted.

In regional NSW, (Figure 3) people engaging online with the arts far exceeds other means of engagement.<sup>16</sup>

**Figure 3.** Online Engagement with the Arts



<sup>16</sup> [www.australiacouncil.gov.au/research/connecting-australians-states-territories/](http://www.australiacouncil.gov.au/research/connecting-australians-states-territories/)

## The rise of festivals

Audiences for Australian multi-arts festivals have been growing. Results of the National Arts Participation Survey 2017 shows that one in five Australians attends multi-art form festivals. 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.
- The 2017 Darwin Festival increased ticket sales by 75% on 2016 sales.

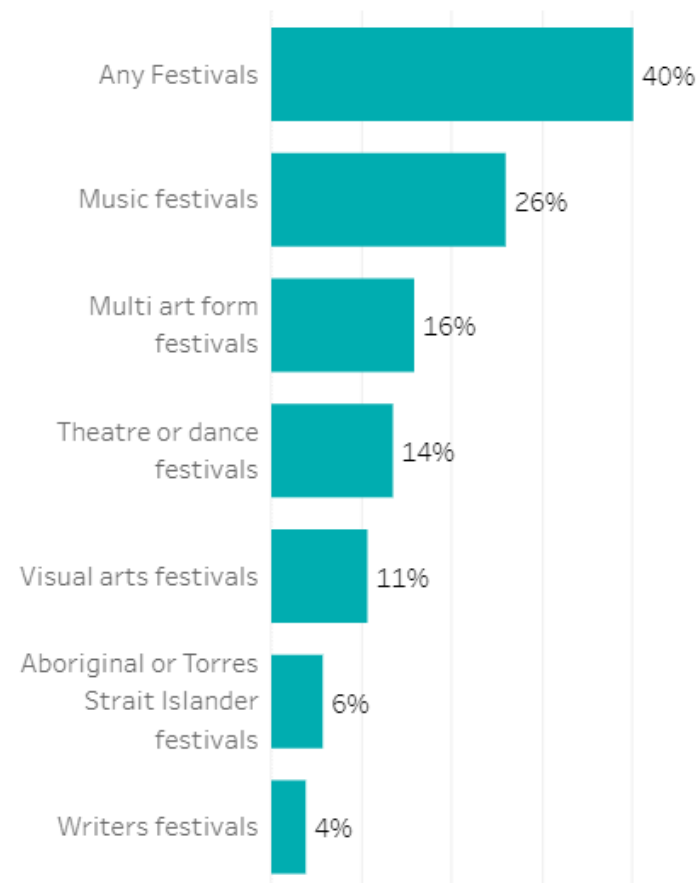
Festivals provide exposure for artists and opportunities for audiences to experience a wider variety of arts than they ordinarily might.

The number of and types of festivals are also increasing. A major study by Creative Victoria found that over half of creative festivals in Victoria had begun in the last ten years. 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. 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.

The recent Destination Southern NSW Regional Event Support Program report highlights that major events in the Destination Southern region attracted over 160,000 visitors annually.

In regional NSW, 40% of residents<sup>17</sup> attended a festival event in 2016 (Figure 4)

Figure 4. Festival Attendance



<sup>17</sup> [www.australiacouncil.gov.au/research/connecting-australians-states-territories/](http://www.australiacouncil.gov.au/research/connecting-australians-states-territories/)

The region's proximity to population centres in Canberra, Sydney and regional NSW provides important opportunities to promote its distinct events to attract new and repeat visitors to the region. The South East Arts region is a significant proportion of the area defined by Destination Southern NSW. With this larger region, it was found that:

- Major events attracted over 160,000 visitors annually to the broader region, including total event attendance as:
  - 57,513 in the Snowy Monaro region.
  - 43,072 people in the Eurobodalla region.
  - 39,350 in Bega Valley region.
- These events contributed \$74.1 million annually to the regional economy.
- Supporting 369 full time jobs.
- With a value add of \$36.4million to regional economies.

Major events in the region are highlighted in Table 8 with attendance numbers.<sup>18</sup>

**Table 8.** Major Events with the Region

EVENT	PLANNED 2021 DATE	LOCATION	TYPE	CATEGORY	ATTENDANCE
<b>BEGA VALLEY</b>					
Art Month	1-31 Aug	Bega	Arts	Tourism	Digital Aud.
Bermagui Blue Water Classic	22-25 Jan	Bermagui	Sport	Major	400+
Cobargo Folk Festival	March	Cobargo	Music	Tourism	6,000
Eat Fest	7 Mar	Merimbula	Food	Major	4,000
Eden Caravan Muster	6-12 Sep	Eden	Culture	Minor	500
Four Winds Easter Festival	3-4 Apr	Bermagui	Music	Major	6,000
Giiyong Festival	9 Oct	Pambula Eden	Arts	Tourism	5,500
Merimbula Classic	25-28 Nov	Merimbula	Sport	Major	500
Merimbula Jazz Festival	21 Jun	Merimbula	Music	Major	1,800
Reboot in Bermagui	2-3 Oct	Bermagui	Arts	Major	9,300
Sculpture Bermagui	6-14 Mar	Bermagui	Arts	Major	9,300
Whale Fest	6-7 Nov	Eden	Culture	Major	5,000
<b>EUROBODALLA</b>					
Batemans Bay Lifestyle & Leisure Roadshow	5-7 Nov	Batemans Bay	Sport	Tourism	5,500
Batemans Bay Triathlon Festival	6 Feb	Batemans Bay	Sport	Major	1,600
Jetblack Wild Wombat MTB Challenge	21-22 Nov	Mogo	Sport	Tourism	472
Narooma Oyster Festival	30 Apr	Narooma	Food	Major	5,000
Red Hot Summer Tours	N/A	Batemans Bay	Music	Major	5,000
River of Art	17-27 Nov	Batemans Bay	Arts	Major	25,000
<b>SNOWY MONARO</b>					
Australian National Busking Championships	13 Nov	Cooma	Music	Major	600
Cooma Agricultural Show	13 Mar	Cooma	Arts & Culture	Major	3,000
Cooma Multicultural Festival	21 Mar	Cooma	Arts & Culture	Major	5,000
Lake Light Sculpture Fest	2-5 Apr	Lake Jindabyne	Arts	Major	25,000
Snowies MTB Festival	21 Feb	Alpine Region	Sport	Major	1,227
Snowtunes	21 Sep	Jindabyne	Sport / Music	Major	15,000
Snowy Mountains Trout Festival	21 Oct	Lake Jindabyne	Sport	Major	700+
Snowy River Extreme Race	21 Oct	Jindabyne River	Sport	Tourism	176
Snowyride	6 Nov	Alpine River	Sport / Leisure	Major	2,500

SOURCE: DESTINATION SOUTHERN NSW REGIONAL EVENT SUPPORT PROGRAM

<sup>18</sup> Draft Document: Destination Southern NSW Regional Event Support Program



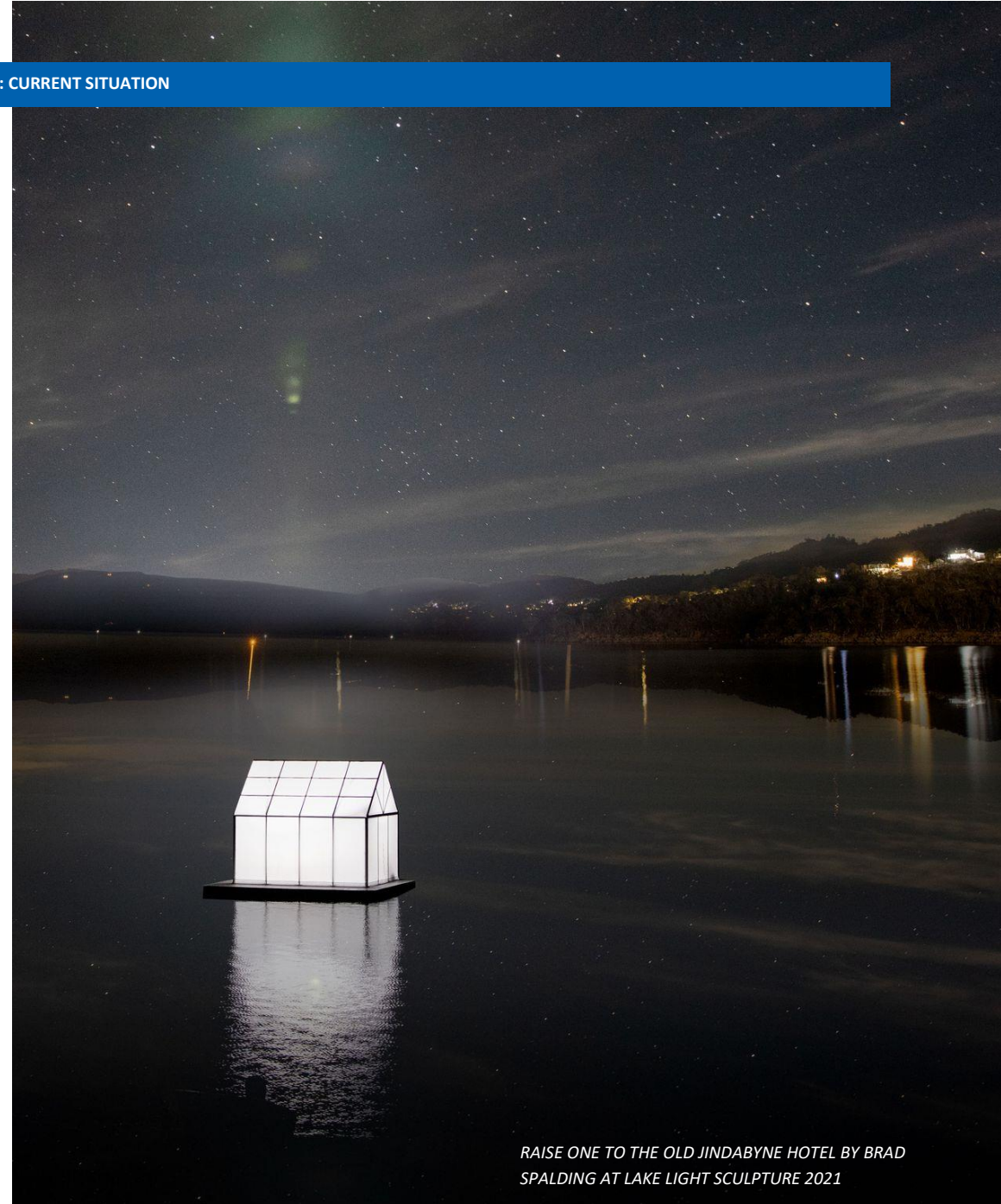
The report (Destination Southern NSW Regional Event Support Program) identifies the type of events in the Bega Valley, Eurobodalla Region, Queanbeyan-Palerang Region, and Snowy Monaro Region as:

- 31% Arts and Culture.
- 14% Music.
- 14% Sports.
- 14% Food & Wine.
- 14% Community.

Combining the estimated visitor origin from each event identified:

- 42% of attendees are from within their local government area.
- 19% of attendees are from Canberra.
- 10% of attendees are from regional NSW.
- 8% of attendees are from Victoria.
- 7% of attendees are from Sydney.

Data supplied by event organisers indicates the average length of stay for visitors attending events is 2-3 nights.



RAISE ONE TO THE OLD JINDABYNE HOTEL BY BRAD SPALDING AT LAKE LIGHT SCULPTURE 2021



# PART B. THE POTENTIAL MARKET FOR ARTS AND CULTURAL ACTIVITIES IN THE REGION



FOUR WINDS FESTIVAL, EASTER 2021 (IMAGE DAVID ROGERS)



## Regional Market for Arts and Cultural Tourism Analysis

This section estimates the potential number of people undertaking or participating in arts and cultural experiences in the region. This includes residents and visitors.

There are two sides to the sector - the demand side and the supply side. The demand side is the market for arts and cultural services and comprises locals and visitors, who are interested in arts and cultural experiences (galleries, venues, and events). The supply side comprises individual practitioners (visual artists, musicians, writers etc.); venues-galleries, theatres, etc.; and festivals and events.

To understand the economic value and impact of this sector, some data assumptions have been made (due to limited data being available for both residents and visitors to the region), with estimates based on figures available from state and national sources. The analysis estimates the total size of the market for arts and cultural products/experiences. The modelling demonstrates the potential size of the market and what could be achieved with future development.



## Local market demand

### Attendance at events and venues by residents

It is estimated that 42,200 residents took part in art and cultural activities in the region in 2020. 28,100 residents attended art and cultural activities outside the region. The Eurobodalla Shire and Bega Valley Shire generated the highest level of activity. (Table 9) The estimated participation rates were greatest for the Cinema (59%), Performing Arts (43%), Live Music (29%); and Galleries/Museums (15%)

Local resident art activity LGA breakdown:

- 37% Bega LGA
- 41% Eurobodalla LGA
- 22% Snowy Monaro LGA

**Table 9.** Local Residents and Arts Activity (no.)

Local Residents Arts Activity SE Arts LGAs	Population	Visit Art Galleries/ Museums (15%)	Live Music (29%)	Performing Arts (43%)	Cinema (59%)	Total Attend Cultural Venues or Events (75%)
<b>Arts Experience</b>						
<b>Bega Valley LGA</b>	34,467	5,170	9,995	14,821	20,336	25,850
<b>Eurobodalla LGA</b>	38,473	5,771	11,157	16,543	22,699	28,855
<b>Snowy Monaro LGA</b>	20,795	3,119	6,031	8,942	12,269	15,596
<b>Total 3 LGAs</b>	<b>93,735</b>	<b>14,060</b>	<b>27,183</b>	<b>40,306</b>	<b>55,304</b>	<b>70,301</b>
<b>Attendance - Location</b>						
<b>Outside Region</b>	40%	5,624	10,873	16,122	22,121	28,121
<b>In Region</b>	60%	8,436	16,310	24,184	33,182	42,181
<b>Total</b>		<b>14,060</b>	<b>27,183</b>	<b>40,306</b>	<b>55,304</b>	<b>70,301</b>

SOURCES: POPULATION PROFILE ID DATA 2019 ; ARTS EXPERIENCE PERCENTAGES BASED ON NATIONAL ARTS PARTICIPATION SURVEY: STATE AND TERRITORY RESULTS, 2020 AUSTRALIA COUNCIL (RESULTS FOR THE EDEN MONARO ELECTORATE WHICH INCLUDES BEGA VALLEY LGA AND , EUROBODALLA LGA AND SEVERAL OTHER LGAs). NOTE SOME PERSONS MAY ATTEND SEVERAL OF THE ACTIVITIES/VENUES.

## Spending by locals

Total spending on arts and cultural experiences by residents was estimated at \$3.815 million in 2020, with \$2.289 million spent in the region and \$1.526 million spent outside the region (Table 10).

**Table 10.** Annual Local Resident Spending – Arts & Creative Activities and Venues (\$ million)

SE Arts LGAs	Art Galleries	Live Music	Performing Arts	Cinema	Total Spending	Total Spending in Area	Total Spending Outside Area
<b>Estimate of Spending by Local Residents (2020)</b>							
<b>Bega Valley LGA</b>	\$0.155	\$0.350	\$0.593	\$0.305	\$1.403	\$0.842	\$0.561
<b>Eurobodalla LGA</b>	\$0.173	\$0.391	\$0.662	\$0.340	\$1.566	\$0.940	\$0.626
<b>Snowy Monaro LGA</b>	\$0.094	\$0.211	\$0.358	\$0.184	\$0.846	\$0.508	\$0.339
<b>Total 3 LGAs</b>	<b>\$0.422</b>	<b>\$0.951</b>	<b>\$1.612</b>	<b>\$0.830</b>	<b>\$3.815</b>	<b>\$2.289</b>	<b>\$1.526</b>
<b>Outside Area</b>	\$0.169	\$0.381	\$0.645	\$0.332	\$1.526		
<b>In Area</b>	\$0.253	\$0.571	\$0.967	\$0.498	\$2.289		
<b>Total</b>	<b>\$0.422</b>	<b>\$0.951</b>	<b>\$1.612</b>	<b>\$0.830</b>	<b>\$3.815</b>		

SOURCE: MCA MODELLING AND ESTIMATES, APRIL 2021

## Visitor market demand

The visitor market is the major market for arts activity in the region. Of the estimated 3.4 million visitors to the region in 2020, it is estimated that 391,800 participated in art and cultural experiences (Table 11).

Of this total 83,000 were estimated to be day visitors and 240,700 domestic overnight visitors (54% intrastate = around 130,000 and 46% interstate = around 110,700). International visitors make up a small percentage accounting for a further 68,000 visitors.

The proportion of visitors received by each local government area is summarised below :

- 30% Bega LGA
- 38% Eurobodalla LGA
- 32% Snowy Monaro LGA



**Table 11.** Estimate of Visitors Experiencing Arts & Cultural Activities (no.)

SE Arts LGAs	Visitors (2020)				Arts & Cultural Experience (2020)				
	Total International	Total Domestic Overnight	Total Domestic Day	International (80%)	Total Domestic Overnight Visitors (12%)	Domestic Overnight Visitors Intrastate	Domestic Overnight Visitors Interstate	Domestic Day (6%)	Total Arts/cultural Experience
<b>Bega Valley LGA</b>	35,000	533,000	430,000	28,000	63,960	34,538	29,422	25,800	117,760
<b>Eurobodalla LGA</b>	32,000	732,000	579,000	25,600	87,840	47,434	40,406	34,740	148,180
<b>Snowy Monaro LGA</b>	18,000	741,000	375,000	14,400	88,920	48,017	40,903	22,500	125,820
<b>Total 3 LGAs</b>	<b>85,000</b>	<b>2,006,000</b>	<b>1,384,000</b>	<b>68,000</b>	<b>240,720</b>	<b>129,989</b>	<b>110,731</b>	<b>83,040</b>	<b>391,760</b>
						<Share 54%>	<Share 46%>		

SOURCES: TOURIST VISITORS – TRA LOCAL GOVERNMENT PROFILES 2019 ; ARTS & CULTURAL EXPERIENCE PERCENTAGES, DOMESTIC ARTS TOURISM CONNECTION THE COUNTRY, AUSTRALIA COUNCIL FOR THE ARTS (P70 & P71). INTERSTATE AND INTRASTATE (P70)

### Spending by Visitors

Total potential spending in the region by arts and cultural visitors was estimated for each of the LGAs and for the region (Tables 12, 13 and 14).

- Total annual spending is estimated at \$272.5 million. (This figure includes spending during their stay e.g. accommodation, food, other retail and well as arts and cultural spending.)
- Domestic Overnight visitors account for \$231.1 million and international visitors for around \$29.9 million.
- Day visitors account for around \$11.5 million.
- Spending on arts product and services only was estimated to be \$55.7 million. (This figure indicates door sales/tickets only)

**Table 12.** All Spending by Arts and Cultural Experience Visitors 2020 (\$million)

Arts & Cultural Experience Visitors (2020)	Total All Spending (\$million)			
	SE Arts LGAs	International Visitors	Domestic Overnight Visitors	Domestic Day Visitors
<b>Bega Valley LGA</b>	\$12.348	\$61.402	\$3.560	\$77.310
<b>Eurobodalla LGA</b>	\$11.290	\$84.326	\$4.794	\$100.410
<b>Snowy Monaro LGA</b>	\$6.350	\$85.363	\$3.105	\$94.819
<b>Total 3 LGAs</b>	<b>\$29.988</b>	<b>\$231.091</b>	<b>\$11.460</b>	<b>\$272.539</b>

SOURCE: MCA ANALYSIS BASED ON VISITOR ESTIMATES

**Table 13.** Spending Mix - Arts and Cultural Experience Visitors 2020 (\$million)

Arts & Culture Visitors Mix of Spending (2020)	International Visitors	Total Domestic Overnight Visitors	Domestic Day Visitors	Total Spending in Region	Shares
<b>Accommodation</b>	\$8.996	\$69.327	\$0.000	\$78.324	28.7%
<b>Food</b>	\$5.998	\$46.218	\$3.438	\$55.654	20.4%
<b>Other Retail</b>	\$8.996	\$69.327	\$4.584	\$82.908	30.4%
<b>Arts &amp; Cultural Charges/Spend</b>	\$5.998	\$46.218	\$3.438	\$55.654	20.4%
<b>Total Spending (Arts &amp; Culture Visitors)</b>	<b>\$29.988</b>	<b>\$231.091</b>	<b>\$11.460</b>	<b>\$272.539</b>	<b>100.0%</b>

SOURCE: MCA ANALYSIS BASED ON VISITOR ESTIMATES

**Table 14.** Visitor Spending on Arts and Cultural Experiences 2020 (\$ million)

Arts & Culture Visitors Arts Spending Only (2020)	Day Visitors	Overnight Visitors	Total Visitors
<b>Bega Valley LGA</b>	\$1.068	\$14.750	\$15.818
<b>Eurobodalla LGA</b>	\$1.438	\$19.123	\$20.561
<b>Snowy Monaro LGA</b>	\$0.932	\$18.343	\$19.274
<b>Total Arts Spending only</b>	<b>\$3.438</b>	<b>\$52.216</b>	<b>\$55.654</b>

SOURCE: MCA ANALYSIS BASED ON VISITOR ESTIMATES

When comparing these potential visitor market spending tables, to the local business survey results, South East Arts businesses were achieving around 16% of this total spending and 12% for arts product only (door sales/tickets) of this potential in the region. The market analysis indicates the potential to capture a larger visitor market if additional arts and cultural product/experiences are available.

## Combined regional local and visitor market demand

It is estimated that in 2020 the estimated participation in arts and cultural activities was 434,000 people – 42,200 locals and 391,800 visitors (Tables 15 and 16).

**Table 15.** Arts and Cultural Market – Locals & Visitors (no.)

Arts & Culture	Locals in Area	Visitors	Total Market
<b>Total Combined Market 2020 (in area)</b>			
Bega Valley LGA	15,510	117,760	133,270
Eurobodalla LGA	17,313	148,180	165,493
Snowy Monaro GA	9,358	125,820	135,178
<b>Total 3 LGAs</b>	<b>42,181</b>	<b>391,760</b>	<b>433,941</b>
<b>Shares (%)</b>	9.7%	90.3%	100.0%

SOURCE: MCA ANALYSIS BASED ON VISITOR ESTIMATES

**Table 16.** Arts and Cultural Market – Spending on Products and Services 2020 (\$ million)

Arts & Culture	Locals in Area	Visitors - All Spending	Visitors- Arts & Culture Spend	Total Market - Arts & Culture Spending
<b>Spending Combined Market (in Area)</b>				
Bega Valley Shire Council LGA	\$0.842	\$77.310	\$15.818	\$16.660
Eurobodalla Shire Council LGA	\$0.940	\$100.410	\$20.561	\$21.501
Snowy Monaro Shire Council LGA	\$0.508	\$94.819	\$19.274	\$19.782
<b>Total</b>	<b>\$2.289</b>	<b>\$272.539</b>	<b>\$55.654</b>	<b>\$57.943</b>

SOURCE: MCA ANALYSIS BASED ON VISITOR ESTIMATES

## Valuing the arts and cultural sector - supply

Table 17 sets out the value of the arts and creative sector in the region. These estimates are designed to be indicative of the scale of the sector in the region. Information on the number of artists, venues and organisations was provided by South East Arts. The annual value of the arts sector in the SE region is around \$45.3 million. These are indicative only and are show the scope and scale of the sector in the South East Region - the supply which is supporting the demand from locals and visitors.

- An estimated \$17.2 million is performing arts related (including music and theatres).
- Visual arts and festivals accounted for an estimated \$31.6 million. (including galleries, artist, and museums \$16.4 million. Festivals \$8.5 million and First Nation artists and organisations \$6.7 million).

These are indicative only and are show the scope and scale of the sector in the region - the supply which is supporting the demand from locals and visitors.

**Table 17.** Supply Side -Value of Arts Sector in South East Region (estimates 2020)

Arts Sector - South East Region	No.	Ave. Annual Revenue/Income 2020\$	Estimated Total Revenue/income 2020\$	
<b>Performing Arts ( inc music, theatre, concerts)</b>				
Music Venues/organisations	35	\$150,000	\$5,250,000	MCA assumption - admission revenue
Musicians	85	\$52,900	\$4,496,500	Australia Council reports
Theatre Venues	6	\$400,000	\$2,400,000	MCA assumption - admission revenue & grants
Group & Performers	35	\$45,000	\$1,575,000	Australia Council reports
<b>Total Music &amp; Performing Arts</b>	<b>161</b>		<b>\$17,221,500</b>	
<b>Visual Arts (inc art galleries, museums, festivals/events)</b>				
Galleries	14	\$500,000	\$7,000,000	MCA assumption - admission & grants, sales
Individual Artists	120	\$47,000	\$5,640,000	Australia Council reports
Museums/Heritage Sites	15	\$250,000	\$3,750,000	MCA assumption - admission revenue & grants
Arts/cultural festival or event	30	\$250,000	\$7,500,000	MCA assumption - admission revenue & grants
Arts/cultural festival or event (survey)	2		\$1,050,000	SE Arts Survey
<b>Arts/cultural festival or event - Total</b>	<b>32</b>		<b>\$8,550,000</b>	
First Nations Artists	45	\$47,000	\$2,115,000	Australia Council reports
First Nations Organisations	7	\$650,000	\$4,550,000	MCA assumption - grants
<b>Total Visuals Arts /festivals/events</b>	<b>233</b>		<b>\$31,605,000</b>	
<b>Total Arts</b>				
<b>Total Arts in SE Region</b>	<b>394</b>		<b>\$45,326,500</b>	

SOURCES: BUSINESSES/ORGANISATIONS – SE ARTS; AVERAGE REVENUE/ARTIST INCOME AUSTRALIA COUNCIL REPORTS & MCA ASSUMPTIONS





CONFLUENCE BY JEN MALLINSON, LITTLETON GARDENS BEGA

## Economic Impact

This section deals with the employment and regional income impacts of arts visitors to the region, measured over a 10-year period based on the SE Arts local business survey, then estimated for the total arts and cultural sector.

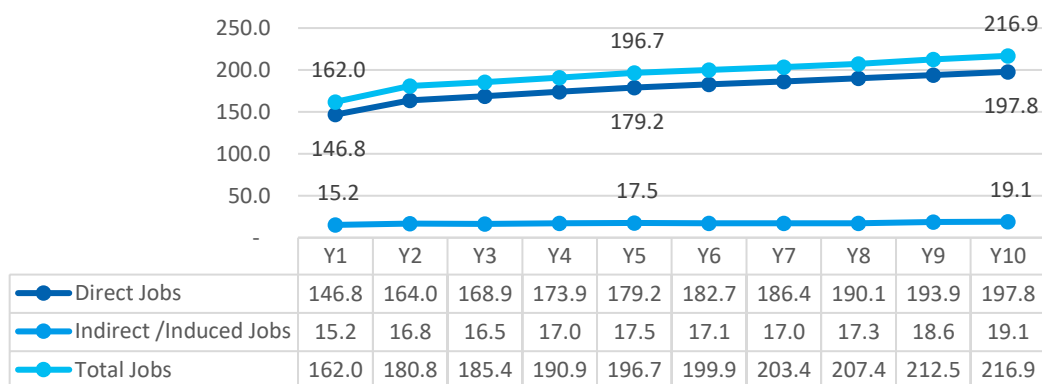
The analysis shows that direct spending on arts products is only a small part of the impact of the arts on the region. One dollar spent on arts products/services/venues was associated with another \$4.70 of spending elsewhere in the region on visitor services and products. This other spending comprises expenditure on accommodation, food, other retail purchases, travel expenses and recreation and other visitor services.

### SE Arts Survey - arts spending impacts

The employment and regional income impacts of arts visitors to the SE region were measured over the 10-year period.

Figure 5 shows the combined total of direct and indirect jobs generated from arts spending at venue and other spending in region. Jobs total 162.0 FTE in year 1 increasing to 216.9 FTE in year 10. Followed by Figure 6 indicating jobs generated by day and overnight visitors. In year 1, day visitors and their spending account for 25.6 FTE jobs and overnight visitors for 136.4 FTE jobs.

Figure 5. Region, Total Jobs Generated by Art Visitors (FTE no.) Jobs



SOURCE FOR BOTH FIGURES: MCA MODELLING & ANALYSIS APRIL 2021.

Figure 6. Region Total Jobs Generated by Arts Visitors (FTE no.) Visitors

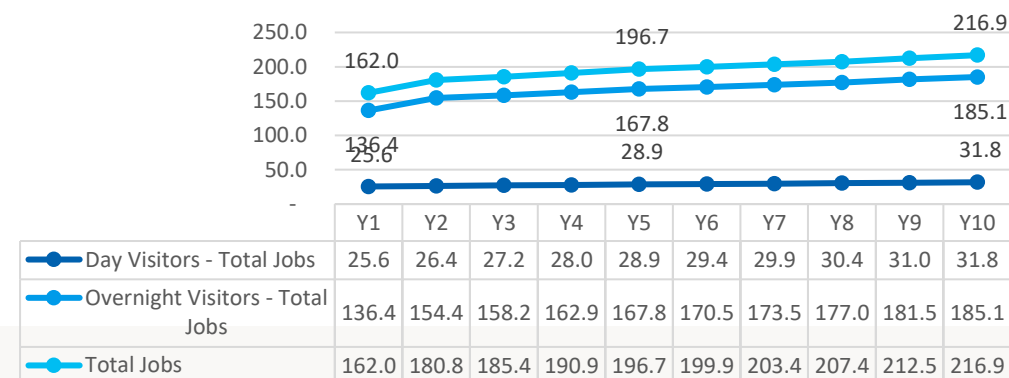


Table 18 shows total jobs generated by arts visitors by industry. The major industries are food service, accommodation, arts services, and recreation and other services and other retail.

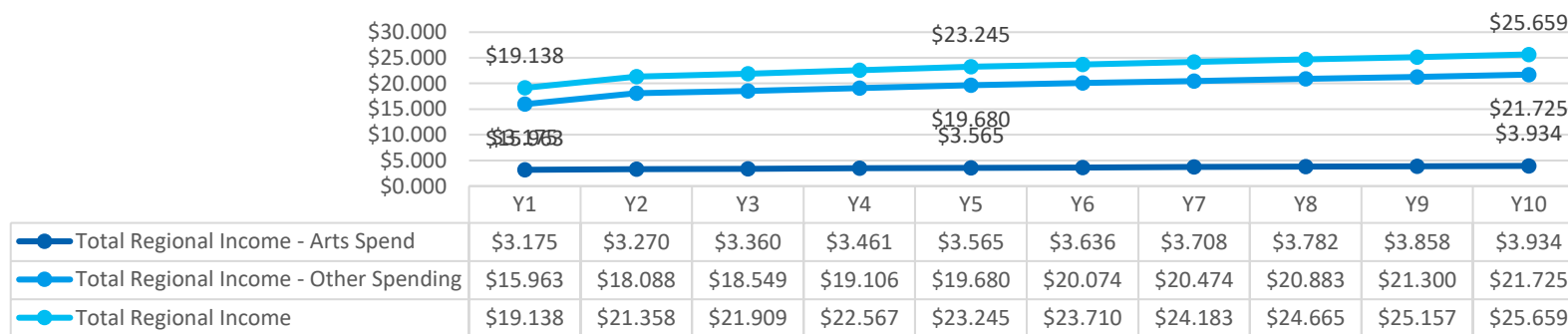
**Table 18.** SE Region Total Jobs Generated by Industry (FTE no.)

Total Jobs Generated	Y1	Y2	Y3	Y4	Y5	Y6	Y7	Y8	Y9	Y10
<b>All Spending</b>										
<b>Accommodation</b>	40.6	46.6	48.0	49.5	50.9	52.0	53.0	54.1	55.1	56.2
<b>Food &amp; Beverage</b>	45.7	51.4	52.8	54.3	56.0	56.9	58.0	59.1	60.5	61.7
<b>Other Retail</b>	16.6	18.1	18.5	19.1	19.6	19.9	20.2	20.6	21.2	21.6
<b>Arts Services</b>	15.4	15.9	16.3	16.8	17.3	17.7	18.0	18.4	18.8	19.1
<b>Recreation Services/Other Services</b>	22.5	25.0	25.7	26.4	27.2	27.7	28.2	28.7	29.4	30.0
<b>Transportation &amp; Other Visitor Services</b>	16.8	18.7	19.2	19.7	20.3	20.6	21.0	21.4	22.0	22.4
<b>Health</b>	1.4	1.5	1.5	1.5	1.6	1.6	1.5	1.6	1.7	1.7
<b>Communication</b>	0.5	0.5	0.5	0.6	0.6	0.6	0.6	0.6	0.6	0.6
<b>Education</b>	0.8	0.9	0.9	0.9	0.9	0.9	0.9	0.9	1.0	1.0
<b>Miscellaneous</b>	1.9	2.1	2.0	2.1	2.1	2.1	2.1	2.1	2.3	2.3
<b>Total</b>	<b>162.0</b>	<b>180.8</b>	<b>185.4</b>	<b>190.9</b>	<b>196.7</b>	<b>199.9</b>	<b>203.4</b>	<b>207.4</b>	<b>212.5</b>	<b>216.9</b>

SOURCE: MCA MODELLING & ANALYSIS APRIL 2021.

In total, spending in the region by arts visitors would boost regional income by around \$19.1 million in year 1 increasing to \$25.7 million in year 10 (Figure 7). The major boost to regional income comes from spending by arts visitors on food, accommodation, other retail and other visitor services.

**Figure 7.** Total Regional Income Generated (\$million 2020 prices)



SOURCE: MCA MODELLING & ANALYSIS APRIL 2021.



## Total region arts and cultural sector – economic impacts

A high-level assessment was made of the total sector using the estimates of the supply and demand side of the sector. (Table 19)

The economic modelling shows that arts and cultural tourism is a growing market for the region, with arts activities having a significant multiplier impact in the South East Region. Every \$1 of direct visitor spending on arts experiences generates another \$4.70 of spending in the region on food, accommodation, purchases, and other visitor services. Arts consumers are a combination of locals, day visitors and overnight visitors.

- Supply side - from our sector analysis arts and cultural activities were valued at \$45.3 million; this implies additional spending of around \$213.2 million and an **overall value of the sector to the region of \$258.5 million to the region.**
- This aligns broadly with the demand side regional market analysis of the cultural tourism which showed a total value to the region of \$272.5 million (arts and creative spending \$57.9 million and other spending \$214.6 million). It indicates some potential for growth in the current market with demand higher than the estimated supply.

**Table 19.** Comparing Supply and Demand - South East Region Arts Sector

South East Region <Jobs -Estimates>	Supply Side Arts Sector Analysis \$ million	Demand Side Regional Market Analysis <Arts & Cultural Tourism> \$ million
<b>Arts and Creative Income/Spending</b> (A)	\$45.3 (B)	\$57.9
<b>Other Spending by Arts Visitors</b>	\$213.2 (C)	\$214.6
<b>Total Value to Region</b>	<b>\$258.5</b>	<b>\$272.5</b>

SOURCE: MCA MODELLING AND ESTIMATES, MAY 2021

(A) ARTS AND CREATIVE SPENDING BY LOCALS, DAY VISITORS AND OVERNIGHT VISITORS TO THE REGION (B) VALUE MEASURED BY REVENUE OF ORGANISATIONS, VENUES AND EVENTS AND INCOME OF CREATIVES (C) BASE ON A MULTIPLIER OF 4.7 DERIVED FROM THE MARKET ANALYSIS AND SE ARTS SURVEY

Arts and cultural visitors are currently generating a significant number of jobs in the region and this will increase with the growth in overall visitor numbers.

Using the supply side estimates the sector would generate a total of around 960 FTE jobs in the region. (Table 20) This comprises 180.3 jobs due to arts spending (163.6 direct jobs and 16.7 indirect /induced jobs in other sectors). Other spending in the region by visitors (day and overnight visitors) generates around 779 jobs (direct and indirect jobs) in other sectors in the region.



**Table 20.** Jobs Generated by Arts Sector in SE Region -Estimates (FTE no.)

South East Region <Estimates>	Supply Side Arts Sector Analysis (no. FTE)	Demand Side Regional Market Analysis (no. FTE)
<b>Arts Spending in Region</b>		
Direct Jobs – Arts Sector	163.6	209.1
Indirect /Induced Job – Other Sectors	16.7	21.0
<b>Total Jobs</b>	<b>180.3</b>	<b>230.1</b>
<b>Other Attendee/ Visitor Spending in Region</b>		
Direct Jobs – Tourist Related Sectors	708.0	712.6
Indirect /Induced Job – Other Sectors	71.3	71.7
<b>Total Jobs</b>	<b>779.3</b>	<b>784.4</b>
<b>Total Spending</b>		
Direct Jobs – Total	871.6	921.7
Indirect /Induced Job – Total	88.0	92.7
<b>Total All Jobs</b>	<b>959.6</b>	<b>1014.5</b>

SOURCE: MCA MODELLING AND ESTIMATES , MAY 2021

**Table 21.** Regional Income Generated by Arts Sector in SE Region - Annual Estimate (\$million)

South East Region <Regional Income - Estimates>	Supply Side Arts Sector Analysis (no. FTE)	Demand Side Regional Market Analysis (no. FTE)
<b>Arts Spending in Region</b>		
Direct Income – Arts Sector	\$15.207	\$19.437
Indirect /Induced income – Other Sectors	\$1.372	\$1.721
<b>Total Regional Income</b>	<b>\$16.579</b>	<b>\$21.158</b>
<b>Other Visitor/ Attendee Spending in Region</b>		
Direct Income – Tourism Related Sectors	\$65.047	\$65.474
Indirect /Induced income – Other Sectors	\$5.831	\$5.866
<b>Total Regional Income</b>	<b>\$70.879</b>	<b>\$71.341</b>
<b>Total Spending</b>		
Direct Income – Total	\$80.255	\$84.911
Indirect /Induced Income – Total	\$7.203	\$7.587
<b>Total All Regional Income</b>	<b>\$87.458</b>	<b>\$92.499</b>

Source: MCA modelling and estimates , May 2021

Table 21 shows estimates for the total sector in the region and income generation. Using the supply side numbers, the arts sector boost annual regional income by \$87.5 million (through arts spending and other spending in by local and visitors).



NAROOMA OYSTER FESTIVAL (IMAGE BEN MARDEN)

## Benchmarking

This section includes a series of case studies to demonstrate the potential value of arts and cultural sectors across regional Australia.

### SUCCESSFUL SOUTH EAST ARTS PRODUCED EVENT

#### Giiyong Festival 2018 Eden, NSW

Giiyong was the first Aboriginal arts and cultural festival in the south-east region of NSW - showcasing and celebrating traditional and contemporary Aboriginal culture.

The festival featured over 100 Aboriginal musicians, dancers, singers, writers and presenters, ranging from professional acts to community groups. Headline acts including Baker Boy, Benny Walker and No Fixed Address were joined by many of the region's local creative talent. This free, family-friendly, alcohol free event welcomed 6000 people in one day, which included many Aboriginal festival goers. The festival provided an important platform for our Aboriginal community locally and nationally to showcase their culture and have their voices heard and respected.

The festival was made possible by utilising several grants, from Indigenous Languages and the Arts, Aboriginal Regional Arts Fund, Incubator Destination NSW, Regional Partnerships (Create NSW), Festivals Australia, Bega Valley Shire Council and others. Donations, philanthropy and sponsorship were all critical to the event's success.

- At any one time there were approximately 2000 people at the site, with a peak from just after lunch to sunset of 3,500 people.
- 30% of the audience travelled more than two hours to attend the event.
- A majority (over 60%) of festival visitors travelled from outside the South East Arts region.
- The direct festival expenditure of \$252K provided economic benefit for various local/regional businesses and individual contractors.
- The broader economic impact of the festival was an additional \$306,000 invested into the local economy by visitors.
- South East Arts (SEA) will partner with Twofold Aboriginal Corporation (Twofold) to deliver three biennial festivals in the future. Over the period, SEA will work with staff from Twofold to develop skills in event management, programming and artist liaison.<sup>19</sup>

Learning: that South East Arts, given funding, can produce an extraordinary event that creates positive community sentiment, attracts visitors, and increases economic investment in the region.



<sup>19</sup> Document supplied by SE Arts and <https://giiyong.com.au/>



## ART TRAILS HELP DRIVE REGIONAL TOURISM

### Silo Art Trail in regional WA

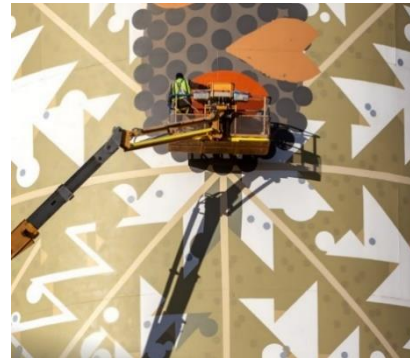
Between 2015 and 2018 and through a partnership with cultural organisation FORM and grain handler CBH Group, six country towns in the Wheatbelt region of Western Australia were painted by internationally acclaimed urban artists.

It was a creative project transforming country infrastructure into sites of world class mural art. Over the past three years the PUBLIC Silo Trail project has created murals on grain silos in Northam, Ravensthorpe, Merredin, Albany, Newdegate and Pingrup, and on public walls and transformer boxes throughout Katanning.

It 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.<sup>20</sup>

- 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.
- 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.
- Silos are a common sight across regional Australia. Painted, they attract visitors to country towns, with visitors altering their driving route to include a town with silo art.<sup>21</sup>

Learning: that a small idea, and leadership, can spark a big change and increase the motivation for travel to regional destinations.



<sup>20</sup> [www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf)

<sup>21</sup> [www.publicsilotrail.com/](http://www.publicsilotrail.com/)



## VISITORS ARE ENGAGING THROUGH SOCIAL MEDIA

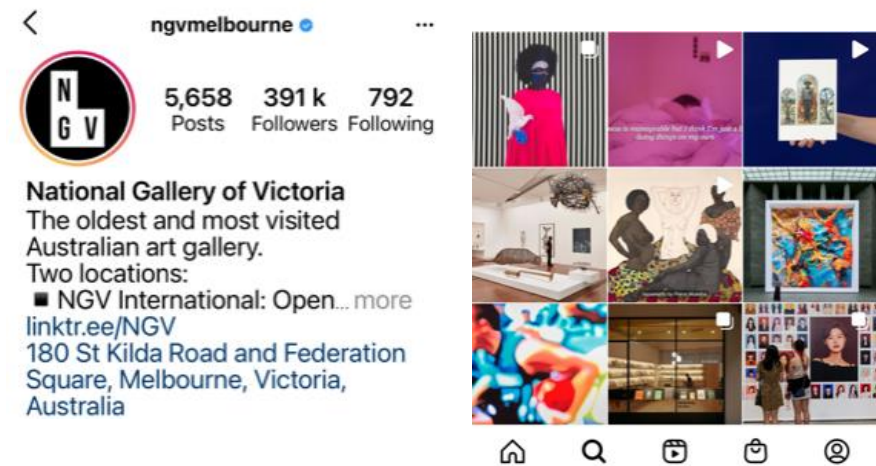
### National Gallery of Victoria and MONA

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.

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.

- 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.
- The most Instagram geotagged location in Tasmania, the Museum of Old and New Art (MONA) has been recognised as a driver of arts tourism in Tasmania since its opening in 2011. Tourism Tasmania's Tasmanian Visitor Survey reported that MONA was the second most popular visitor attraction in the state, behind Salamanca Market, receiving 1.28 million domestic and international visitors for the year ending September 2017. The number of international arts tourists visiting Hobart increased by 92%, compared to the national average increase of 47%.<sup>22</sup>

Learning: the recent 'History and Heritage Museums of the Bega Valley Shire - Sector Survey 2020' highlighted the lack of web presence of these creative businesses with just over three-quarters having a website and one-third do not have onsite internet access. With the research saying that intention to travel to a destination is influenced by social media generated from other visitors to that place, there is an opportunity to improve.



<sup>22</sup> [www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/arts-and-tourism-report-pdf-5bf1f3c5079ac.pdf)

## MAPS FOR FINDING ART EXPERIENCES

### Culture Maps Central NSW- an interactive map

**Bathurst, Blayney, Cabonne, Cowra, Forbes, Lachlan, Lithgow, Oberon, Orange, Parkes and Weddin Local Government Areas.**

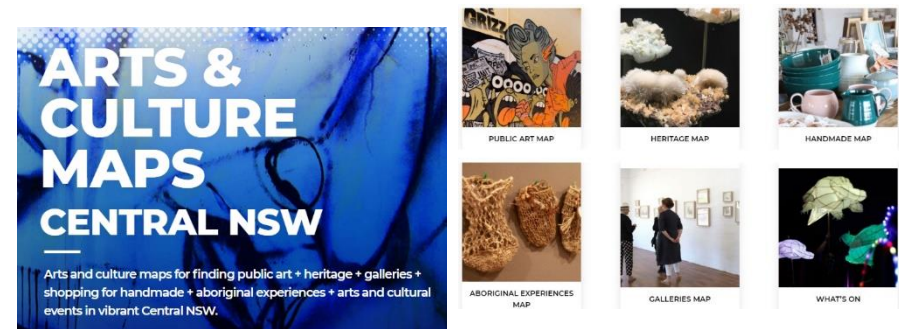
Arts OutWest, the Central NSW Joint Organisation of Councils and Regional Development Australia Central West launched Culture Maps Central NSW – an interactive map that pulls together all arts and cultural experiences across the Central West regions.

The site uses maps and pop-up images to showcase more than 420 pinned places including nearly 300 items of public art (at 220 locations), 130 museums, heritage sites and Aboriginal experiences plus 80 art galleries, artist studios, craft shops and other places to see and buy handmade.<sup>23</sup>

It is a collaborative project of regional arts development organisation Arts OutWest supported by the Central NSW Joint Organisation of Councils and Regional Development Australia Central West.

- Content for the site is drawn from Arts OutWest’s database with assistance from tourism teams at local councils.

Learning: Arts OutWest are very proud of their project and evidence suggests that it has had a positive impact on visitor website hits in their region. The critical learning from their project was to ensure all roles are defined in joint projects and that information is continually updated from a central source. Their close connection to local Councils in their region has meant that they have been able to roll out this joint project with great success.



<sup>23</sup> <http://regionalartsnsw.com.au/2020/09/arts-outwest-launch-culture-maps-central-nsw/> and <https://centralnsw.com/>

## CONTRIBUTING TO RESILIENT LOCAL ECONOMIES

### Wangaratta Performing Arts Centre VIC

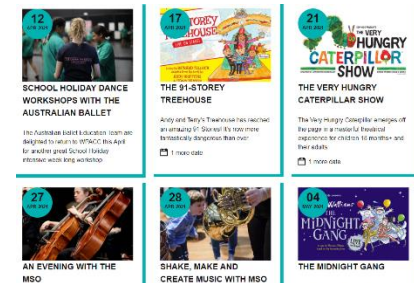
Investment in cultural infrastructure and events contributes to local economies by providing a focal point to attract visitor dollars and help promote a city's image as a cultural destination and by attracting highly skilled and educated workers to communities.<sup>24</sup>

The Wangaratta Performing Arts Centre opened in 2009, with a construction cost of \$8.5 million and provides a professional performing arts facility. An economic impact assessment of the centre found:

- The centre has generated significant additional economic activity in the region.
- Regional visitation has increased by approximately 5,200 persons per year associated with arts performances, conferences and events.
- As a consequence, regional visitor spending has increased by around \$1.6 million (direct and indirect) per year, benefiting a wide range of regional businesses.
- The capital cost of the new centre was repaid, from additional economic activity in the region by the end of 2014, which is just over five years after completion.

- The increased economic activity has resulted in additional employment of 19.5 equivalent fulltime staff, including 2.75 directly associated with the facility, and the balance involved indirectly through suppliers and visitor spending.
- The study also identified a significant increase in volunteer levels (in comparison with the old venue) with volunteer hours increasing over tenfold from the predevelopment.

Learning: investment in infrastructure can drive new tourism markets into regions and provide significant additional economic activity in regions.



<sup>24</sup>

[https://creative.vic.gov.au/\\_\\_data/assets/pdf\\_file/0010/56359/The\\_Arts\\_Ripple\\_Effect\\_Valuing\\_the\\_Arts\\_in\\_Communities-2.pdf](https://creative.vic.gov.au/__data/assets/pdf_file/0010/56359/The_Arts_Ripple_Effect_Valuing_the_Arts_in_Communities-2.pdf)

## UNEXPECTED SUCCESSES

### Clunes Booktown Festival

Clunes Booktown Festival is an annual book-selling and literary festival held in the historic goldmining town of Clunes in Victoria. It is modelled on the successful European concept of “Booktowns” with bookselling as their core theme.

- With agricultural and manufacturing decline, drought and population loss had all taken their toll on the Clunes with mostly vacant shops on its main street.
- The first festival was held on a single day in 2007 and attracted about 6,000 people, way beyond the town’s expectations. The town ran out of money, food and even electricity.
- Seven years later Booktown has expanded to a weekend event attracting close to 20,000 visitors.
- Only one bookstore existed prior to 2007 and Clunes now draws 50 book traders for the festival, with eight book traders permanently based in town and two on-line book traders.
- Other signs of growth are installation of an ATM, re-opening of the Clunes railway station and redevelopment of the Clunes Museum into a community and information centre.
- A survey of residents found strong support for the festival, with 99% of respondents agreeing that the promotion of Clunes is the event’s greatest economic benefit.

- 84% of residents surveyed believed that Booktown was beneficial in securing the long-term future of Clunes through promotion of the town, attraction of visitors, economic benefits, sense of a positive future and community spirit.
- Local support for the event is also demonstrated the high proportion of local volunteers – 42% of residents indicated they had volunteered at the event.

In 2012 Clunes was recognised as the southern hemisphere’s first international book town. The designation has been given to only 15 towns worldwide.<sup>25</sup>

Learning: small niche ideas can boom into successful events that benefit residents and local businesses, and generate word of mouth promotion.



**From Slow, Dusty And Dry To A Hub Of Ideas And The Arts.**

The Clunes Booktown Festival is all about celebrating books and the great conversations and big ideas that come from them. The Festival is turning the stereotype of rural towns on its head: from slow, dusty and dry to a hub of ideas and the arts.

<sup>25</sup>

[https://creative.vic.gov.au/\\_\\_data/assets/pdf\\_file/0010/56359/The\\_Arts\\_Ripple\\_Effect\\_Valuing\\_the\\_Arts\\_in\\_Communities-2.pdf](https://creative.vic.gov.au/__data/assets/pdf_file/0010/56359/The_Arts_Ripple_Effect_Valuing_the_Arts_in_Communities-2.pdf) and <https://www.clunesbooktown.com.au/2020/festival-info/>



# Conclusion

## Growing a creative destination

The arts and cultural visitor contribution to the Bega Valley, Eurobodalla and Snowy Monaro area creates benefits that ripple throughout the regional economy. Every \$1 of direct visitor spending on arts and cultural experiences generates another \$4.70 of spending in the region (spending on food, accommodation, and other visitor services).

The diverse cultural and artistic experiences create jobs. The sector is an employer, producer, and consumer and provide a great visitor experience as well as delivering a more liveable environment for residents.

Arts and culture related businesses in the region have proven themselves to be a vital part of the region's economic ecosystem. This interrelationship is essential not only stimulating the economy, but expanding the region's reputation as a destination, a place to both see and experience.

Arts experiences have a growing role as a driver for tourism and are increasingly part of visitor itineraries. Visitors connect with the arts as they travel around South East NSW, whether on short daytrips or longer overnight stays. From large scale festivals and events, to visits to artist workshops and studios, the arts also draw domestic visitors across the region, providing opportunities to share local creativity and culture with visitors.

Documenting the value of arts to the regional visitor economy in South East NSW is an important step to develop an understanding of how arts venues and events contribute to local businesses and how each event can work with local business to maximise that impact through combine marketing efforts and service provision.

There is an opportunity to grow the arts and cultural tourism market in the region. With opportunities to support those businesses currently offering arts and cultural related experiences to grow, offering new experiences, and encouraging longer visitor stays.

As part of South East Arts Strategic Plan, measurements should be put in place to track the organisations and region's growing awareness as a creative destination. These could include benchmarking:

- Reviewing statistics contained in this report on an annual or bi-annual timeframe.
- Community opinion and satisfaction survey.
- Embedding user evaluation surveys into programs and events (e.g. grants, networking events, major events, skills development programs).
- Tracking the number of creative events and attendance.
- Informal conversations and observation at events.
- Art and cultural industries networking events attendance.
- Number of jobs in creative industries (ABS data).
- Continuing the annual survey of arts and cultural industries.



**NSW**  
TOURISM  
AWARDS  
**2019**  
FINALIST



GIIYONG FESTIVAL, JIGAMY 2018 (IMAGE DAVID ROGERS)

David Rogers  
PHOTOGRAPHER



## APPENDIX A – IMPACT OF THE ARTS

More Australians now recognise the many positive impacts the arts have on our daily lives and in our communities.

### Attitudes to the arts

In line with national trends, more NSW residents now believe the arts have a ‘big’ or ‘very big’ impact on:

- Shaping and expressing Australian identity (55% in 2016, up from 48% in 2013)
- Their ability to think creatively and develop new ideas (66%, up from 60%)
- Their sense of wellbeing and happiness (57%, up from 52%). • T
- Two in three NSW residents believe the arts have a ‘big’ or ‘very big’ impact on stimulating their minds (67%) and our understanding of other people and cultures (63%).<sup>26</sup>

Australians believe that the arts reflect and contribute to society, to identity and to Australia’s international reputation. The arts give life meaning and Australians are proud of their artists.

Around three in four NSW residents agree that:

- First Nations arts are an important part of Australia’s culture (79%)
- Artists make an important contribution to Australian society (77%)
- They feel proud when Australian artists do well overseas (75%)
- The arts make for a richer and more meaningful life (73%)
- The arts in Australia reflect the diversity of cultures present in Australia (73%)
- The arts are an important way to get different perspectives on a topic or issue (72%)

<sup>26</sup> [www.australiacouncil.gov.au/workspace/uploads/files/naps\\_\\_nsw-highlights\\_14-july-596938ee3ffa2.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/naps__nsw-highlights_14-july-596938ee3ffa2.pdf)

### Giving to the arts

The high value that regional Australian’s place on the arts is reflected in the time and money they give to support artists, arts organisations, and arts projects.

- 1 in 4 regional Australians gave their time or money to the arts in 2016 (27%), on par with metropolitan Australians.
- One in four NSW residents give time or money to the arts (27%), with 15% of NSW residents volunteering in the arts or helping artists or community groups with arts activities.<sup>27</sup>

### Arts attendance

Attending arts experiences in person enables Australians to come together as audiences and connect with artists in unmediated ways. Three in four NSW residents attend the arts, with more than half 56% attending a live music event, 45% attending visual arts; 41% attending the theatre; 33% attending dance; and 20% attending literature events. Almost half of NSW residents attend arts festivals (47%).

<sup>27</sup> [www.australiacouncil.gov.au/research/regional-arts-summary/](http://www.australiacouncil.gov.au/research/regional-arts-summary/)

## APPENDIX B – SOUTH EAST ARTS SURVEY ADDITIONAL INFORMATION

This appendix provides some results from the survey of arts organisations. A total of 11 organisations completed the online survey. The following tables show some key results, with business names removed.

### Attendance – Venues and Events

The survey results show a total of 127,407 persons attended facilities or venues in 2019. This was up from 117,311 in 2018. However, the Eurobodalla Shire Council gallery - The Bas did not open until 2019 and in addition the South East Arts - Giiyong Festival was held in 2018 and not 2019.

Total visitors were 97,257 in 2017 and 117,311 in 2018. Activities did not occur in 2020 due to covid-19 restrictions.

Visitors in 2019 were evenly divided between day visitors (64,683 or 50.8%) and overnight visitors (62,774 or 49.2%).

Attendance 2017-2019 (no.)

Attendance	2019	2018	2017
<b>Venue 1 – note business names are confidential</b>	6,000	5,000	5,000
<b>Venue 2</b>	15,000	22,000	12,000
<b>Venue 3</b>	1,200	1,200	1,200
<b>Venue 4</b>	2,000	1,800	500
<b>Venue 5</b>	50,329	48,708	47,289
<b>Venue 6</b>	8,000	7,500	6,700
<b>Venue 7</b>	<b>18,450</b>	-	-
<b>Venue 8</b>	23,700	22,600	21,800
<b>Venue 9</b>	<b>600</b>	<b>600</b>	<b>600</b>
<b>Venue 10</b>	-	5,500	-
<b>Venue 11</b>	<b>2,128</b>	<b>2,403</b>	<b>2,168</b>
<b>Total</b>	127,407	117,311	97,257

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021



Attendance 2019 by Type of Visitor (no.)

Attendance	2019	Day Visitors	Overnight Visitors
Venue 1 – note business names are confidential	6,000	2400	3600
Venue 2	15,000	10500	4500
Venue 3	1,200	960	240
Venue 4	2,000	1600	400
Venue 5	50,329	20,132	30,197
Venue 6	8,000	6400	1600
Venue 7	18,450	7380	11070
Venue 8	23,700	14220	9480
Venue 9	600	240	360
Venue 10	Not held	0	0
Venue 11	2,128	851	1277
<b>Total</b>	<b>127,407</b>	<b>64,683</b>	<b>62,724</b>
<b>Share (%)</b>		<b>50.8%</b>	<b>49.2%</b>

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021

## Where are the visitors from?

For 2019, around 35% of visitors (44,399) were from the local area; around 11% from ACT (13,374) and 15% from Sydney (18,496). Further afield - 8% (10,170) were from other NSW locations; 16% from Victoria (20,333); 8% other interstate (10,188); and 8% international visitors (10,518).

Residence Location of Visitors 2019 (no.)

Residence of Visitors	2019	Local						
		3 LGAs	ACT	Sydney	Other NSW	VIC	Other Interstate	International
<b>Venue 1 – note business names are confidential</b>	6000	600	900	1200	2100	600	0	600
<b>Venue 2</b>	15000	7500	1500	1500	1500	1500	750	750
<b>Venue 3</b>	1200	300	240	180	300	60	60	60
<b>Venue 4</b>	2000	200	200	400	400	400	300	100
<b>Venue 5</b>	50329	5033	5033	10066	0	15099	7549	7549
<b>Venue 6</b>	8000	4800	800	400	800	400	400	400
<b>Venue 7</b>	18450	11993	1845	923	923	923	923	923
<b>Venue 8</b>	23700	13035	2370	3555	3555	1185	0	0
<b>Venue 9</b>	600	300	60	60	60	60	30	30
<b>Venue 10</b>	Not held	0	0	0	0	0	0	0
<b>Venue 11</b>	2128	638	426	213	532	106	106	106
<b>Total</b>	<b>127,407</b>	<b>44,399</b>	<b>13,374</b>	<b>18,496</b>	<b>10,170</b>	<b>20,333</b>	<b>10,118</b>	<b>10,518</b>
<b>Shares</b>		<b>34.8</b>	<b>10.5</b>	<b>14.5</b>	<b>8.0</b>	<b>16.0</b>	<b>7.9</b>	<b>8.3</b>

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021

## Staffing

### Employees & Volunteers

The organisations had limited staff and made a substantial use of volunteers, particularly for the festivals and other events. In total the organisations had only 34 staff (24 casuals, 5 full time workers and 5 part time workers).

Staff & Volunteers Employed 2019 (no.)

Staffing 2019	Staff - FT	Staff-PT	Casuals	Volunteers
Venue 1 – note business names are confidential	0	0	0	15
Venue 2	1	0	2	32
Venue 3	0	0	4	30
Venue 4	0	0	3	15
Venue 5	3	0	5	50
Venue 6	0	0	0	95
Venue 7	0	2	0	15
Venue 8	0	0	4	90
Venue 9	0	1	0	36
Venue 10	1	2	5	100
Venue 11	0	0	1	350
<b>Total</b>	<b>5</b>	<b>5</b>	<b>24</b>	<b>828</b>

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021

## Volunteers

Most organisations are dependent on volunteers to continue operations. In the absence of volunteers, most of the organisations would not be able to function. Volunteers are particularly important for the festivals and events.

Volunteers and Hours (annual)

<b>Volunteers 2019</b>	<b>Volunteers (no.)</b>	<b>Total Volunteer Hours ( annual 2019)</b>	<b>Average Hours per volunteer (annual)</b>
<b>Venue 1 – note business names are confidential</b>	15	10,080	672
<b>Venue 2</b>	32	1440	45
<b>Venue 3</b>	30	300	10
<b>Venue 4</b>	15	1200	80
<b>Venue 5</b>	50	250	5
<b>Venue 6</b>	95	1100	12
<b>Venue 7</b>	15	1965	131
<b>Venue 8</b>	90	4500	50
<b>Venue 9</b>	36	25	1
<b>Venue 10</b>	100	200	2
<b>Venue 11</b>	350	14,000	40
<b>Total</b>	<b>828</b>	<b>35,060</b>	<b>1047</b>

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021



## Revenue and expenses

The following are estimates of revenue and costs. The survey required answers in range, we have estimated the dollar values within the range for each organisation. Overall it suggests that for the 11 organisations combined, operating costs are broadly in line with annual revenue.

Estimated Revenue and Expenses 2019 (\$)

Organisation	Operations 2019									Total Cost
	Revenue 2019	Facilities /Venue Costs	Staff Costs	Events/ Production	Admin / management - Cost	Marketing / promotion cost	Program costs	Artist fees	Other Costs	
<b>Venue 1 – note business names are confidential</b>	\$600,000	\$25,000	\$50,000	\$50,000	\$25,000	\$25,000	\$25,000	\$100,000		\$300,000
<b>Venue 2</b>	\$50,000	\$30,000			\$12,500	\$5,000				\$47,500
<b>Venue 3</b>	\$40,000	\$40,000	\$65,000	\$20,000	\$15,000	\$15,000	\$15,000	\$15,000		\$185,000
<b>Venue 4</b>	\$175,000			\$60,000	\$40,000	\$15,000	\$60,000	\$40,000	\$15,000	\$230,000
<b>Venue 5</b>	\$90,000	\$15,000			\$12,000	\$15,000		\$20,000	\$15,000	\$77,000
<b>Venue 6</b>	\$400,000	\$15,000		\$200,000	\$20,000	\$12,500	\$10,000	\$90,000		\$347,500
<b>Venue 7</b>	\$25,000	\$7,500	\$15,000	\$7,500	\$10,000	\$7,500	\$7,500	\$10,000		\$65,000
<b>Venue 8</b>	\$65,000	\$10,000		\$15,000	\$10,000	\$15,000	\$12,500	\$15,000		\$77,500
<b>Venue 9</b>	\$400,000	\$200,000	\$250,000	\$40,000	\$40,000	\$20,000				\$550,000
<b>Venue 10</b>	\$25,000	\$5,000	\$10,000	\$10,000	\$7,500	\$5,000	\$7,500	\$7,500		\$52,500
<b>Venue 11</b>	\$175,000			\$25,000	\$25,000	\$25,000			\$25,000	\$100,000
<b>Total</b>	<b>\$2,045,000</b>	<b>\$347,500</b>	<b>\$390,000</b>	<b>\$427,500</b>	<b>\$217,000</b>	<b>\$160,000</b>	<b>\$137,500</b>	<b>\$297,500</b>		<b>\$2,032,000</b>
<b>Share of Costs (%)</b>		17.1	19.2	21.0	10.7	7.9	6.8	14.6		100.0
<b>Share of revenue (%)</b>		17.0	19.1	20.9	10.6	7.8	6.7	14.5		99.4

SOURCE: SE ARTS SURVEY - MARCH/APRIL 2021





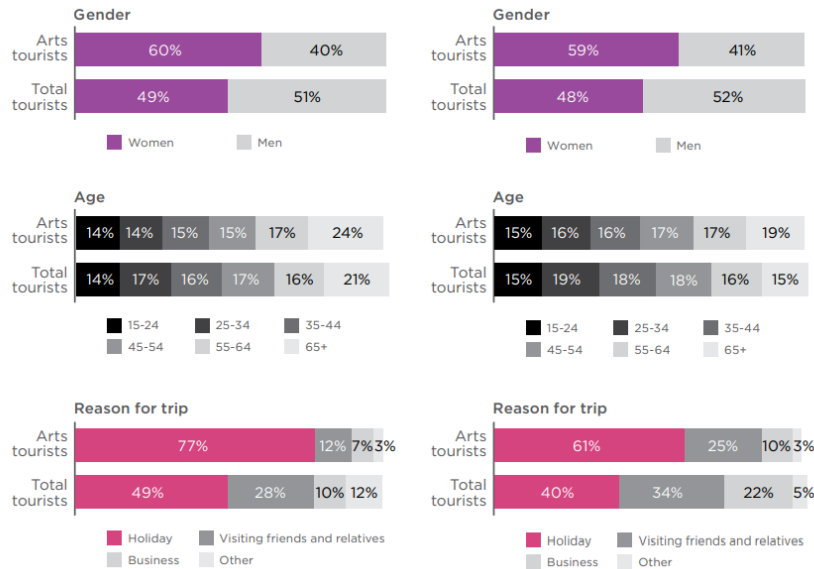
MIKELANGELO AND THE BLACK SEA GENTLEMEN, FOUR WINDS PAVILION (IMAGE BEN MARDEN)



## APPENDIX C – DOMESTIC ARTS AND CULTURAL VISITOR PROFILE

A domestic arts and cultural visitor is defined as a resident of Australia who did at least one of the following while on a daytrip or overnight trip within Australia: attended theatre, concerts, or other performing arts; visited museums or art galleries; visited art or craft workshops or studios; attended festivals, fairs or cultural events or experienced First Nations art, craft and cultural displays.<sup>28</sup>

Nationally, domestic arts and cultural visitors are similar in profile to the average domestic visitor.<sup>29</sup>

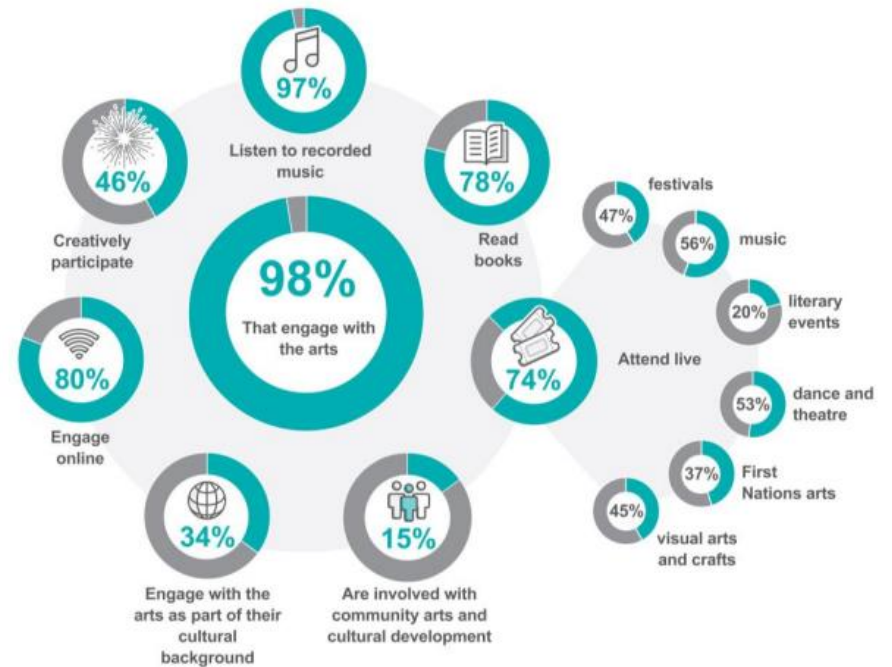


<sup>28</sup> [www.australiacouncil.gov.au/research/domestic-arts-tourism-connecting-the-country/](http://www.australiacouncil.gov.au/research/domestic-arts-tourism-connecting-the-country/)

<sup>29</sup> [www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf](http://www.australiacouncil.gov.au/research/wp-content/uploads/2020/02/Domestic-Arts-Tourism-research-report-PDF.pdf)

## NSW residents' art engagement<sup>30</sup>

The 2016 National Arts Participation Survey found that Australians increasingly believe the arts are critical to social cohesion – the arts reflect Australia's diversity; shape and express identity; and create empathy, understanding and connection.



<sup>30</sup> [www.australiacouncil.gov.au/workspace/uploads/files/naps\\_nsw-highlights\\_14-july-596938ee3ffa2.pdf](http://www.australiacouncil.gov.au/workspace/uploads/files/naps_nsw-highlights_14-july-596938ee3ffa2.pdf)

## APPENDIX D – TOURISM RESEARCH AUSTRALIA DATA

### Domestic overnight art and cultural visitors

Visitation is broken-down to individual LGA level, and a combined figure is shown indicating the region that SE Arts oversees. All figures are based on 4-year averages, and the data below is the annual figure for the year ending Dec 2016 to Dec 2019 averages.<sup>31</sup> For all domestic overnight art and cultural visitors to the region, total spend was \$171 million staying an average of 4 nights.

- The majority of visitors came from intrastate (126,000), followed by 55,000 VIC and 50,000 ACT.
- 151,000 were female, 98,000 male
- Domestic nights were overwhelmingly for holiday purposes 839,000 followed by Visiting Friends and Relatives 178,000
- Visitor ages were evenly split between 35-44 / 45-54 ages groups (180,000+ each) followed by over 70 (156,000) and 65-69 (127,000)

<sup>31</sup> Tourism Research Australia (TRA) data request report. Four-year average YE Dec 2016-YE Dec 2019

Domestic Visitors, Nights and Spend in region

	Combined	Bega LGA	Eurobodalla LGA	Snowy Monaro LGA
<b>Visitors</b>	249,000	109,000	79,000	64,000
<b>Nights</b>	1,041,000	466,000	335,000	241,000
<b>Average Nights</b>	4	4	4	4
<b>Expenditure</b>	\$171 million	\$75 million	\$46 million	\$50 million
<b>Spend per trip</b>	\$688	\$684	\$588	\$779
<b>Spend per night</b>	\$164	\$161	\$139	\$208

### Domestic day art and cultural visitors

Data is only publishable for the combined region, indicating that there was an average of 84,000 art visitors, who spent over \$11million (\$131 spend per trip) in the region.

### International art and cultural visitors

International visitors came from 58 countries, with the majority 9,000 each from the USA and UK, followed by Germany (7,000) and China (4,000) and NZ, Canada and Italy (3,000).



### International Visitors, Nights and Spend in region<sup>32</sup>

	Combined LGAs	Bega LGA	Eurobodalla LGA	Snowy Monaro LGA
<b>Visitors</b>	58,000	28,000	25,000	14,000
<b>Nights</b>	388,000	121,000	92,000	176,000
<b>Average Nights</b>	7	4	4	13
<b>Expenditure</b>	\$25 million	\$8 million	\$8 million	\$9 million
<b>Spend per trip</b>	\$428	\$280	\$314	\$642
<b>Spend per night</b>	\$63	\$65	\$86	\$50

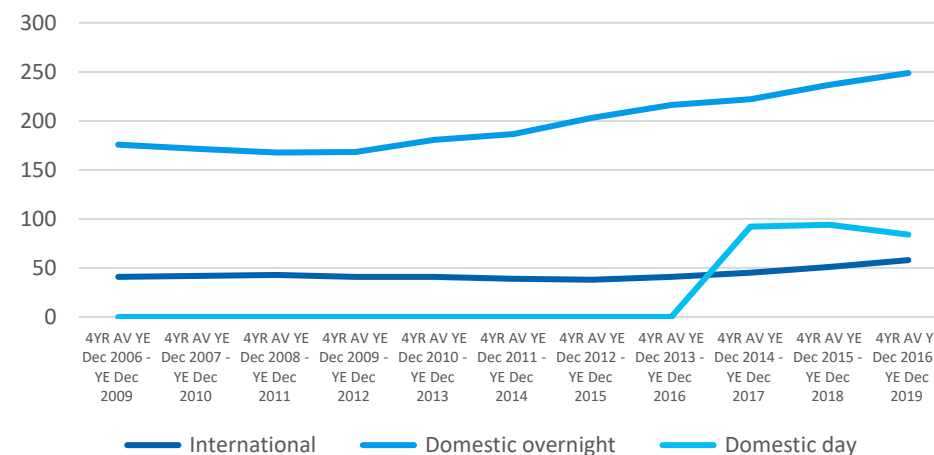
International visitors came from 58 countries, with the majority 9,000 each from the USA and UK, followed by Germany (7,000) and China (4,000) and NZ, Canada and Italy (3,000)

### Art and cultural visitor trends

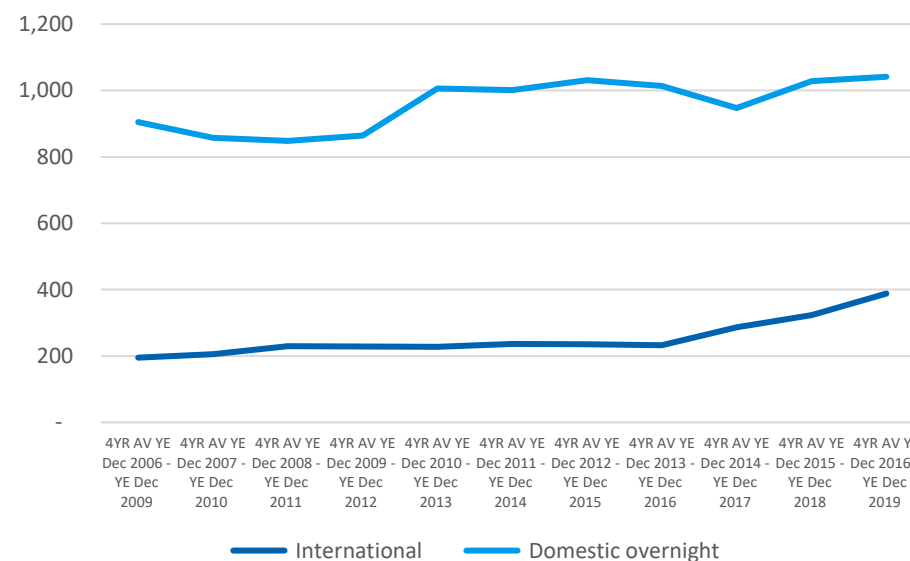
Across the region, there have been increase in art and cultural visitation especially in the domestic overnight visitors.

<sup>32</sup> Tourism Research Australia (TRA) data request report. Four-year average YE Dec 2016- YE Dec 2019

**Figure 8.** Art and Cultural Visitors (000)



**Figure 9.** Art and Cultural Nights (000)



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