Demand and Supply Issues in Indigenous Tourism: A Gap Analysis

FINAL REPORT

Mapping Australia's International and Domestic Visitor Markets against Indigenous Tourism Operators

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Executive Summary

Indigenous tourism is an integral part of Australia's tourism product offering; Indigenous tourism is one of the key experiences which underpin Tourism Australia's global marketing activities. Yet participation in Indigenous tourism experiences by both international and domestic markets has been declining since 2006 (Tourism Research Australia 2011). Despite conflicting reports pertaining to the success (or otherwise) of Indigenous tourism in Australia, certainly the demand and interest for Indigenous tourism reported in earlier demand studies has not transpired into visitor flows for many Indigenous tourism businesses. Therefore, the aim of this research was to undertake a gap analysis of the demand for, and supply of, Indigenous tourism in Australia through the following specific research objectives:

Stage One: Map the International and Domestic Visitor Markets against Indigenous Tourism Operators

1. Investigate the expectations, experiences and motivations, of both international and domestic tourists regarding Indigenous tourism products and services in Australia.
2. Investigate the expectations, experiences and motivations of Indigenous tourism operators regarding the provision of activities and experiences to the visitor market.
3. Undertake a gap analysis of the expectations, experiences and motivations of international and domestic tourists and Indigenous tourism operators to analyse and map identified gaps and associated emergent issues.

Multiple data collection methods were used to address the research objectives of Stage One of the research and included:

1. A survey with 1357 international and domestic tourists conducted at four locations in Australia.
2. In-depth, semi-structured interviews with 34 Indigenous tourism operators from 10 locations in Australia.

A second stream of research was also undertaken and focused specifically on the Chinese inbound visitor market and their demand for Indigenous tourism in Australia. This is the first empirical research that has been undertaken to explore Chinese awareness, preferences and demand for Indigenous tourism. The research objectives of this stage of the research were to:

Stage Two: Chinese Inbound Market Study

1. Investigate the expectations, experiences and motivations of independent Chinese tourists regarding Indigenous tourism products and services in Australia.

2. Explore the relative demand for Indigenous tourism products and experiences of Chinese tour group participants in Australia.
3. Investigate the perceptions, expectations and decision making processes of Chinese inbound tour operators and Chinese market expert informants regarding Australian Indigenous tourism products and services.
4. Undertake a gap analysis of the expectations, experiences and motivations of Chinese tourists, tour operators, expert informants and Indigenous tourism operators to explore and then map and critically analyse identified gaps and associated emergent issues.

Again, a mixed method approach was used consisting of surveys with:

1. 115 independent Chinese tourists (conducted as part of Stage One).
2. 275 Chinese tourists travelling with tour groups.
3. 51 Chinese tour operators (Approved Destination Status [ADS] inbound and other tour operators servicing the Chinese market in Australia).
4. 18 expert informants for the Chinese inbound market.

Key Findings Stage One:

- Indigenous tourism operators overestimate international visitor demand for Indigenous experiences. Operators believe international tourists see Indigenous experiences as second only to Sydney attractions, yet less than 5% of international tourists cite Indigenous experiences as an activity they want to experience while in Australia. Operators also overestimate the draw of remote locations such as Uluru and Kakadu when the vast majority of international visitors do not leave the eastern seaboard.
- Mapping awareness, preference and intention on the Attrition Curve shows that despite claims about international visitor interest, the respondents to the visitor survey in this study have low spontaneous/top-of-mind awareness of Indigenous tourism experiences (less than 25% for domestic respondents and less than 20% for international respondents). Preferences for Indigenous tourism experiences decline to 12% and intention/visit to 2%. In this study, awareness and preferences of international visitors are on par with that of domestic tourists.
- It has previously been identified that domestic visitors have little interest in Indigenous tourism; this was confirmed when mapping domestic awareness, preferences and intention on the Attrition Curve. There is low awareness amongst the domestic market that Indigenous tourism experiences are available in Australia. The issue of lack of awareness/product promotion issues arose throughout the study from both visitors and Indigenous tourism operators.

- Barriers to participating in Indigenous tourism were measured on five point scales and most visitor respondents, both international and domestic, rate these around the mid-point. However, given the low awareness, preference and intention scores, this suggests that respondents many not be comfortable disclosing their responses to this question, thus skewing the barriers.
- Many Indigenous tourism operator respondents believe 'racism/negative preconceptions' and 'negative media attention' about Indigenous peoples are barriers to domestic visitor participation in Indigenous tourism. For the international market, operators see the main barrier as 'activity is too expensive/limited budget'.
- The Indigenous activity and experience scenarios, which were designed to delve more deeply into interest and motivations, generally rate on the mid-point of the appeal scale with little differentiation between the options. This suggests that consumers see the product offerings as reasonably homogenous.
- Further, where appeal rates around the neutral point, for those respondents that indicate a level of interest in the scenario, approximately half do not plan to participate/or do not know if they will participate. A lack of time, involvement in other activities, and expensive/budget are repeatedly cited across the scenarios as reasons for not participating in Indigenous tourism.
- Willingness to pay (another indicator of demand), in each of the scenarios is relatively low. Respondents are generally unwilling to pay much for these experiences generally citing 'free' or a willingness to pay up to $100 for the experiences, even for some of the more involved options such as full day tours and accommodation.

Key Findings Stage Two:

- A number of Indigenous tourism operators recognise the importance of the Chinese market and the opportunities it can provide, yet many operators voice a lack of interest in pursuing this market both now and in the near future. Indigenous tourism operators perceived Chinese visitors to Australia to be generally seeking a shallow or 'stereotypical' experience. However, Indigenous tourism operators overestimate Chinese visitor demand for Indigenous tourism products and experiences. Indigenous tourism operators place 'visiting the red centre/ outback' and 'Indigenous tourism' as the two top attractions Chinese visitors want to experience in Australia.
- When mapping Chinese inbound visitor awareness, preferences and intention on the Attrition Curve there is low awareness amongst the Chinese inbound market that Indigenous tourism experiences are available in Australia. Only 6% of Chinese visitors cite Indigenous tourism as a

top of mind activity to undertake Australia compared to over 75% of Chinese visitors who are aware they can undertake ‘outdoor /nature’ experiences.

- The main barriers Chinese visitors cite to participating in Indigenous tourism are a lack of information/advertising/promotion, safety and comfort concerns, and language barriers.
- Inbound tour operators identify barriers and challenges associated with providing Indigenous products and experiences on Chinese tours in Australia including language, cultural barriers, product availability/awareness and standard, timing, pricing, interest, logistics, location and access.
- While acknowledging the market have little prior knowledge of the Indigenous tourism experiences available in Australia, the majority of inbound Chinese tour operators and Chinese expert informants (50% of tour operators and 50% of expert informants) believe experiencing Indigenous art and craft to be very important to Chinese visitors while 59.5% of tour operators and 79% of expert informants believe visiting an Aboriginal site or community is important to Chinese visitors. Yet the most important activities cited by Chinese visitors in Australia include ‘sightseeing/looking around’, ‘visiting the Great Barrier Reef’ and ‘going to the beach’. Indigenous experiences are significantly lower down the importance scale.
- Chinese visitors display an increase in intention to participate when prompted about specific Indigenous tourist scenarios. The most cited motivation for undertaking at least one of the Indigenous scenario experiences is an interest in Aboriginal history, culture and traditions (54%). Importantly however, the most cited barrier to undertaking the scenarios is a lack of interest in the scenarios presented (65%).
- Experiences/products that tour operators and expert informants suggested an Indigenous tourism business could and/or should provide if they wanted to be included in a Chinese tour company’s itinerary included: Aboriginal cultural show; bush tucker/story telling; guided nature/environment tours with Indigenous guide (*maximum one hour*); cultural centres (*where visitors could get a lot of information/experience in a short space of time*); and, art/craft, rock paintings, carvings (*opportunity to try painting*). Further suggestions included: located in close proximity to major cities/urban areas; brochure and interpretation provided in Chinese; souvenir and shopping opportunities.

Recommendations include:

- Explore the knowledge needs of Indigenous tourism operators, as well as the uptake and usage of tourism market data. Develop appropriate communication channels to meet knowledge needs and assist operators in identifying, interpreting and collecting relevant data sources.

- Embed export ready Indigenous tourism products in international and national distribution channels. Integrate micro, small and start-up businesses into local tourism distribution channels to increase product awareness.
- Develop awareness/marketing programs targeted at the domestic market that highlight the range of Indigenous offerings available in Australia. However, it will also be necessary to develop strategies to overcome the low levels of interest and participation in Indigenous tourism.
- Develop a targeted marketing and educational campaign to demonstrate to the broader community, the scope and breadth of Indigenous tourism operations in Australia
- Support Indigenous tourism operators in developing products and experiences that are reflective of contemporary Indigenous culture while balancing visitor demand and expectations.
- Undertake realistic assessments of product gaps vis-à-vis tourist flows and demand patterns thus moving away from supply led, ‘build it and they will come’, approaches to demand driven product development
- Focus on development in urban centres and surrounds to capitalise on existing visitor traffic.
- Develop marketing campaigns to increase awareness of Australia’s Indigenous tourism products; this should be targeted at both visitors and tour operators given the prevalence of group tours in this market.
- Examine an apparent lack of interest from some Indigenous tourism operators to pursue and engage with the Chinese inbound market.

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Chapter One: Introduction

1.1 Background

Tourism is often cited as offering new socio-economic opportunities for Indigenous peoples and communities around the world (Ryan & Huyton 2002; Fuller et al. 2005; Butler & Hinch 2007) through new business development, local employment and increased commercial revenues for the broader host region (Alston 1998; Van de Wagen 2005). In Australia, an emerging interest in Indigenous culture has led to the supply of a range of activities and experiences which are often owned and/or managed by Australia's Aboriginal and Torres Strait Islander peoples. Importantly, Indigenous tourism can be particularly beneficial for the economic development of regional and remote areas and can be used as a stimulus for sustaining declining regional economies and creating enterprises in locations where economic prospects are otherwise limited (Chang 2006; Tourism Australia 2007). Tourism can also provide the opportunity for young Indigenous people to stay on country, and also enable Indigenous communities to showcase their cultures while maintaining and strengthening community identity in their local region (Winters 2009).

Indigenous tourism can be defined as tourism activity in which Indigenous people are directly involved either through control and/or by having their culture serve as the essence of the attraction (Butler & Hinch 2007). Tourism Queensland's definition encompasses activities that; "involve Australian Indigenous people and are sensitive to Indigenous culture. It is not limited to cultural tourism product as it includes mainstream tourism activities and service provision to tourists and the tourism industry" (Tourism Queensland 2004, p. 5). More specifically, Tourism Research Australia (2008) defines an Indigenous tourism 'visitor' as one who participates in at least one Indigenous tourism activity during their trip (i.e., visit to an Aboriginal site or community; experiencing Aboriginal art/craft or cultural display; attending an Aboriginal performance). This participation may be a one-off activity or in addition to other tourism activities.

Indigenous tourism can be considered an integral, albeit niche part of Australia's tourism industry (Whitford & Ruhanen 2010; Hollinshead 1996). In a highly competitive international and domestic tourism market, Australia's Indigenous culture has the potential to provide a key point of differentiation. Therefore throughout Australia, the states and territories are attempting to "…grow Indigenous involvement in the tourism industry to not only capitalise on the potential for the industry to provide wealth creating opportunities for Aboriginal and Torres Strait Islander people but also to expand the tourism product and appeal for domestic and international tourists" (Tourism Queensland 2004, p. 6). The diverse array of Indigenous product offerings that are now being offered across Australia include bushwalks, safaris, staying in Indigenous accommodation for a short period (e.g., 3-10 days), going on a tour with an Indigenous guide, visiting an Indigenous site or community, attending live performances (e.g., dance, drama, music) and appreciating visual arts in State museums and galleries or commercial art and craft enterprises (Tourism Research Australia 2007).

1.2 Review of Previous Research

The following section provides a brief review of previous research that is relevant to the current study. Domestic and international visitor statistics for the Indigenous tourism market are reviewed, as are previous studies that have examined demand and/or supply issues in Indigenous tourism in Australia. A short review of the Chinese inbound visitor market is also provided to set the context for Stage Two of the research.

1.2.1 Indigenous Tourism: Domestic and International Visitor Statistics

While Indigenous tourism is purportedly a key segment of the Australian tourism industry, engagement in Indigenous tourism experiences by both international and domestic markets has been declining since 2006 (Tourism Research Australia 2011). The most recent snapshot of Indigenous tourism visitors in Australia, provided by Tourism Research Australia's International Visitor Survey and National Visitor Survey, shows that in the period between 2006 and 2010 there was an 18.7% average annual decline in domestic overnight Indigenous tourism visitors and a 4.9% average annual decline in international Indigenous tourism visitors. Despite this decline however, in 2010 the combined expenditure of the international and domestic Indigenous tourism markets was AUD$3.8 billion and the international Indigenous tourism segment represented 13% of total international visitors, 20% of total international visitor nights and 19% of total international tourism expenditure (Tourism Research Australia 2011).

Of the international market, European visitors continue to be the strongest segment for Indigenous tourism, comprising 46% of the total international Indigenous tourism market in Australia. This segment however, has declined on average, by 4.9% each year during the 2006-2010 period. Visitors from Asia made up 28% of total international Indigenous tourism visitation in 2010 and tourist numbers for this market also declined on average, 3.7% per year since 2006. Since 2006, other markets showing significant declines in average annual growth include Korea (-18%), Japan (-14%), the United States (-8.8%), and the United Kingdom (-8.7%). In contrast, key markets that demonstrated strong average annual growth were the Asian markets of Indonesia (10%), China (9.4%), India (6.1%), Thailand

(5.6%), while France (5.4%) showed the strongest growth of the European markets (Tourism Research Australia 2011).

The profile of international visitors interested in Indigenous tourism experiences and activities in Australia is different to other visitor segments. For instance, research has shown that this visitor is less likely than other international visitors to spend nights in the capital cities and the Gold Coast (69% compared to 81%), and more likely than other visitors to spend nights in regional areas (31% compared to 19%). During 2010, international visitors participating in Indigenous tourism were over three times more likely than other visitors to stay in backpacker/hostel accommodation (16% of nights compared to 5%) and less likely than other visitors to stay in the home of a friend or relative (20% of nights compared to 30% of nights) (Tourism Research Australia 2011).

Although Tourism Research Australia identified Indigenous tourism visitors as comprising 13% of total international visitors, Nielsen et al. (2008) findings showed that participating in Indigenous tourism is often not regarded as a primary motivator to visit Australia. While there is widespread interest in Indigenous culture, it is not considered a 'must see' attraction or visitors only participate in one Indigenous activity while in Australia (Nielsen et al. 2008). Similarly, of the seven 'experiences' identified by Tourism Australia as having the most potential to encourage international travellers to visit Australia, 'Aboriginal Australia' was generally ranked below 5 (with 1 being the highest). These seven experiences included Aboriginal Australia, Nature in Australia, Outback Australian, Aussie Coastal Lifestyle, Food and Wine, Australian Major Cities and Australian Journeys. Survey results indicated that New Zealand respondents ranked Aboriginal Australia as 7th, US respondents ranked it 7th, UK 5th, French as 4th, German as 5th, Chinese as 6th, Singaporean as 7th, Indian as 5th, Japanese as 5th, Korean as 6th, and Malaysian as 6th (Tourism Australia 2009).

Of the total Indigenous tourism visitor market, domestic visitors represented over 70%. Tourism Research Australia's (2010) profile of the general domestic Indigenous tourism visitor showed that this person is likely to be a female (56%) in the 45-64 years age bracket (45%) and employed either full-time or part-time (66%). Indigenous tourism visitors are also more commonly parents (37%), older non-working (19%) or older working (18%). The most common travel party type for Indigenous tourism visitors is as an adult couple but these visitors also have a propensity to travel in groups, particularly with friends and relatives. The domestic Indigenous tourism visitor seeks information about their trip prior to travel, with the most common information source being the internet (54%). This person is also likely to be travelling for holiday purposes (65%) and prefers to stay in hotels, motels, motor inns and serviced apartments (39%).

1.2.2 Indigenous Tourism: Research Focus on Supply and Demand

Whilst there has been somewhat of an upsurge of interest in Indigenous tourism over the last two decades, there has been only limited research undertaken to assist owners and operators in building a sustainable tourism business. Aside from the international and national visitor surveys, little empirical research has been undertaken on supply and demand issues in Indigenous tourism in Australia. This lack of research has been problematic as many strategies aimed at developing Indigenous tourism in Australia have endorsed a general assumption of high interest or growing demand in Indigenous tourism without explicit or convincing empirical evidence (Tremblay & Wegner 2009). While there has been growth in the development of new Indigenous tourism businesses and tourism products in recent times (Whitford & Ruhanen 2010), Buultjens and White (2008) suggested that many Indigenous businesses find it difficult to achieve sustainability.

1.2.3 Indigenous Tourism: Demand

Research focusing on the demand side of Indigenous tourism product has shown that, from a domestic perspective, Indigenous tourism has low appeal, relative to other Australian experiences (Ryan & Huyton 2000; Jones Donald Strategy Partners 2009). This was found to be due to its limited ability to satisfy key domestic holiday needs of relaxation and indulgence (Jones Donald Strategy Partners 2009). For the domestic market, Indigenous tourism does not spontaneously register as a key domestic travel experience. Ryan and Huyton (2000) proposed that while there is an interest in Indigenous tourism products, often these products are seen as simply a component within a wider cultural and natural context of the Australian tourism experience. Jones Donald Strategy Partners (2009) further claimed that Indigenous tourism in Australia is felt to be mostly inauthentic, clichéd and designed for the international market (Jones Donald Strategy Partners 2009). Accessibility is also seen as a barrier to broader participation (Tourism Research Australia 2010).

While some studies have found Indigenous tourism to have a low appeal relative to other Australian experiences, research by Tourism Research Australia (2010) indicated that a significant proportion of domestic travellers are open to Indigenous tourism experiences. This research found that two-thirds of consumers have previously either considered, or actually taken part in Indigenous tourism activities. Of those who did take part in an Indigenous experience, 87% believed it met or exceeded their expectations.

From their research investigating visitor interest in Aboriginal tourism in the Northern Territory, Ryan and Huyton (2000; 2000a; 2002) reported that tourists, both domestic and international, consistently ranked attractions based on Indigenous culture as being less attractive than other activities. Ryan and Huyton found that while Indigenous tourism experiences were of interest to approximately a third of the visitors to the Territory, the Indigenous tourism experiences were not a major attraction. Additionally, those visitors interested in having an Indigenous experience were not only culture tourists, but also nature and adventure tourists and were therefore also active in seeking a variety of experiences. Ryan and Huyton reported that much of the interest in Indigenous tourism is also confined to certain nationality groups including German, British and North American. Indeed, while visitor monitor surveys of the Northern Territory show that the 'Top End' is strongly perceived as a place where authentic Indigenous culture can be experienced, established tourism products based on Indigenous culture have had a mixed history in attracting visitors. Visitor interest in 'things Aboriginal' has therefore not always translated into high visitor numbers (Ryan & Huyton 2000; Tourism Research Australia 2011a).

It has been suggested that one of the main reasons for a lack of participation in Indigenous tourism by people interested in it, is due to a lack of promotional material required for planning activities. Research showed that between 60 and 80 percent of international visitors who were either interested in experiencing, or had experienced, an Indigenous tourism product believed they had viewed very little advertising (Buultjens & White 2008).

Finally, from a demand perspective with regard to experiences sought and actual visitor interests, currently there is a lack of clear information on what experiences tourists are looking for and in which locations. While there has been some research done in this area, this research was carried out more than ten years ago. This research found high levels of interest in dance performances, guided tours by Aboriginal people and high levels of interest for more opportunity for interaction with Aboriginal people (Pearce et al. 1997).

1.2.4 Indigenous Tourism: Supply

Visitor demand is a challenge for developing sustainable Indigenous tourism businesses in Australia. Compounding this challenge is a range of other supply side factors including access to start up finance and capital and recruiting and retaining appropriately skilled labour (Buultjens & White 2008; Nielsen et al. 2008; Whitford & Ruhanen 2009). Altman and Finlayson (1992) noted specific challenges with respect to Indigenous employment in the tourism industry including requirements for a high level of literacy and communication skills to cope with direct and intensive social interaction with tourists. Further, a lack of requisite skills means that employment opportunities for Indigenous peoples in tourism are often limited to unskilled or semi-skilled positions. There are also substantial differences between regions with regard to Indigenous product offered. For example, there are a number of Indigenous tourism products in Cairns and the surrounding region but there is no product in the Whitsundays region (Nielsen et al. 2008).

Indigenous peoples involved in tourism generally have a positive view of the industry and confidence in their products. A study by Jones Donald Strategy Partners (2009) was undertaken to examine the supply of Indigenous tourism in Australia. The study was commissioned by Tourism Australia [TA] and the Department of Resources, Energy and Tourism [RET]. The objective of the study was to inform strategies for TA and RET to better support the domestic Indigenous tourism market. The study found that due to the volume of positive feedback and word-of-mouth referrals received, suppliers of Indigenous tourism product have confidence in the ability of their product to exceed consumer expectations.

Indigenous tourism operators however, are aware that the domestic market seems to have less interest in Indigenous product and attribute this in part, to racist views. There is a view that an anti-Indigenous element seems to exist within the domestic tourism market because of ignorance or prejudice (Nielsen et al. 2008). Others have suggested that the low demand is due to supply issues, as the product is generally regarded as relatively underdeveloped, with a mismatch between experiences sought and product offered (Buultjens & White 2008). In addition, trade organisations often have concerns regarding product consistency and as such, many are hesitant to include Indigenous tourism activities in their package offers due to a perceived inconsistency in delivery (Jones Donald Strategy Partners 2009).

1.2.5 The Chinese Inbound Market

China is currently Australia's third largest inbound market in terms of visitor numbers (after New Zealand and the UK) (Tourism Research Australia 2012). China is also Australia's fastest growing inbound tourism market in terms of visitor volumes and values and in 2010 it became Australia's highest yielding market, with a total spend of AUD$3.8 billion in 2011. According to the Tourism Forecasting Committee (Tourism Australia 2012), China is expected to be particularly important to the performance of the Australian tourism sector in both the short and long term as China's share of inbound arrivals is expected to increase at a compound annual rate of 11% between 2011/12 and

2015/16. From a Chinese traveller perspective, of the out-of-region outbound destinations, Australia is ranked as the 10th most attractive option (Tourism Australia 2012).

The most recent snapshot of the Chinese inbound market to Australia indicated that 62% of total arrivals travelled to Australia for leisure and 53% of visitors were repeat visitors. Visitors were generally in the 45-59 years age group (30%), closely followed by the 15-29 years age group (29%). Many of the market, 40.8%, booked into a package tour and of these, 92.9% were booked into a group tour. The peak travel period for this market is December to March (Tourism Research Australia 2012). During their time in Australia, the average Chinese visitor spends $7,100 per trip and spends $140 per night. The average length of stay for leisure visitors is 23 days (Tourism Australia 2012; Tourism Research Australia 2012; Tourism Australia 2012a).

Although the Chinese market is not a homogenous market, Tourism Australia (2012b) has provided an overview of the 'average' Chinese long-haul leisure visitor. This visitor is a relatively experienced traveller (almost 70% have travelled outside of Asia in the last 12 months) who has a strong desire to visit Australia's iconic attractions with the Opera House, Great Barrier Reef, kangaroos and koalas being high on their list of 'must sees'. Group travel is generally preferred, particularly when visiting a destination for the first time, however as experience is gained, flexibility in travel options becomes more important. This visitor is inspired and influenced by traditional travel advertising, travel media and word-of-mouth. Neverthless, social media is also becoming increasingly influential. Bookings are still being completed through travel agents; however the internet is important in the research and planning phase.

Research by Tourism Australia (2012b) has also explored Chinese tourists' expectations of a long haul holiday. The Chinese tourist generally expects to experience: a 'difference' to their home environment; a mix of natural environment, culture, history and development together with good products and services for accommodation, eating out, different cuisine options and local shopping; safety; value for money; the ability to see iconic and famous attractions (a major consideration when selecting a destination); accommodation options that include well-known hotel chains and mid-level 3 star hotels; Chinese speaking tour guides; access to Chinese food; direct flights; and local shopping.

While there is limited research into Indigenous tourism visitors from China, data from Tourism Research Australia's International Visitor Survey has shown that Chinese visitors arriving on a travel package were the highest number to experience some form of Indigenous tourism[1]; third behind visitors from the United Kingdom and the United States (Tourism Research Australia 2011).

[1] An Indigenous tourism visitor is defined as a visitor who participates in at least one Indigenous tourism activity during their trip – this may be a one-off activity, or in addition to other tourism activities. The following are examples of Indigenous tourism activities: visit an Aboriginal site or community; experience Aboriginal art/craft or cultural display; attending an Aboriginal performance (Tourism Research Australia, 2011).

Chapter Two: Research Methods

2.1 Purpose of the Study

The aim of this research was to undertake a gap analysis of the demand for, and supply of, Indigenous tourism in Australia. The objective of the study was to address clear and acknowledged research gaps in identifying, understanding and developing strategies for responding to the discrepancies between demand for, and supply of, Indigenous tourism products in Australia. While there has been a number of site specific demand studies of Indigenous tourism in Australia (and overseas) previously, "a common problem…is that the research is often repetitive with a strong emphasis on evaluating visitor expectations and reactions to Aboriginal tourism and most critically, few of the findings from these works are readily available or applied to the practical demands of doing the business of tourism" (Schmiechen & Boyle, 2007, p.61). Utilising a gap analysis approach, this research aimed to map demand side characteristics alongside the voices, experiences and insights of Indigenous tourism operators.

A further addition to the study was the inclusion of a stream of research specifically focused on the Chinese inbound visitor market and their demand for Indigenous tourism in Australia. As noted previously, there has been no empirical research in this area with the exception of the national statistical collections. This stage of the research, while complimentary, has been presented as a standalone component (Stage Two) in the report for ease of reference for the different project stakeholders.

The specific objectives of the study were to:

Stage One: Map the International and Domestic Visitor Markets against Indigenous Tourism Operators

1. Investigate the expectations, experiences and motivations, of both international and domestic tourists regarding Indigenous tourism products and services in Australia.
2. Investigate the expectations, experiences and motivations of Indigenous tourism operators regarding the provision of activities and experiences to the visitor market.
3. Undertake a gap analysis of the expectations, experiences and motivations of international and domestic tourists and Indigenous tourism operators to analyse and map identified gaps and associated emergent issues.

Stage Two: Chinese Inbound Market Study

4. Investigate the expectations, experiences and motivations, of independent Chinese tourists regarding Indigenous tourism products and services in Australia.
5. Explore the relative demand for Indigenous tourism products and experiences of Chinese tour group participants in Australia.
6. Investigate the perceptions, expectations and decision making processes of Chinese inbound tour operators and Chinese market expert informants regarding Australian Indigenous tourism products and services.
7. Undertake a gap analysis of the expectations, experiences and motivations of Chinese tourists, tour operators, expert informants, and Indigenous tourism operators to explore and then map and critically analyse identified gaps and associated emergent issues.

2.2 Research Methods

To examine demand for, and supply of, Indigenous tourism products in Australia, a three phase mixed methodology utilizing a combination of quantitative, qualitative and semi-qualitative techniques was employed. Underpinned by the ethics of Indigenous knowledge research (Sheehan & Walker, 2001) the triangulated research strategy included:

- a survey with international and domestic tourists, and
- in-depth, semi-structured interviews with a sample of Indigenous tourism operators

An additional component was included in the study focusing specifically on the inbound Chinese visitor market and their demand for, and perceptions of, Indigenous tourism. Again, a mixed method approach was used consisting of surveys with:

- independent Chinese tourists
- Chinese tour group tourists

5. Chinese tour operators (Approved Destination Status [ADS] inbound and other tour operators servicing the Chinese market in Australia), and
6. expert informants of the inbound Chinese market.

2.3 Stage One: Map the International and Domestic Visitor Market against Indigenous Tourism Operators

2.3.1 International and Domestic Visitor Survey

Face-to-face surveys were administered to international and domestic visitors in four tourist precincts around Australia. Sampling locations included Sydney, Melbourne, Cairns and Darwin. Sydney and Melbourne were selected as they are the two major international gateways and most visited cities in Australia. These locations provided access to tourists who have participated in Indigenous tourism and also to tourists who have not participated in Indigenous tourism. Cairns and Darwin were identified as two locations which are generally accepted as 'popular' destinations for Indigenous tourism and therefore were expected to provide access to relatively higher populations to sample those visitors that have participated in an Indigenous tourism activity or experience.

Teams of trained data collectors spent three days in each of the four locations over August and September 2012 under the supervision of a member of the research team. The teams consisted of up to eight data collectors working in each of the tourist precinct areas making random approaches to people in the area and inviting them to participate in the study. To ensure data quality and improve response rates, the data collection team was uniformed with University of Queensland shirts and name badges. Show cards were also used to facilitate timely completion of the questionnaires. The necessary permissions were obtained from the respective councils or management authorities in each of the locations. In Sydney, surveys were undertaken in the Sydney Harbour/Opera House/Rocks precincts as well as in Darling Harbour. In Melbourne, surveying took place along Southbank and in Federation Square. In Cairns, surveys were collected in both the Cairns Esplanade and City Place, while in Darwin surveys were collected in the Smith Street Mall.

The questionnaire was developed in SurveyMonkey, an online survey tool that aids the rapid and accurate collection of data. iPads with access to the internet were utilised by the data collectors to access the online survey thereby facilitating the data collection process. The survey was designed to include:

- financial and time scenario questions designed to elicit the relative importance of Indigenous tourism without prompting followed by,
- more specific questions about awareness, past experience, exposure, interest and motivation to participate in Indigenous tourism.

Each survey took approximately 15 to 20 minutes to complete. The survey is included in Appendix 1.

A sample of 1000 respondents was initially sought: 500 international and 500 domestic respondents across the four locations. At the conclusion of the survey, a total of 1357 useable surveys were collected:

- 391 in Sydney
- 303 in Melbourne
- 315 in Cairns
- 348 in Darwin.

The pilot study of the survey instrument revealed that as a result of the length of the survey, some respondents did not answer all questions. Consequently, a series of 'skips' were employed within the survey to ensure valid responses could be collected. Response rates for each of the survey locations are presented in Table 2.1. The main reasons given for not wanting to participate in the survey were:

- not enough time
- don't like surveys
- language barrier
- they were local residents

Table 2.1. Visitor Survey: Sample and Response Rates

	Sydney	Melbourne	Cairns	Darwin	Total
Approaches	561	381	448	445	**1835**
Declines / non-visitors	170	78	133	97	**478**
Valid (following data cleaning)	**391**	**303**	**315**	**348**	**1357**
Answered demographics (complete surveys)	366	267	276	335	**1244**
Response rate	68%	86%	70%	78%	**74%**
Attrition rate (lost during surveying)	6%	12%	12%	4%	**8%**

Respondents were not explicitly made aware at the commencement of the survey that the focus was on Indigenous tourism. Rather, respondents were approached and invited to participate in a study on tourism product development. The objective of doing this was to ensure the integrity of the responses by reducing the likelihood of a bias due to respondents' attitudes and normative beliefs regarding Indigenous tourism.

To facilitate the inclusion of Chinese respondents for the second stage of the study, surveys were undertaken in both English and Chinese. In each survey location, at least two members of the data collection team were fluent in Mandarin. The majority of the responses were collected in English and approximately 8% were undertaken in Chinese[2]. Tourist precincts were selected as the survey locations in each of the cities (Table 2.1).

Analysis of the visitor survey results were undertaken in SPSS and STATA, which are data analysis software. Analysis included descriptive statistics, chi-square tests, t-tests, ANOVAs, and, for a select number of questions, factor analysis and regression. In line with the objectives of the study, the focus of the statistical analysis was on providing comparisons between the domestic and international samples. However, where sample sizes were less than n=25, the results were marked as 'Not Publishable' to ensure validity of the results. There is opportunity to further explore the data using cluster analysis, factor analysis and more advanced regression techniques where sample sizes permit.

2.3.2 Indigenous Tourism Operator Interviews

In-depth, semi-structured, face-to-face interviews were undertaken with a sample of Indigenous tourism operators across Australia. In-depth interviews were deemed most appropriate for this study as they provide a more nuanced understanding of the issues under investigation by providing the opportunity for detailed and reflective answers based on the experience of participants. Moreover, they provided diverse viewpoints and thus deeper insight into issues pertaining to Indigenous tourism in Australia.

In particular, interviews were used to explore:

- motivations, issues and challenges for Indigenous communities and individuals operating in the tourism industry.
- responses to the inherent challenges of a service sector such as tourism.
- meeting visitors' demands and expectations for 'authentic' Indigenous cultural experiences, among others.

Specific questions were also asked regarding the Chinese inbound market to facilitate the gap analysis in Stage Two of the study. The final interview guide is presented in Appendix 2.

[2] The international responses in Chapter 3 are inclusive of the Chinese respondent data. In Chapter 6, the Chinese respondent data has been extracted for further analysis alongside the other data sets for the Chinese market.

To ensure that the interviews were inclusive of the range of issues facing business operators, and importantly the different markets around Australia, interviews were undertaken in a range of tourism locations around Australia: Sydney, Melbourne, Brisbane, Cairns, Townsville, Darwin, Alice Springs, Perth, Broome and Adelaide. All interviews were undertaken by an expert researcher experienced in conducting semi-structured, in-depth interviews.

2.3.3 A Snapshot of the Indigenous Tourism Operator Sample

A sample of up to 30 Indigenous tourism operators was initially sought. The final sample consisted of 34 interviews (Table 2.3). The interviews ranged in duration from 30 minutes to one hour. Potential interview respondents were identified by existing listings such as the *Indigenous Tourism Champions* and business databases previously compiled by the research team (Table 2.4 and Table 2.5).

Table 2.2. Indigenous Tourism Operator Interviews

Location – City and Surrounds	Interviews completed	Response rate
Adelaide	3	60%
Alice Springs	3	50%
Brisbane/Gold Coast	2	40%
Broome	2	40%
North Queensland	7	54%
Darwin	7	88%
Melbourne	4	80%
Perth	2	40%
Sydney	4	58%
TOTAL	34	

Table 2.3. Indigenous Tourism Operator Business Profile

ID	State	Business type	Business structure	Length of operation	No. employees	No. Indigenous employees
1	VIC	Tour	Sole operator	12	1	0
2	NT	Tour	Company	-	25-30	15
3	SA	Booking agent	Company	14	2	0
4	QLD	Tour	Company	35	85	20
5	NT	Community Co-op	Incorporated not-for-profit	25	5	0
6	NSW	Tour/Education	Independent statutory authority	13	7 f/t, 30 cas	1 f/t, 2 cas
7	QLD	Accommodation	Sole operator	18	22	6
8	WA	Gallery	Sole operator	13	2	2
9	NSW	Tour/Community Co-op	Not-for-profit	23	7 f/t, 3 cas	7 f/t, 3 cas
10	WA	Tour	Sole operator	8	1	1
11	QLD	Tour	Company	12	3	3
12	WA	Tour	Sole operator	12	2 f/t, cas	1-2 cas
13	NT	Gallery	Sole operator	14	2 f/t, cas	1
14	QLD	Booking Agent/Tour	Sole operator	7	1f/t, 1p/t, cas	0
15	NT	Accommodation	Sole operator	27	5 f/t, cas	Varies
16	VIC	Gallery/Education	Not-for-profit	6 mo	6	5
17	NT	Gallery/CommunityCoop	Not-for-profit	16	4 f/t, 1 p/t	1
18	NT	Tour	Sole operator	18	1	0
19	QLD	Tour	Independent statutory authority	3 mo	65	60
20	NT	Attraction	Government owned company	15	12	4
21	NT	Tour	Company	14	5-10	0
22	NSW	Gallery	Sole operator	15	-	0
23	SA	Gallery	Not-for-profit	23	3-4	3-4
24	WA	Tour	Community owned	6	6	5
25	VIC	Gallery/Education	Not-for-profit	20	12	6
26	NT	Tour	Sole operator	4	1	1
27	VIC	Tour/Education	Independent statutory authority	15	-	2
28	NT	Tour	Sole operator	13	3FT	0
29	NSW	Tour	Not-for-profit	13	12 f/t, 8 p/t	12 f/t, 8 p/t
30	SA	Gallery/Education	Independent statutory authority	12	-	0
31	QLD	Attraction	Government owned	25	80	55
32	QLD	Tour	Sole operator	10	1	1
33	QLD	Attraction	Publicly listed company	0	-	5
34	QLD	Gallery/Education	Not-for-profit	28	3	2

f/t = fulltime employed, p/t = part-time employed, cas=casual

Table 2.4. Indigenous Tourism Operator Respondent Characteristics

ID	Location	Previous tourism employment/experience
1	VIC	General tourism/hospitality
2	NT	Inbound tour operator
3	SA	Voluntary work
4	QLD	General tourism/hospitality
5	NT	Academic
6	NSW	Business
7	QLD	Resort management
8	WA	Retail
9	NSW	None
10	WA	None
11	QLD	Transport
12	WA	None
13	NT	None
14	QLD	Travel wholesaler, airlines
15	NT	Hotel management
16	VIC	Business
17	NT	Museum curator
18	NT	None
19	QLD	Hotel management
20	NT	Tour operator
21	NT	Tour operator
22	NSW	None
23	SA	None
24	WA	None
25	VIC	Business
26	NT	None
27	VIC	None
28	NT	None
29	NSW	Souvenir artist
30	SA	-
31	QLD	Indigenous dance
32	QLD	General tourism/hospitality
33	QLD	-
34	QLD	Tourism marketing

Visitor numbers per annum varied greatly across the Indigenous businesses that participated in this study. While some businesses reported 200-300 visitors per annum, other businesses received between 1,000 and 5,000 visitors. Further, approximately one third of the Indigenous tourism operations that participated worked with 30,000 up to 1.8 million visitors.

The split of domestic/international visitors to the Indigenous tourism businesses also varied greatly. 14 of the 33 businesses said the international market represented from 10% to 50% of their customer base. Additionally, nine businesses said the international market made up to 90% of their client base. Only four businesses said they received more domestic than international visitors and only one business said their client base was 100% domestic.

In relation to funding for the tourism businesses, 12 operators said they did not receive any funding while seven operators received funding from: Federal and/or State Government departments, agencies and programs including: Indigenous Business Australia; Department of Education Employment and Workplace Relations; Department of Employment, Economic Development and Innovation (QLD), the former Aboriginal and Torres Strait Islander Commission and T-QUAL. Other businesses received funding from the Australia Council for the Arts, Arts NT, Arts SA, and Office for the Arts. The Royalties for Regions, the Small Business Development Corporation WA and Starfish Business Solutions/Tourism Australia were the funding sources for some of the businesses. Participants also identified that philanthropic support was forthcoming.

2.3.4 Interview Methods

Interviews were digitally recorded with the permission of the participant. All participants were provided with a research summary and signed an ethics statement before the interviews commenced. These are included in Appendix 3.

All interviews were transcribed verbatim by a professional transcription service and analysed using manual thematic coding. In-depth interviews generally result in large amounts of rich data and this was certainly the case in this research with 34 in-depth interview transcripts. Criteria for qualitative enquiry: credibility (multiple sources of data), transferability (purposive sampling, interview schedule), dependability (presentation of frequencies alongside quotes in the interview results, independent coding by two researchers) and confirmability (presentation of the participants' own voices) (DeCrop, 2004) were adhered to in the research design.

The interview transcripts were coded using content analysis techniques where the data was analysed through a process of induction then the researcher constructed and reconstructed meaning in the data in relation to the research question (Janesick 2000). A central idea in content analysis is that the many words of the text are classified into much fewer content categories, which may consist of one, several or many words (Weber 1990; Swift 1996). To achieve the objectives of the study, the interview transcripts underwent manifest coding. Singular or multiple words and/or phrases deemed relevant to the study objectives were selected from the transcripts.

Qualitative results are presented for ease of reference in bar charts using frequencies to represent the number of times a particular theme arose during the interviews. Multiple responses were allowed for in the coding so the charts will not sum to 100%.

2.4 Stage Two: The Chinese Inbound Market and Indigenous Tourism

2.4.1 Independent Chinese Tourist Survey

A face-to-face survey was administered by researchers to inbound Chinese tourists in four tourist precincts around Australia: Sydney, Melbourne, Cairns and Darwin. This stage of the research was undertaken concurrently with the international and domestic survey on Indigenous tourism but was undertaken by two Mandarin speaking research assistants. The visitor survey instrument was translated into Chinese for this purpose and iPad survey tools were utilised to facilitate the data collection.

The survey included:

- financial and time scenario style questions designed to elicit the relative importance of Indigenous tourism without prompting followed by,
- more specific questions about past experience, exposure, interest and motivation to participate in Indigenous tourism.

Each survey took 15 to 20 minutes to complete. The survey is included in Appendix 1.

A sample of 500 independent Chinese travellers was initially sought. The final sample achieved was 115 representing 14% of the total international sample. This was in spite of concerted attempts by the data collectors to identify and improve the participation of Chinese tourists.

2.4.2. Chinese Tour Group Survey

Although tour group participants will generally have little influence over their itineraries, tours may be chosen by tourists because of particular attributes and inclusions. Alternatively, tour group participants may have a desire for certain experiences that are not being met. Given this context, and the importance of the package tour market for the inbound Chinese market to Australia, a questionnaire was administered to Chinese tour group participants. The survey was translated and self-completed by participants. The surveys were distributed by data collectors fluent in Mandarin.

The survey was based on the instrument used in Stage One to elicit:

- the relative importance of Indigenous tourism through scenario style questions
- prior knowledge or experience as well as relative interest and motivation to participate in Indigenous tourism in Australia.

These surveys were an abridged version of the larger international and domestic visitor survey discussed previously. Due to the type of respondents sought and the time constraints of tour groups, the survey could be completed in approximately five minutes (Appendix 4). Initially respondents were provided with a small souvenir as a token of thanks for their participation. However, this was discontinued after some problems with the respondents trying to complete multiple surveys to obtain multiple souvenirs, or insisting the data collectors distribute multiple 'thank you' gifts.

A sample of 500 respondents for this survey was sought. The final sample achieved was 275. The original proposal and data collection strategy was budgeted on establishing contacts with Chinese tour operators and requesting their support and permission for researchers to join their tour groups to distribute the survey. However, numerous attempts to gain access to the tour groups via this avenue proved futile, resulting in the need for the research team to conduct the fieldwork in tourist precincts. The very small budget allocated for data collection of Chinese tour groups (originally calculated on distributing surveys to large tour groups simultaneously) meant research teams had to be sent to precincts in Brisbane and the Gold Coast (the location base of the research team). While this approach did generate 275 responses, it was not an ideal approach given the previously noted time constraints of tour groups. Moreover, while some tour guides provided access to their tour groups, others were not willing to allow their tourists to participate in the survey.

2.4.3 Chinese Tour Operator and Expert Informant Survey

The final data set sought for the Chinese inbound analysis was from the Chinese tour operators. Given the high proportion of visitors travelling in tour groups, understanding the perceptions, expectations and decision making process and choices of the inbound tour operators is crucial in investigating the Chinese market's perception of Australia's Indigenous tourism product. Therefore the research design sought to undertake in-depth, semi-structured interviews with a sample of inbound Chinese tour operators. Initially a Mandarin speaking member of the research team made contact with a database of Chinese tour operators, including those on the current ADS list available online. A second database of tour operators servicing the Chinese market in Australia was also compiled. This initial contact was made by telephone and email. Despite numerous attempts to gain access to this market via contacts and colleagues in academia, industry and government, both in Australia and China, the target sample was not responsive to requests to participate in the study. As a result, the research team developed an online survey that covered the same questions that were to be posed in an interview. A total of 78 operators were contacted via email to complete the survey online via Survey Monkey. This strategy elicited only seven responses (Appendix 5).

Support was received from the ADS division of the Department of RET who distributed hard copies of the survey during a training forum with ADS operators on the 27th of November 2012. A total of 44 responses were obtained. Together with those responses received online, a total of 51 Chinese tour operator responses were received.

Prior to receiving the support from RET the research team instigated an additional survey to supplement the responses of the Chinese tour operators. The 'expert informant' survey is targeted at a sample of experienced and knowledgeable experts in the Chinese inbound market. With a response rate of 60%, a total of 18 responses to this online survey were received. The survey was distributed via Survey Monkey (Appendix 6).

2.5 Ethical Considerations

The University of Queensland has strict guidelines relating to ethical approval for research. The University's ethical guidelines were adhered to during all stages of this study. These guidelines extended to the establishment of procedures for the informed consent of research participants, the protection of participant identity, as well as the appropriate management of research findings including data storage and member cross checking.

Participants in the domestic and international visitor survey were read a short ethics statement by the data collectors prior to commencing the survey. All online and hard copy surveys included an ethics statement and the researchers' contact details. Participants in the in-depth interviews were provided with an information sheet to be retained for their record, detailing the nature of the project as well as the contact details of the research should they wish to discuss the project further (Appendix 3). In addition, participants were provided with a consent form, which was signed and returned to the researcher before the interviews began. Participants were also made aware, both verbally and on the consent form, that they were free to withdraw from the study at any time. Moreover, participants were notified and their permission sought for the use of a digital recorder during the interview.

2.6 Research Limitations

Like all research, this study had a number of limitations and delimitations which included:

- Only visitors in the four collection regions were included in the visitor survey sample via convenience sampling in common and acknowledged 'tourist' areas of the cities.
- Targeted efforts were only made to increase the participation of Chinese independent tourists with the use of Mandarin speaking data collectors.
- The research did not account for change in perceptions/visitor type due to seasonality.
- Obtaining access to large samples of Chinese tour group participants was problematic therefore projected sample sizes could not be reached.
- The timeframe in which to conduct and report on the research.
- Subjectivity is an essential part of the interpretive analysis, and the researcher's values and interests and Anglo-Celtic background may have influenced interpretation of the text pertaining to Indigenous peoples.

Stage One:

Mapping the International and Domestic Visitor Markets against Indigenous Tourism Operators

Chapter Three: Results – Visitor Survey

3.1 Demographics and Trip Profile

A total of 1,357 surveys were collected representing: international visitors (n=861; 63%); domestic overnight visitors (n=354; 26%); and domestic daytrip visitors (n= 142; 10%). The gender distribution of respondents was relatively even with 52% male and 48% female. Approximately half of the respondents were aged between 20 to 35 years (Table 3.1).

Table 3.1. Age Groups – All Respondents

	Frequency	Percent (%)
15 to 19 years	72	5.7
20 to 24 years	229	18.3
25 to 29 years	247	19.7
30 to 34 years	137	10.9
35 to 39 years	84	6.7
40 to 44 years	64	5.1
45 to 49 years	62	4.9
50 to 54 years	74	5.9
55 to 59 years	59	4.7
60 to 64 years	72	5.7
65 to 69 years	67	5.3
70 to 74 years	47	3.7
75 to 79 years	27	2.2
80 or more years	n.p.	n.p.
Total	1254	100.0

n.p. = Not Publishable

The majority of domestic overnight and day trip visitors were from New South Wales (23%), Victoria (23%) and Queensland (20%) (Table 3.2), and most of these respondents reported holiday as the main reason for their trip (64.9%), followed by visiting friends or relatives (11.1%) (Table 3.3). Domestic overnight visitors were away from home from one to 364 nights with a mean of 14 nights and a median of six nights.

Table 3.2. State of Residence - Domestic Overnight and Daytrip Visitors

	Indigenous Tourism Survey		National Visitor Survey*
	Frequency	Percent (%)	Percent (%)
New South Wales	110	22.7	32.3
Victoria	109	22.5	25.6
Queensland	97	20.0	22.8
South Australia	44	9.1	6.9
Western Australia	46	9.5	8.4
Northern Territory	51	10.5	0.9
Tasmania	20	4.1	2.8
Australian Capital Territory	n.p.	n.p.	1.5
Total Domestic visitors	485	100.0	100.0

*Includes domestic overnight and domestic day trip visitors n.p. = Not Publishable

Table 3.3. Purpose of Visit - Domestic Overnight and Daytrip Visitors

	Indigenous Tourism Survey		National Visitor Survey
	Frequency	Percent (%)	Percent (%)
Holiday	316	64.9	45.2
Visiting friends or relatives	54	11.1	31.0
Business	39	8.0	14.0
Other	78	16.0	10.6
Total	471	100.0	100.0

International respondents were in Australia from one to 364 nights with a mean of 82 nights and a median of 21 nights[3]. The international visitors were mainly visiting Australia for holiday reasons, followed by education, to visit friends and relatives, and business (Table 3.4). The majority of the international respondents were from China, England, Germany, Japan, New Zealand and the United States of America (USA) (Table 3.5).

Table 3.4. Purpose of Visit - International Visitors

	Indigenous Tourism Survey		International Visitor Survey
	Frequency	Percent (%)	Percent (%)
Holiday	551	65.3	44.0
Visiting friends and relatives	63	7.5	24.9
Business	55	6.5	16.2
Education	92	10.9	6.5
Employment	46	5.5	3.9
Other	37	4.4	4.5
Total	844	100.0	100.0

[3] The international visitor survey reports the average number of nights of all international visitors to Australia to be 35 nights with a median of 11 nights in the year ending June 2012. This is likely due to the higher prevalence of holiday visitors and education visitor in the sample with an under representation of VFR and business visitors. This is associated with the survey location of the present study.

Table 3.5. Country of Residence – International Visitors

	Indigenous Tourism Survey		International Visitor Survey
Country	**Frequency**	**Percent (%)**	**Percent (%)**
New Zealand	46	5.5	19.5
Japan	49	5.9	5.7
Singapore	25	3.0	5.1
Taiwan	28	3.4	1.5
Korea	42	5.1	3.3
China	115	13.8	10.0
Other Asia	114	13.7	15.8
USA & Canada	67	8.1	9.9
United Kingdom	94	11.3	10.2
Germany	74	8.9	2.7
Scandinavia	32	3.9	1.5
France	36	4.3	1.6
Italy	30	3.6	1.0
Other Europe	51	6.2	4.8
Other countries	29	3.5	7.4
Total	832	100.0	100.0

3.2 Product Awareness and Preferences

3.2.1 Awareness of Australian activities and experiences

The respondents were asked, without prompting from the interviewers, what activities and experiences they were aware of that could be undertaken in Australia. This question was aiming for spontaneous responses that would elicit respondents' 'top of mind' awareness of the types of activities, experiences or attractions available in Australia. Respondents were not aware at this stage of the questionnaire that the study was focused on Indigenous tourism.

'Outdoor/nature experiences' generally and 'local attractions/tourist experiences' (citing particular attractions and experiences in the local vicinity) were the top of mind responses for the majority of visitors. 'Arts/heritage experiences' were top of mind for 22% of all respondents, and 'Aboriginal cultural experiences' were for 19% of respondents. Domestic respondents were significantly more aware of the 'arts/heritage experiences' ($p < 0.001$) available than international visitors (Table 3.6).

Table 3.6. Awareness of Australian Activities and Experiences (unprompted)

	Domestic Respondents		International Respondents		Total Respondents	
	Frequency	%	Frequency	%	Frequency	%
Outdoor / nature experiences	356	74.2	608	73.0	964	73.4%
Local attractions / tourist experiences	259	54.0	436	52.3	695	52.9%
Active outdoor / sport experiences	215	44.8	291	34.9	506	38.5%
Social or other experiences	174	36.3	293	35.2	467	35.6%
Arts / heritage experiences	135	28.1	150	18.0	285	21.7%
Aboriginal cultural experiences	102	21.3	153	18.4	255	19.4%
Total respondents	480	100.0	833	100.0	1,313	100.0%

3.2.2 Preferences, intention and visit

Respondents were posed a hypothetical open-ended question that asked what would be the ‘top’ five things that they would like to see or do in Australia. To avoid constraining respondents’ ‘top of mind’ responses, the hypothetical scenario was based on the respondent having unlimited time and money to participate in these activities or experiences.

The ‘top’ attraction/experience on both the domestic and international visitors ‘wish list’ was general ‘sightseeing/travelling around’ with 37% of domestic and 50% of international respondents citing this as their most desired experience in Australia. Indigenous tourism was ranked 37^{th} for international visitors and 59^{th} for domestic visitors (Table 3.7).

Respondents were then asked to consider, from a predetermined list, activities and experiences that could be undertaken while visiting Australia. The list was a randomised and abridged version of the standardised visitor activities list that has been developed to code activity responses in TRA’s international and national visitor surveys. Here, respondents were asked to rate on a scale of 1 to 5 (where ‘1’ is not at all important and ‘5’ is extremely important), how important it was to undertake certain experiences while in Australia. The respondents were also asked to state whether they had, or planned to, undertake any of the experiences while on this trip. Table 3.8 shows that sightseeing was important (mean 4.2) and that the vast majority of both domestic (84%) and international (82%) respondents were undertaking this activity. Other activities such as national parks/state parks/etc., while rated relatively high by respondents in terms of importance as an activity, had fewer respondents intending to participate during this trip (Table 3.8).

Table 3.7. Top Experiences - Domestic and International Visitors (unprompted)

	Domestic Visitors		International Visitors	
Rank	**Desired experience**	**% Domestic visitors**	**Desired experience**	**% International visitors**
1	Sightseeing / travelling around	37%	Sightseeing / travelling around	50%
2	Great Barrier Reef	22%	Great Barrier Reef	24%
3	Uluru	17%	Adventure	21%
4	Tasmania	16%	Uluru	16%
5	Adventure	13%	Diving	13%
6	Cultural	11%	Sydney	13%
7	Kimberley	11%	Shopping	12%
8	Gourmet	9%	Islands	11%
9	Boating	9%	Wildlife	11%
10	Broome	8%	Gourmet	9%
11	Active Outdoor	7%	Boating	8%
12	Islands	7%	Tasmania	8%
13	Sydney	7%	Active outdoor	8%
14	Kakadu	7%	Outback	8%
15	Outback	7%	Harbour Bridge	7%
16	Sports	7%	Melbourne	7%
17	Nature based activities	7%	Migration	7%
18	Western Australia	6%	Opera house	7%
19	Shopping	6%	Cultural	7%
20	Business	5%	Business	6%
21	Train travel	5%	Education	6%
22	Beach	4%	Gold Coast	6%
23	Cairns	4%	Clubs/gaming	5%
24	Alpine areas	4%	Beach	4%
25	Diving	4%	Nature based activities	4%
26	Events	4%	Sport	4%
27	Gold Coast	4%	Social	4%
28	Darwin	4%	Cairns	4%
29	Great Ocean Road	4%	Perth	4%
30	National park	3%	Events	3%
31	Melbourne	3%	National park	3%
32	Perth	3%	Relaxation	3%
33	Caravanning	3%	Alice Springs	3%
34	Migration	3%	Luxury	3%
35	Queensland	3%	Kakadu	2%
36	Wildlife	3%	Western Australia	2%
37	Alice Spring	2%	Indigenous	2%
59	Indigenous	1%		

*Developed from open ended question asking respondents their top five Australian experiences n=1269

Again, respondents were not aware at this point that the survey was focused on Indigenous tourism although five of the experience options in the list related to Indigenous tourism. 'Going on a tour with an Aboriginal guide', 'visit and Aboriginal cultural centre/gallery', 'see an Aboriginal performance', and 'visit and Aboriginal site or community' ranked around the midpoint of the scale with means of 3.1 and 3.0 for all visitors. Somewhat further down the importance scale was to 'stay with an Aboriginal host'. For domestic visitors few had intentions to participate in Indigenous activities: 'going on a tour with an Aboriginal guide' 10%; 'visit and Aboriginal cultural centre/gallery' 14%; 'see an Aboriginal performance' 10%; 'visit and Aboriginal site or community' 10%; and, 'stay with an Aboriginal host' 3%. For international visitors 'visit an Aboriginal cultural centre/gallery' and 'see an Aboriginal performance' were more popular at 20% and 18% respectively (Table 3.8).

For each of the Indigenous related activities domestic respondents were significantly less likely than international respondents to consider it important to:

- go on a tour with an Aboriginal Guide (p=0.013).
- stay with an Aboriginal host (in Aboriginal owned/run accommodation) (p=0.001).
- visit an Aboriginal cultural centre/gallery (p<0.001).
- see an Aboriginal performance (p<0.001).
- visit an Aboriginal site or community (p=0.001)

In contrast, there were no significant differences found between domestic and international respondents in terms of how important it was to them to visit national parks/state parks/world heritage sites/botanical gardens; events, festivals, fairs and markets; shopping; museums, art galleries, history/heritage buildings, sites or monuments; and, visit the Outback (Table 3.8).

Table 3.8. Perceived Importance (preference) and Intentions to Participate in Activities and Experiences (prompted)

Experience	Domestic and International respondents				Domestic respondents		International respondents	
	Frequency	Mean	Std. Dev.	Total undertaking activity	Mean	% domestic respondents undertaking activity	Mean	% international respondents undertaking activity
Sightseeing / looking around	1253	4.2	0.9	1039	4.2	84%	4.3	82%
National parks / state parks / world heritage sites / botanical gardens	1255	4.1	1.0	654	4.0	41%	4.1	59%
Wildlife parks / zoos / aquariums	1249	3.7	1.1	536	3.6	29%	3.8	51%
Visit the outback	1240	3.7	1.2	303	3.7	20%	3.7	27%
Museums, art galleries, history / heritage buildings, sites or monuments	1254	3.5	1.1	585	3.5	39%	3.5	51%
Events, festivals, fairs and markets	1253	3.5	1.1	525	3.4	36%	3.5	46%
Sports / Adventure activities	1233	3.3	1.3	359	3.1	21%	3.4	34%
Go on a tour with an Aboriginal Guide	1246	3.1	1.3	139	3.0	10%	3.2	12%
Visit an Aboriginal cultural centre/gallery	1246	3.1	1.2	224	2.9	14%	3.2	20%
See an Aboriginal performance	1233	3.0	1.2	185	2.9	10%	3.2	18%
Visit an Aboriginal site or community	1237	3.0	1.2	133	2.9	10%	3.1	11%
Shopping	1245	2.9	1.3	747	2.9	61%	3.0	60%
Pubs, clubs, discos, casinos and restaurants	1242	2.9	1.4	623	2.7	47%	3.0	52%
Attend theatre, concerts or performing arts	1258	2.9	1.2	281	3.0	20%	2.9	24%
Stay with an Aboriginal host (in Aboriginal owned / run accommodation)	1236	2.5	1.2	47	2.4	3%	2.6	4%
Amusement / theme parks	1257	2.3	1.3	265	2.2	16%	2.4	24%
Health spa or wellbeing centre	1236	2.1	1.2	83	2.2	9%	2.1	5%

Principal axis factoring (exploratory factor analysis) with varimax rotation was performed to assess the underlying structure of the 17 variables relating to preference to undertake selected experiences in Australia. The specific procedure followed was:

- Factors with eigenvalues of at least one were requested. This produced five factors, all of which appeared to be 'theoretically meaningful'. As expected, all of the Indigenous tourism related experiences loaded into factor 1 indicating that the respondents thought about these items in a similar way (Table 3.9).
- Table 3.9 shows the items and factor loadings, with loadings less than 0.4 omitted to improve clarity. Note that 'visit the outback' originally crossloaded onto factors 1 and 2, but after omitting factors with loadings less that 0.4 it did not load onto any of the factors and does not appear in the table. Using alternative factoring methods, or replacing missing values for any item with the mean value for that item (N=1292), produced very similar results, which suggests that this factoring is quite robust. Therefore, a factor score was created for each of the five factors by calculating the mean value of all items which loaded onto that factor.
- Five separate linear regressions were then performed, with each of the five factor scores as the dependent variable, and the demographic variables age, gender and sex as the covariates. Age given as score from 1-14 (1=15-19 years,....,14=80 or over) was included as a linear variable (Table 3.10)

Table 3.9. Factor Analysis Results of Prompted Activities and Experiences that can be Undertaken in Australia

Item	Factor					Communality
	1	2	3	4	5	
Visit Aboriginal culture centre/gallery	0.855					0.74
Visit an Aboriginal site or community	0.827					0.76
See an Aboriginal performance	0.730					0.60
Go on a tour with an Aboriginal guide	0.725					0.57
Stay with an Aboriginal host (in Aboriginal owned/run accommodation)	0.705					0.53
National parks/state parks/world heritage sites/botanic gardens		0.689				0.59
Museums, art galleries, history/heritage buildings, sites or monuments		0.460				0.42
Sightseeing/ looking around		0.446				0.22
Wildlife parks/zoos/aquariums		0.442				0.30
Shopping			0.722			0.54
Health spa or wellbeing centre			0.445			0.28
Amusement/theme parks			0.442			0.29
Attending theatre, concerts or performing arts				0.794		0.68
Events, festivals, fairs and markets				0.440		0.36
Sports/adventure activities					0.657	0.46
Pubs, clubs, discos, casinos and restaurants					0.444	0.23
Eigen values(initial)	4.6	2.1	1.4	1.3	1.0	
% of variance(rotated)	19.7	8.4	6.9	6.6	5.0	

*Complete case analysis of n=1151

Table 3.10. Regression of the demographic variables by the five experience factors (prompted)

	Factor 1		Factor 2		Factor 3		Factor 4		Factor 5	
	Effect	p-value	Effect	p-value	Effect	p-value	Effect	p-value	Effect	p-value
Age per 5 years	-0.004	0.695	-0.003	0.648	-0.065	<0.001	-0.027	0.003	-0.152	<0.001
Gender Male v female	-0.059	0.312	-0.053	0.191	-0.212	<0.001	-0.244	<0.001	0.356	<0.001
Origin International v domestic	0.183	0.008	0.061	0.195	-0.174	0.004	-0.166	0.011	-0.189	0.004

The key findings of the factor analysis regarding preferences to undertake selected Australian experiences include:

- There was no evidence that preference for Indigenous tourism (factor 1) was related to age or gender, but it appeared that international visitors on average, scored 0.183 points more highly on this factor than domestic visitors (p=0.008). This means that international visitors are more likely to have a preference to undertake Indigenous experiences then domestic visitors.
- There was no evidence that sightseeing/looking around (factor 2) was related to age, gender or visitor type (domestic/international).
- However, shopping/spa/theme parks (factor 3) appeared to be related to age, gender and origin. On average, older people scored less on this factor than younger people (0.065 points per 5 years of age; p<0.001). Males scored on average, 0.212 points less than females on this factor (p<0.001). International travellers scored on average, 0.174 points less than domestic travellers on this factor (p=0.004).
- Culture/events (factor 4) appeared to be related to age, gender and origin. On average, older people scored less on this factor than younger people (0.027 points per 5 years of age; p=0.003). Males scored on average, 0.244 points less than females on this factor (p<0.001). International travellers scored on average, 0.166 points less than domestic travellers on this factor (p=0.011).
- Sport/social (factor 5) appeared to be related to age, gender and origin. On average, older people scored less on this factor than younger people (0.152 points per 5 years of age; p<0.001). Males scored on average, 0.356 points more than females on this factor (p<0.001). International travellers scored on average, 0.189 points less than domestic travellers on this factor (p=0.004).

3.2.3 Respondents not participating in an Indigenous experience

Those who indicated that they were not going to undertake one of the five Indigenous experiences in the preferences and intentions questions (domestic n = 358; international n = 540) (Table 3.11) were directed to a series of additional questions.

Table 3.11. Intention to Participate in an Indigenous Experience

Undertaking an Indigenous activity?	Domestic		International		Total	
	Frequency	Percent (%)	Frequency	Percent (%)	Frequency	Percent (%)
Yes*	116	24.5	275	33.7	391	30.3
No	358	75.5	540	66.3	898	69.7
Total	474	100.0	815	100.0	1,289	100.0

*Based on whether respondents selected one of the five Indigenous activities in the intention to undertake activities question

Of those respondents who indicated that they were not undertaking an Australian Indigenous experience on this trip, 35% stated that they had previously participated in an Australian Indigenous experience (Table 3.12). Domestic respondents were significantly ($p<0.001$) more likely to have previously undertaken an Indigenous experience in Australia (61.7% of domestic respondents compared with 17.2% of international respondents).

Table 3.12. Previously Participated in an Indigenous Experience

	Frequency	Percent (%)	Domestic %	International %
Participated	314	35.0	61.7	17.2
Not participated	570	63.5	37.2	80.9
Don't Know	n.p.	n.p.	n.p.	n.p.
Total	898	100.0	100.0	100.0

*Percentages may not sum due to rounding n.p. = Not Publishable

This sample of respondents was then asked if they were likely to undertake an Australian Indigenous experience some time in the future. Generally respondents stated that they would one day, but not in the next five years (43.6%) or they never would undertake an Indigenous experience in Australia (19.9%). There was no significant difference between domestic and international visitors in response to this question (Table 3.13).

Table 3.13. Timeframe to undertake an Indigenous experience

	Frequency	Percent (%)
In the next month	51	5.7
In the next year	132	14.8
In two to five years	142	16.0
One day, but not in the next 5 years	388	43.6
Never	177	19.9
Total	890	100.0

These same respondents who had indicated that they were not participating in an Indigenous experience on this trip were also asked to rate, on a scale of 1 to 5 (with ‘1’ being not at all and ‘5’ being to a very great extent) to what extent a series of potential barriers were preventing them from undertaking an Indigenous experience in Australia. Results show that across all respondents in this sample, the main barriers were limited time available ($\bar{x}$ = 3.5), other activities and sightseeing ($\bar{x}$ = 3.2) and the activity is too expensive or they have a limited budget ($\bar{x}$ = 3.1) (Table 3.14).

Table 3.14. Barriers to Participating in Indigenous Tourism

Barriers	Frequency	Mean	Std. Dev.
Limited time available	744	3.5	1.5
Other activities / sightseeing	695	3.2	1.4
Activity is too expensive / limited budget	710	3.1	1.5
Other activities provide better value for money	654	3.0	1.3
Access / transport availability	687	3.0	1.5
Too far to travel	699	3.0	1.4
Not a high priority (not recommended by others, not prestigious)	703	3.0	1.4
Lack of interest	733	2.7	1.5
Don't know where to go / what is available / how to book	706	2.7	1.5
Prefer more adventurous or active activities (not fun / exciting enough)	696	2.7	1.5
Not available in destinations you are visiting	663	2.6	1.4
Outside my comfort zone (Cultural or language barriers)	699	2.1	1.3
Worried about safety or food	693	2.0	1.3

*5 point scale from 1 “Not at all” to 5 “To a very great extent”

Responses from an open-ended option for respondents to provide ‘other’ barriers included: they thought the experience was not authentic (n=62) and they had previously participated in an Indigenous activity and did not see a need to do so again (n=12). It is not possible to provide means of these ‘other’ barrier responses as respondents were only asked to list these and not to rate them on a scale.

Both international and domestic visitors stated that limited time available was the main barrier to undertaking an Indigenous activity in Australia. International visitors reported nearly all the barriers to be a significantly greater factor for not participating in an Indigenous experience than domestic respondents. The exceptions were ‘lack of interest’ and ‘not a high priority’ where there was no significant difference between domestic and international respondents, although these were significant at the 10% level (Table 3.15).

Table 3.15. Barriers to Participating in Indigenous Tourism – Domestic and International

Barriers	Domestic			International			t-test for differences between domestic & international respondents Pr(|T| > |t|)
	Freq	Mean	Std. Dev.	Freq	Mean	Std. Dev.	
Limited time available	300	3.2	1.5	444	3.7	1.4	<0.001**
Other activities / sightseeing	292	3.1	1.4	403	3.3	1.4	0.034**
Not a high priority (not recommended by others, not prestigious)	293	2.9	1.4	410	3.1	1.3	0.086*
Too far to travel	299	2.8	1.5	400	3.2	1.4	<0.001**
Other activities provide better value for money	277	2.7	1.3	377	3.2	1.3	<0.001**
Access / transport availability	296	2.7	1.5	391	3.2	1.4	<0.001**
Activity is too expensive / limited budget	297	2.6	1.5	413	3.3	1.4	<0.001**
Lack of interest	314	2.6	1.6	419	2.8	1.5	0.073*
Not available in destinations you are visiting	281	2.5	1.4	382	2.7	1.4	0.022**
Prefer more adventurous or active activities (not fun / exciting enough)	292	2.4	1.4	404	3.0	1.4	<0.001**
Don't know where to go / what is available / how to book	294	2.2	1.4	412	3.1	1.5	<0.001**
Outside my comfort zone (cultural or language barriers)	297	1.7	1.1	402	2.4	1.4	<0.001**
Worried about safety or food	291	1.6	1.1	402	2.2	1.4	<0.001**

** Significant at the 5% level, * Significant at the 10% level

Principal axis factoring (factor analysis) with varimax rotation was performed to assess the underlying structure of the 14 variables concerning barriers to participating in Indigenous experiences. Specific details of the analysis include:

- The assumptions of normality, linear relationships between pairs of variables and moderate correlation between variables were all checked and no problems were observed, implying that analysis could commence without transformation of the variables.
- Factors with eigenvalues of at least one were requested and this produced three factors, all of which appeared to be 'theoretically meaningful', suggesting that they logically group together.
- Table 3.16 shows the items with factor loadings less than 0.4 were omitted to improve clarity and to reveal items loading into particular factors. Factor 1 appeared to be related to a general 'lack of interest'; factor 2 'practical considerations' and factor 3 'concern/anxiety'.
- Note that three items were removed sequentially as they did not load onto any of the factors – these were 'limited time available', 'not authentic' and 'not available in the destinations you were visiting'. The item 'other activities provide better value for money' crossloads onto factors 1 and 2.

- It was found that using alternative factoring methods, or replacing missing values for any item with the mean value for that item (n=836), produced a very similar three factor solution which implies that the initial factoring is quite robust.
- A factor score was created for each of the three factors by calculating the mean value of all items which loaded onto that factor.
- Three separate linear regressions were performed, with each of the five factor scores as the dependent variable, and the demographic variables age, gender and origin as the covariates. The age variable was included as a linear variable (Table 3.17).

Table 3.16. Factor Analysis Results of Barriers to Participating in an Indigenous Experience

Item	Factor			Communality
	1	2	3	
Prefer more adventurous activities (not fun/exciting enough)	0.696			0.40
Lack of interest	0.581			0.29
Not a high priority (not recommended by others, not prestigious)	0.567			0.31
Other activities/ sightseeing	0.503			0.32
Other activities provide better value for money	0.472	0.434		0.43
Access/transport availability		0.792		0.48
Too far to travel		0.678		0.45
Activity is too expensive/limited budget		0.485		0.31
Outside my comfort zone (cultural or language barriers)			0.721	0.43
Worried about safety or food			0.614	0.31
Don't know where to go/what is available/how to book			0.448	0.23
Eigenvalues(initial)	3.91	1.41	1.17	
% of variance(rotated)	16.7	16.0	12.0	

*Complete case analysis of N=518

Table 3.17. Regression of the Demographic Variables by the Three Barrier Factors

	Factor 1 (Lack of Interest)		Factor 2 (Practical Considerations)		Factor 3 (Concern/Anxiety)	
	Effect	p-value	Effect	p-value	Effect	p-value
Age per 5 years	-0.062	<0.001	-0.047	<0.001	-0.049	<0.001
Gender Male v female	0.197	0.009	-0.121	0.123	-0.135	0.092
Origin International v domestic	0.096	0.268	0.348	<0.001	0.619	<0.001

The key findings of the factor analysis of barriers to participating in an Indigenous experience include:

- Both age and gender appear to be related to lack of interest (factor 1). 'Older' tourists[4] on average score lower than younger tourists (0.062 points per 5 years of age; $p<0.001$), thus younger people are more likely to state 'disinterest/alternative preferences' as barriers against participating in Indigenous experiences. Males visitors on average, scored 0.197 points more highly than females on this factor ($p=0.009$).
- Age and origin appear to be related to practical considerations (factor 2). Again older tourists on average, scored lower than younger tourists (0.047 points lower per 5 years of age; $p<0.001$), and international tourists scored 0.348 points higher on average, than domestic tourists ($p<0.001$). It seems that younger tourists and international tourists are most likely to give 'practical reasons' as barriers.
- Age and origin also appeared to be related to concern/anxiety (factor 3). Again older tourists on average, scored lower than younger tourists (0.049 points lower per 5 years of age; $p<0.001$), and international tourists scored 0.619 points higher on average, than domestic tourists ($p<0.001$). Younger tourists (perhaps less travel experienced) and international tourists are most likely to cite concern/anxiety as barriers to participating in Indigenous experiences.

3.3 Indigenous Tourism Activity and Experience Scenarios

Respondents were provided with eight different Indigenous tourism activity and experience scenarios containing a series of questions to elicit the appeal, intentions, willingness to pay, and any barriers to participating. The scenarios were hypothetical and designed to represent a range of options from tours, accommodation or static displays, to varying lengths of time to participate, to activities and experiences in urban and remote locations. It was not possible to include every type or combination of experiences available. Data collectors introduced each scenario by asking "the first/next/last experience I would like you to consider is…" The eight scenarios are included below. Due to the time constraints of the survey, the interviewers utilised abridged versions of the full scenario for subsequent questions and these are included in brackets below.

- Scenario 1: Going on a two hour walking tour with an Aboriginal Guide. This will involve learning about bush tucker, history, heritage and culture, and is within driving distance of a major capital city (Two hour walking tour with an Aboriginal Guide).

[4] As noted previously the age variable was included as a linear variable.

- Scenario 2: Staying overnight in a remote Aboriginal Community or on Aboriginal Land. This may be in budget or midrange accommodation with shared facilities. For example, staying in a Safari Tent with a shared bathroom (Stay overnight in a remote Aboriginal community/on Aboriginal land).
- Scenario 3: Attending an Aboriginal cultural show or performance as one part of a larger tourist attraction. For example, Dreamworld or Currumbin Wildlife Sanctuary (Experience an Aboriginal cultural show or performance).
- Scenario 4: Staying overnight in a luxury cabin on Aboriginal land. This luxury cabin is located on a remote beach with private facilities (Stay overnight in a luxury cabin on Aboriginal land).
- Scenario 5: Viewing a museum display of Aboriginal history, photos, art, artefacts and crafts, which is one part of a larger museum (Experience an Aboriginal museum display).
- Scenario 6: Going on a full day tour in a vehicle with an Aboriginal Guide. This may involve seeing an iconic landscape and attraction, such as the Daintree Rainforest, Kakadu, Great Ocean Road and the Australian Alps. Whilst on the tour you will learn about Aboriginal history, heritage and culture (Full day tour with an Aboriginal guide).
- Scenario 7: Joining an Aboriginal guide for a half day adventure activity. For example, Four Wheel Driving, Mud Crabbing, Fishing or Kayaking (Half day adventure activity with an Aboriginal guide).
- Scenario 8: Visiting a remote outback location to see Aboriginal rock paintings or carvings (Visit remote Aboriginal rock paintings or carvings).

At the beginning of each scenario, respondents were asked to rate the appeal of the experience or activity on a scale of 1 to 5 (with 1 not at all appealing and 5 very appealing). All of the experiences scored between 2.6 and 3.4 on a 5 point scale indicating that the activities are considered somewhat appealing/neutral by the survey respondents (Table 3.18).

Table 3.18. Appeal of Indigenous Tourism Experience and Activity Scenarios

Experience	Frequency	Mean	Std. Dev.
Two hour walking tour with an Aboriginal Guide	1212	3.3	1.3
Stay overnight in a remote Aboriginal Community/on Aboriginal land	1169	2.6	1.4
Experience an Aboriginal cultural show or performance	1153	3.1	1.3
Stay overnight in a luxury cabin on Aboriginal land	1125	2.7	1.4
Experience an Aboriginal museum display	1125	3.2	1.3
Full day tour with an Aboriginal guide	1139	3.4	1.4
Half day adventure activity with an Aboriginal guide	1079	3.2	1.4
Visit remote Aboriginal rock paintings or carvings	1110	3.2	1.4

International visitors were significantly more likely to find the following activities more appealing than domestic visitors:

- Two hour walking tour with an Aboriginal guide
- Stay overnight in a remote Aboriginal community/on Aboriginal land
- Experience an Aboriginal cultural show or performance
- Full day tour with an Aboriginal guide
- Visit remote Aboriginal rock paintings or carvings

There was no significant difference in the remaining scenarios (Table 3.19).

Table 3.19. Appeal of Indigenous Experience Scenarios by International and Domestic Tourists - Group Statistics

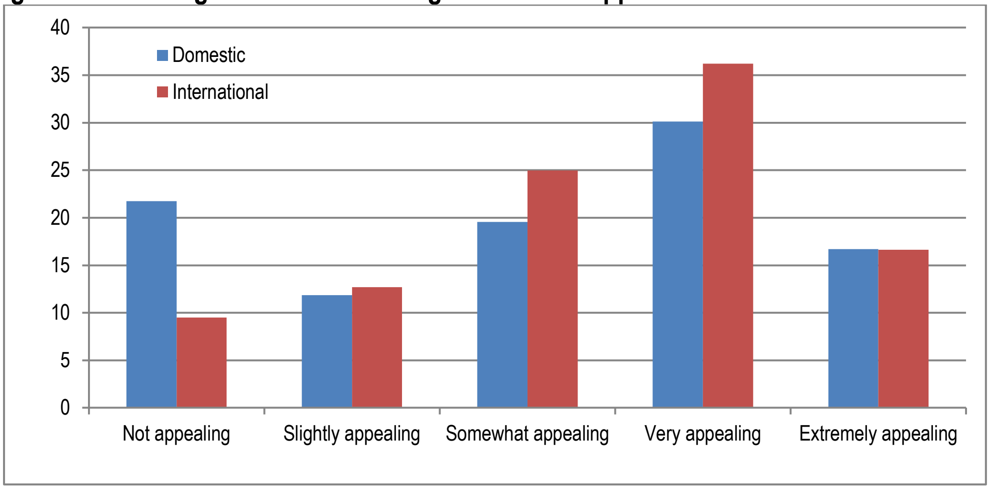
	Domestic/International	Frequency	Mean	Std. Deviation	*p*-value
Two hour walking tour with an Aboriginal Guide	International	757	3.38	1.181	t = 3.784 df = 834.36 p-value < 0.001*
	Domestic	455	3.08	1.399	
Stay overnight in a remote Aboriginal Community/on Aboriginal land	International	723	2.74	1.349	t = 3.436 df = 917.119 p-value = 0.001*
	Domestic	446	2.46	1.397	
Experience an Aboriginal cultural show or performance	International	711	3.21	1.231	t = 2.86 df =900.25 p-value = 0.004*
	Domestic	442	2.99	1.294	
Stay overnight in a luxury cabin on Aboriginal land	International	697	2.69	1.427	t = -1.333 df = 884.361 p-value = 0.183
	Domestic	428	2.81	1.467	
Experience an Aboriginal museum display	International	693	3.23	1.243	t = 0.262 df = 885.367 p-value = 0.793
	Domestic	432	3.21	1.297	
Full day tour with an Aboriginal guide	International	705	3.48	1.290	t = 1.885 df = 841.004 p-value = 0.06
	Domestic	434	3.32	1.439	
Half day adventure activity with an Aboriginal guide	International	662	3.27	1.327	t = 3.305 df = 809.343 p-value = 0.001*
	Domestic	417	2.98	1.488	
Visit remote Aboriginal rock paintings or carvings	International	681	3.28	1.323	t = 1.075 df = 871.548 p-value = 0.283
	Domestic	429	3.19	1.400	

For the full analysis tables that correlate to each of the eight scenarios see Appendix 10.

3.3.1 Scenario 1: Walking Tour with an Aboriginal Guide

The appeal of a 'two hour walking tour with an Aboriginal guide to learn about bush tucker, history, heritage and culture, and is within driving distance of a major capital city' was considered by 51% of respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale). International visitors ($\bar{x}$ = 3.4) were significantly (p<0.001) more likely to find the experience appealing than domestic visitors ($\bar{x}$ = 3.1) (Figure 3.1).

Figure 3.1. Walking Tour with an Aboriginal Guide – Appeal – Domestic and International



Mean 3.3, Median 4.0

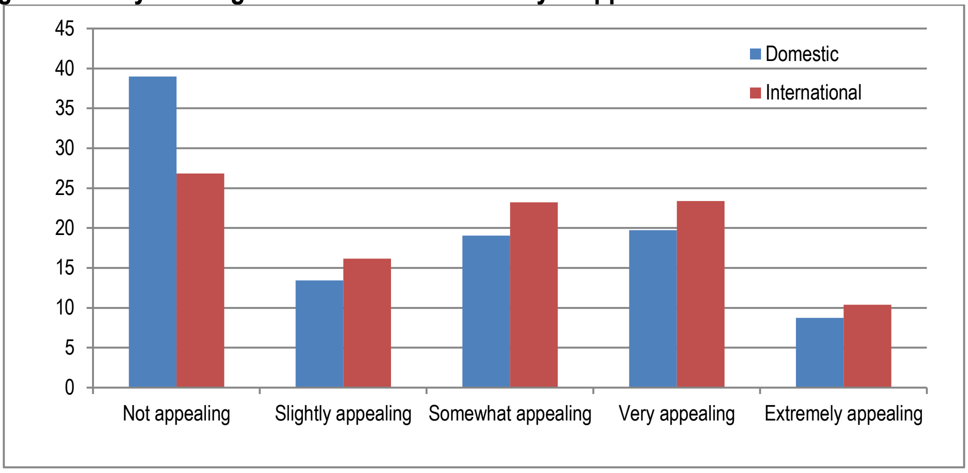
Key findings relating to Scenario 1 included:

- In terms of intentions to participate, approximately half of all respondents who found the experience appealing still did not intend to undertake the activity (36%) or did not know (13%) if they would undertake the activity. For both domestic and international visitors, the reasons for this were the limited time available (46%) or they did not know where to go for the experience/what is available/ how to book (30%).
- International visitors were significantly more willing than domestic visitors to pay a higher amount of money to undertake a walking tour with an Aboriginal guide (p<0.001).
- Respondents who had, or intended to undertake, this activity indicated that they did so because of an interest in Aboriginal history, culture and/or traditions or because it was part of a tour itinerary (71%).
- Both domestic and international respondents who stated that they did not find a walking tour with an Aboriginal guide appealing generally indicated this was due to a lack of interest (36%).

3.3.2 Scenario 2: Stay Overnight in a Remote Aboriginal Community/on Aboriginal Land

The appeal of 'staying overnight in a remote Aboriginal Community or on Aboriginal Land in budget or mid-range accommodation with shared facilities, such as a safari tent with a shared bathroom' received a mean rating of 2.6 with only 32% of respondents ranking the experience as very appealing to extremely appealing (4 to 5 on a 5 point scale). International visitors ($\bar{x}$ = 2.7) were significantly ($p < 0.001$) more likely to find the experience appealing than domestic visitors ($\bar{x}$ = 2.5) (Figure 3.2).

Figure 3.2 Stay Overnight in a Remote Community – Appeal – Domestic and International



Mean 2.6, Median 3.0

Key findings relating to Scenario 2 included:

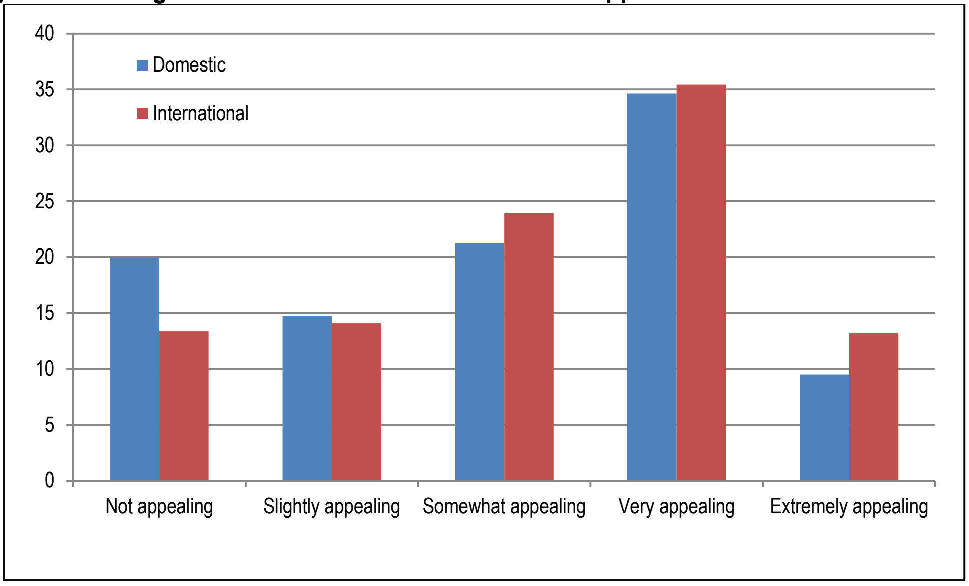
- Most respondents did not have intentions (63%) or did not know if they would undertake this activity (17%). Reasons included, for both domestic and international visitors, limited time available (50%), don't know where to go/what is available/how to book (36%) and that the activity is too expensive (17%).
- Those who had not undertaken the experience stated that on average (median), they would pay around \$51-\$100[5].
- Both domestic and international respondents who stated that they did not find an overnight stay in a remote community appealing claimed a lack of interest (35%).

3.3.3 Scenario 3: Aboriginal Cultural Show or Performance

The appeal of attending an 'Aboriginal cultural show or performance that is one part of a larger tourist attraction or site' was rated very appealing to extremely appealing by 47% of respondents (4 to 5 on a 5 point scale). International visitors ($\bar{x}$ = 3.2) were again found to be significantly ($p=0.004$) more likely to find the experience appealing than domestic visitors ($\bar{x}$ = 3.0) (Figure 3.3).

- [5] The sample is too low to report on those who had previously undertaken the experience. Further tests for willingness to pay and motivations for those respondents who had, or intended to, stay overnight in a remote Aboriginal community could not be performed due to small sample sizes.

Figure 3.3 Aboriginal Cultural Show or Performance – Appeal – Domestic and International



Mean 3.1, Median 3.0

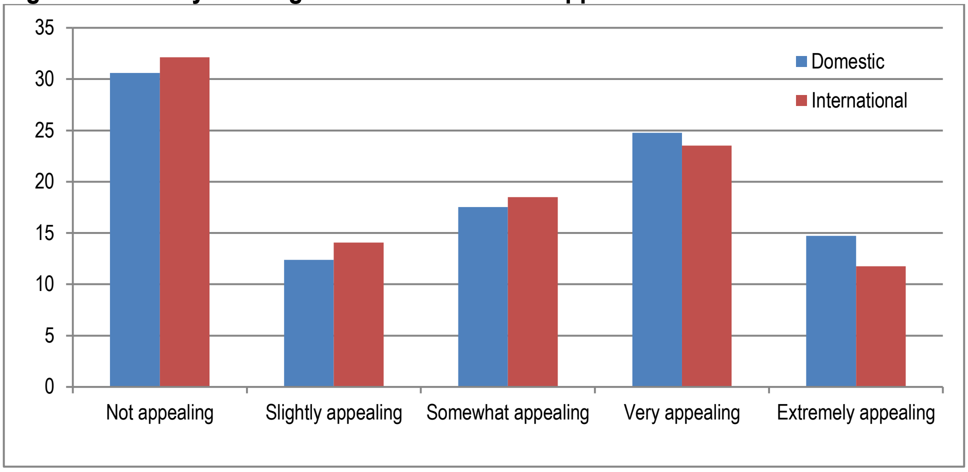
Key findings relating to Scenario 3 included:

- More than half of the respondents that rated attending an Aboriginal cultural show or performance as appealing also had undertaken (25%) or planned to (39%) undertake the experience.
- Respondents that had previously participated in this activity indicated that the experience was free or less than $50. Respondents who had not yet participated expected to pay up to $50. There was no difference between domestic and international visitors in terms of how much they were willing to pay for an Aboriginal cultural show.
- Most respondents who had, or intended to attend an Aboriginal cultural show or performance claimed that they did so because of an interest in Aboriginal history, culture and/or traditions (65%).
- Regardless of reported interest in the activity, both domestic and international respondents cited their limited time (47%) as the main barrier to participating in an Aboriginal cultural show.

3.3.4 Scenario 4: Luxury Overnight Stay on Aboriginal land

A further accommodation based scenario was posed to respondents where they were asked to consider 'staying overnight in a luxury cabin on Aboriginal land, where the luxury cabin is located on a remote beach with private facilities'. There was no significant difference in how appealing this experience was between international ($\bar{x}$ = 2.7) and domestic visitors ($\bar{x}$ = 2.8) with both rating it as only slightly to somewhat appealing (Figure 3.4).

Figure 3.4 Luxury Overnight Accommodation – Appeal – Domestic and International



Mean 2.7, Median 3.0

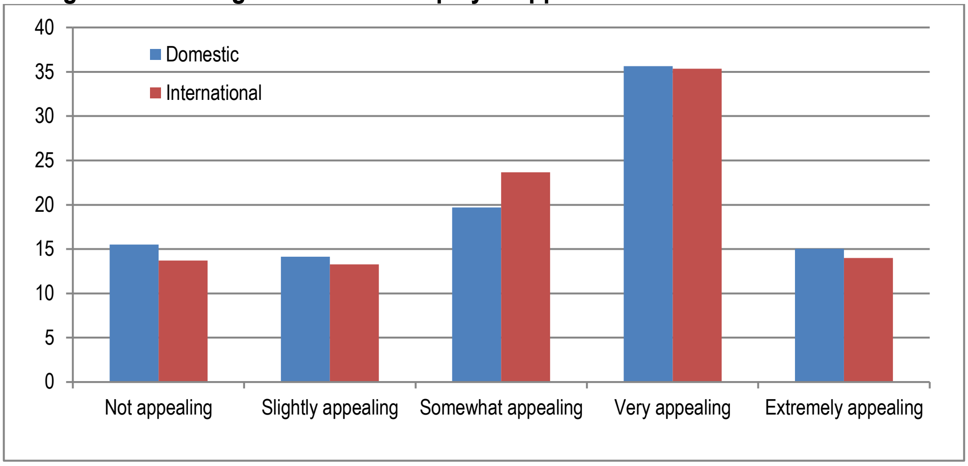
Key findings relating to Scenario 4 included:

- In terms of intentions to participate in such an experience, even those respondents that said it would be appealing did not intend to participate. This was generally because they considered the activity to be too expensive or they had a limited budget (38%), they had limited time available (34%), or they did not know where to go/what is available/how to book (31%).
- Respondents' willingness to pay showed that respondents would be willing to pay on average (median), $101-$200 for the experience.
- Domestic visitors were significantly more willing than international visitors to pay a higher price for this experience (p= 0.009).
- Respondents who had, or intended to, stay overnight in luxury accommodation on Aboriginal land indicated that they were motivated to do so because of an interest in Aboriginal history, culture and traditions or because it was part of a tour itinerary.
- A lack of interest (30%) and the activity is too expensive/limited budget (30%) were cited by respondents as the main reasons why an overnight luxury stay in accommodation on Aboriginal land had low appeal.

3.3.5 Scenario 5: Aboriginal Museum Display

Approximately half of all respondents rated viewing a 'museum display of Aboriginal history, photos, art, artefacts and crafts, which is one part of a larger museum' as very appealing or extremely appealing (4 to 5 on a 5 point scale). There was no significant difference in how appealing this experience scenario was between international ($\bar{x}$ = 3.2) and domestic visitors ($\bar{x}$ = 3.2) (Figure 3.5).

Figure 3.5. Aboriginal Museum Display – Appeal – Domestic and International



Mean 3.2, Median 3

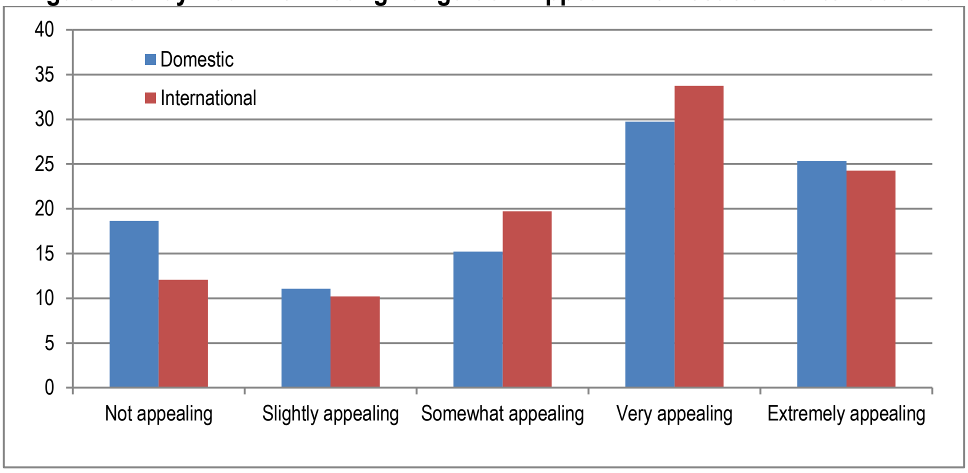
Key findings relating to Scenario 5 included:

- Approximately 50% of all respondents found the scenario appealing and some 77% of these had, or intend to, participate in this experience. The predominant reason for this was reported as an interest in Aboriginal history, culture and/or traditions (68%).
- Respondents either had not or would not pay for such an experience (36%) or they would pay between $1 and $50 (48%). There was no significant difference between domestic and international respondents in terms of willingness to pay.
- A lack of available time (47%) and not knowing where to go/what is available/how to book (29%) were considered barriers to participation by those that expressed an interest in the experience but would not be participating.
- Both domestic and international respondents who stated that they did not find an Aboriginal museum display interesting attributed this to a lack of interest (43%).

3.3.6 Scenario 6: Day Tour with Aboriginal guide

Over half of the respondents (57%) considered going on a 'full day tour in a vehicle with an Aboriginal guide' to be very appealing to extremely appealing (4 to 5 on a 5 point scale). The scenario used the example of a tour that included 'visiting iconic landscapes and/or attraction, such as the Daintree Rainforest, Kakadu, Great Ocean Road or the Australian Alps'. There was no significant difference in appeal of this experience between international ($\bar{x}$ = 3.5) and domestic visitors ($\bar{x}$ = 3.3) (Figure 3.6).

Figure 3.6 Day Tour with Aboriginal guide – Appeal – Domestic and International



Mean 3.4, Median 4

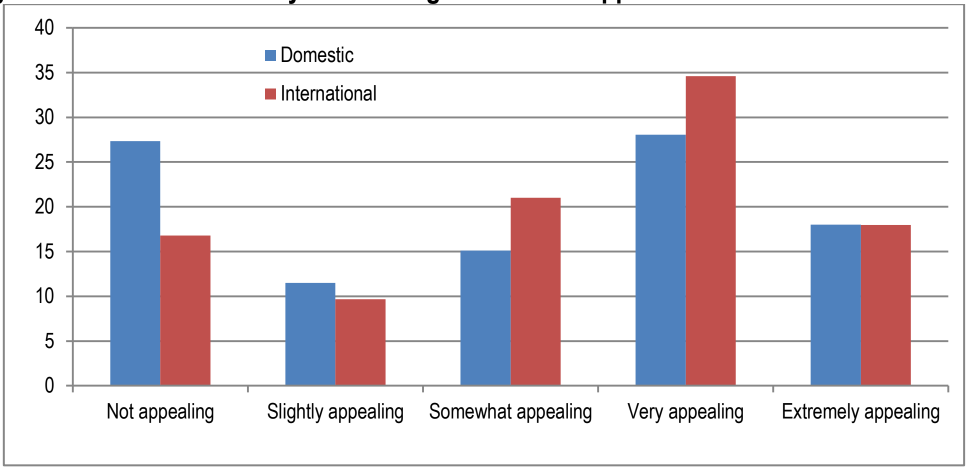
Key findings relating to Scenario 6 included:

- Most respondents did not have intentions to undertake this activity (43%) or did not know if they would undertake the activity (17%). This was due to limited time available (41%) or not knowing where to go, what is available or how to book (31%).
- Respondents would be willing to pay an average (median) of $101-$200 to undertake a full day tour with an Aboriginal guide.
- Motivations to participate in this experience included an interest in Aboriginal history, culture and/or traditions (56%).
- A lack of interest was the main reason for the low appeal of this experience to the survey respondents (26%).

3.3.7 Scenario 7: Adventure Activity with an Aboriginal Guide

Respondents were asked to consider joining an 'Aboriginal guide for a half day adventure activity; for example to participate in four-wheel driving, fishing, kayaking or other similar activities'. For this experience, 50% of respondents stated that they considered this to be very to extremely appealing (4 to 5 on a 5 point scale) (Figure 3.7).

Figure 3.7 Adventure Activity with Aboriginal Guide – Appeal – Domestic and International



Mean 3.2, Median 4.0

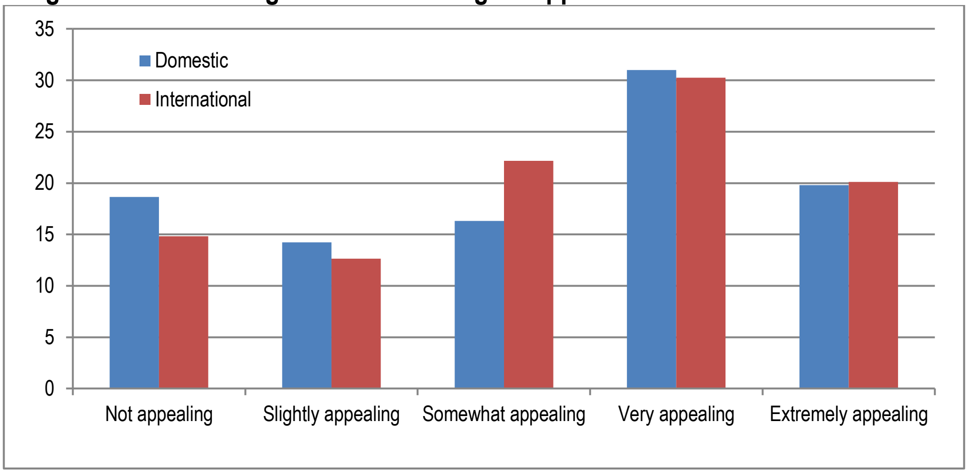
Key findings relating to Scenario 7 included:

- Willingness to pay was explored and while the sample is too low to report on those who had previously undertaken the experience, those who had not undertaken the experience stated that on average (median), they would pay around $51-$100 for the experience.
- There was no difference between international and domestic visitors in terms of how much they were willing to pay to undertake an adventure activity with an Aboriginal guide.
- Motivations to participate in such an activity included an interest in Aboriginal history, culture and/or traditions (62%).
- For those respondents who indicated that they found undertaking an adventure activity with an Aboriginal guide to be an appealing experience, but had not or would not be undertaking the experience attributed this to limited time available (43%) and they don't know where to go, what is available or how to book (37%).
- A lack of interest in the experience (42%) was the most frequently cited reason for low appeal amongst domestic and international visitors.

3.3.8 Scenario 8: Visit Aboriginal Rock Paintings or Carvings

The final scenario posed to respondents asked them to consider the appeal of visiting a 'remote outback location to see Aboriginal rock paintings or carvings'. For this scenario 51% stated that they found the experience very appealing to extremely appealing (4 to 5 on a 5 point scale). There was no significant difference in how appealing this experience was for international ($\bar{x}$ = 3.3) and domestic visitors ($\bar{x}$ = 3.2) (Figure 3.8).

Figure 3.8 Visit Aboriginal Rock Paintings – Appeal – Domestic and International



Mean 3.2, Median 4.0

Key findings relating to Scenario 8 included:

- Respondents who had previously undertaken this experience indicated that they had done so for free. Respondents who had not yet participated expected to pay between $1 and $100.
- There was a significant difference between domestic and international visitors in terms of how much they were willing to pay to visit Aboriginal rock paintings (p=0.002), with domestic visitors wanting the experience to be free on average (median), while international visitors were willing to pay on average (median) between $1-50 for the experience.
- Most respondents who had, or intended to visit Aboriginal rock paintings claimed that they did so because of an interest in Aboriginal history, culture and/or traditions (73%) or because it was part of a tour itinerary (26%).
- The barriers to participation, by those who reported an interest in this scenario, included limited time available (48%), not knowing where to go, what is available or how to book (23%) and that it was too far to travel (22%). When split by domestic and international visitors, limited time available remained the main barrier for not visiting Aboriginal rock paintings.

3.4 Open Ended Survey Responses

All respondents were asked at the end of the survey to comment further about Indigenous tourism in Australia. Approximately 560, or 41% of the 1,357 total respondents, provided a response to this question, although a number of these related to the survey or their trip in general. From these responses however, it was possible to extract a rich source of insightful qualitative data that identified a number of unprompted key themes and issues from the respondents' point of view. The following tables present a selection of the key comments by theme, by domestic (Table 3.69) and international (Table 3.70) respondents. Only themes with 3 or more citations by either domestic or international respondents are included[6].

For domestic visitors, a number of unprompted comments were made in relation to negative perceptions of Indigenous peoples or culture. However, almost as many respondents had positive comments and feedback on Australia's Indigenous tourism experiences and activities.

Table 3.20. Open Ended Survey Responses – Domestic Visitors

Theme	No. mentions	Example quote/s
Poor perceptions of Indigenous people/racism	17	I have not participated in Indigenous tourism and it is not my top priority with personal experience with Aboriginal communities
General positive comments	16	Aboriginal tourism is good for people to know Aboriginal culture
Personal Indigenous connection	15	I live in a town full of Aborigines
Lack of information/ advertising or poor promotion	15	Interested but didn't know any experiences were available
Previously experienced	12	Years ago I went to Kakadu and did some Aboriginal tours
Lack of interest	12	Absolutely not interested at all
Time constraints	8	Limited free time. On tour. Would probably do more if offered as part of tour extras
Concerns about authenticity/ quality	8	Very authentic personal interactions would be ideal, to learn about their way of life
Expressed interest	7	Aboriginal experiences haven't been priority in the past but now retired, it's a big priority
Different experiences sought	5	Just visiting family on this trip
Too expensive budget constraints	5	Australia is very expensive in general
Travelling with children	4	Hard to do with kids

International visitors focused more on the lack of information/advertising/promotion of Indigenous experiences in Australia and 53 separate comments were received around this theme. Seeking other experiences and cost were also noted. Again, a number of positive comments about Indigenous tourism related to this question.

[6] This was considered acceptable because a) it is qualitative data b) the open ended question allowed for any type of comment to be made, so if a theme appeared more than twice it was considered to be an issue.

Table 3.21. Open Ended Survey Responses – International Visitors

Theme	No. mentions	Example quote/s
Lack of information / advertising or poor promotion	53	After being in Australia for a month, I have never seen Aboriginal experiences promoted
Different experiences sought	21	On honeymoon. Want more luxurious experiences this trip
Too expensive/budget constraints	13	Backpackers – they have limited money to travel around, they wouldn't like to spend too much. If more interesting activities are for free, they would like go for it
General positive responses	13	Good initiative taken by Tourism Australia to promote Aboriginal tourism
Time constraints	12	It is very interesting but I have limited time.
Safety/comfort issues	11	Hesitant about doing some experiences alone
Lack of interest	10	Personally not interested in Aboriginal tourism
Authenticity	10	Would want to make sure that community themselves are benefitting from tourism and that it is not too commercialized and sometimes it is hard to evaluate whether it is authentic
General negative responses	9	Had Aboriginal guided tour in Uluru. Found it difficult to understand as her English was average
Previously experienced	8	Did most of the Aboriginal experience in previous trip in Australia
Seek experience in future	7	It's interesting, if have chance I would like to try in the future
Lack of opportunity/accessibility	6	Googled Indigenous experiences and didn't find anything in Melbourne. Was disappointed that there wasn't more Aboriginal things to see/do, especially at the museum
Poor perceptions of Aboriginal people / racism	4	Aboriginal issues can be an concern, such as, drinking alcohol, education

3.5 Putting the Results into Context: Extrapolating the Sample to the Population

For the purposes of extrapolating the study sample to the population (for key questions) it was *assumed* that the study sample represents the 'average' visitor to Australia. However, given that the study sample was biased towards markets that may be more likely to participate in Indigenous tourism (e.g. collecting data in tourist precincts in Darwin and Cairns), this may not be an accurate assumption. Therefore these results will overestimate the market and should be used with extreme caution. These results should be considered as the upper limits or maximum size of the potential market.

The International and National Visitor Survey produced by Tourism Research Australia are arguably the most reliable sources of visitor data for Australia. However, a key issue with these data sources is that they count trips taken, rather than actual visitors. That is, one domestic resident may take a business trip, a holiday and a day trip and they will be counted three times in the dataset. Clearly, this would inflate the estimates presented in this research. While counting trips rather than visitors is also an issue for the International Visitor Survey, this is less of a problem as international visitors are less likely to repeat visit multiple times in a year. Thus for this extrapolation section, only the international visitor estimates are presented. It should be kept in mind that due to weighting to trips, rather than visitors, the estimates in this section are likely to be an overestimate of the true size of the potential market.

Further, for this section, the international respondents collected in this research were weighted by origin to the International Visitor Survey 'population' data in order to provide some context to the study's findings. According to the International Visitor Survey, in the year ending June 2012 there were a total of 5,537,000 international visitors to Australia.

3.5.1 Awareness, Preference and Intention

All respondents were asked a series of questions that aimed to determine their: unprompted awareness of Indigenous tourism experiences vis-à-vis other Australian experiences; prompted preference for Indigenous experiences; and, whether they had or planned to undertake an Indigenous tourism experience. If the study sample is extrapolated to the population it could be assumed that almost 1.2 million international visitors have top of mind (unprompted) awareness of Indigenous tourism experiences. Of those international visitors who were aware of Indigenous experiences, only 60% or 644,000 visitors had a preference to undertake an Indigenous experience and only 29% or 316,000 actually intended to undertake/had already undertaken an Indigenous experience while on their trip (Table 3.22).

Table 3.22. Awareness, Preference and Intention/Visit Extrapolation – Weighted Estimates

	International visitors ('000)
Awareness (Unprompted): Visitors 'top of mind' awareness of Indigenous tourism experiences	1,078
Preference (Scaled down by unprompted awareness): Visitors who rated undertaking an Indigenous experience as very important to extremely important (developed from the 5 indigenous experiences*)	644
Intention/Visit (Scaled down by unprompted awareness): Total visitors who stated they had or planned to undertake an Indigenous experience while on their trip (developed from the 5 indigenous experiences)	316

*Visitors ranked at least one of the following experiences a 4 or 5 on a 5 point scale: 'Go on a tour with an Aboriginal guide', 'Stay with an Aboriginal host (in Aboriginal owned/run accommodation', 'Visit an Aboriginal cultural centre / gallery', 'See an Aboriginal performance' and 'Visit an Aboriginal site or community'

3.5.2 Indigenous Tourism Scenarios

Visitor respondents were asked a series of questions relating to eight Indigenous tourism experience scenarios. The most appealing of the experience scenarios for international visitors was a full day tour with an Aboriginal guide; extrapolating to 3.3 million international visitors. The least appealing experience was staying overnight in a remote Aboriginal community or on Aboriginal land; extrapolating to 1.9 million international visitors.

The international respondents were also asked to state whether they had ever previously undertaken an Indigenous experience in Australia or intended to do so in the future. The Indigenous experience most likely to be/had been undertaken was attending an Aboriginal museum display (extrapolation 2.1 million visitors) while the least likely to be undertaken was staying overnight in a luxury cabin on Aboriginal land (extrapolation 770,000 visitors). Again, these figures should be viewed with caution as the upper limits of a potential market. As noted elsewhere in the report there is a tendency for respondents to overestimate their future intentions.

International respondents were also asked how much they had paid or were willing to pay for each of the Indigenous tourism experience scenarios. Due to the expenditure figures being collected as a categorical rather than continuous variable, it was necessary to extrapolate out to a total expenditure range, rather than a point estimate. Therefore, this modelling exercise estimates maximum potential for expenditure on an Indigenous tourism experience in a range. The Indigenous experience with the highest total expenditure range was undertaking a full day tour with an Aboriginal guide. The experience with the lowest expenditure range was the Aboriginal museum display. Although the museum based experience had the highest potential for visitation it had low potential for revenue generation.

Table 3.23. Key International Visitor and Expenditure Statistics by Scenario Experience – Weighted Estimates

Appeal and Intention to undertake	Two hour walking tour with an Aboriginal Guide	Stay overnight in a remote Aboriginal Community/ on Aboriginal land	Experience an Aboriginal cultural show / performance	Stay overnight in a luxury cabin on Aboriginal land	Experience an Aboriginal museum display	Full day tour with an Aboriginal guide	Half day adventure activity with an Aboriginal guide	Visit remote Aboriginal rock paintings or carvings
No. of international visitors who found the experience very to extremely appealing	2,814	1,850	2,703	2,239	2,717	3,275	2,891	2,762
No. of international visitors who have/intend to undertake the experience	1,456	919	1,907	770	2,111	1,637	1,220	1,457
Willingness to pay								
Median per visitor expenditure range	$1-50	$51-100	$1-50	$101-200	$1-50	$101-200	$51-100	$1-50
Total Expenditure Range	$99-215 Million	$112-209 Million	$79-178 Million	$178-340 Million	$33-121 Million	$211-448 Million	$97-205 Million	$108-237 Million
Free	9%	5%	17%	4%	33%	5%	8%	18%
$1-50	36%	20%	43%	7%	51%	13%	24%	30%
$51-100	31%	31%	24%	18%	7%	26%	37%	24%
$101-200	16%	30%	13%	43%	6%	29%	24%	16%
$201-500	6%	9%	2%	18%	3%	22%	5%	8%
$501-1000	1%	2%	0%	7%	0%	3%	2%	3%
$1001 or More	1%	3%	1%	3%	0%	1%	1%	1%

Note: The scenarios asked the international respondents whether they have previously or would undertake the experience in the future. Therefore this represents the maximum potential market as some people may have already undertaken the experience and may not do so again.

Chapter Four: Results – Indigenous Tourism Operator Interviews

In-depth, semi-structured, face-to-face interviews were undertaken with a sample of 34 Indigenous tourism operators across Australia. The interview guide (Appendix 2) included questions around the:

- Business operating environment
- Perceptions of visitor demand, motivations, expectation and satisfaction
- Perceptions of barriers and challenges to visitor demand
- Authenticity
- Chinese visitor market (presented in Chapter 6).

Specific details about the type, structure and size of each of the 34 Indigenous tourism operators is outlined in Chapter 2. Throughout this Chapter, participant quotes are provided in italics. Appendix 7 presents a selection of quotes provided by participants for each question.

4.1 Context

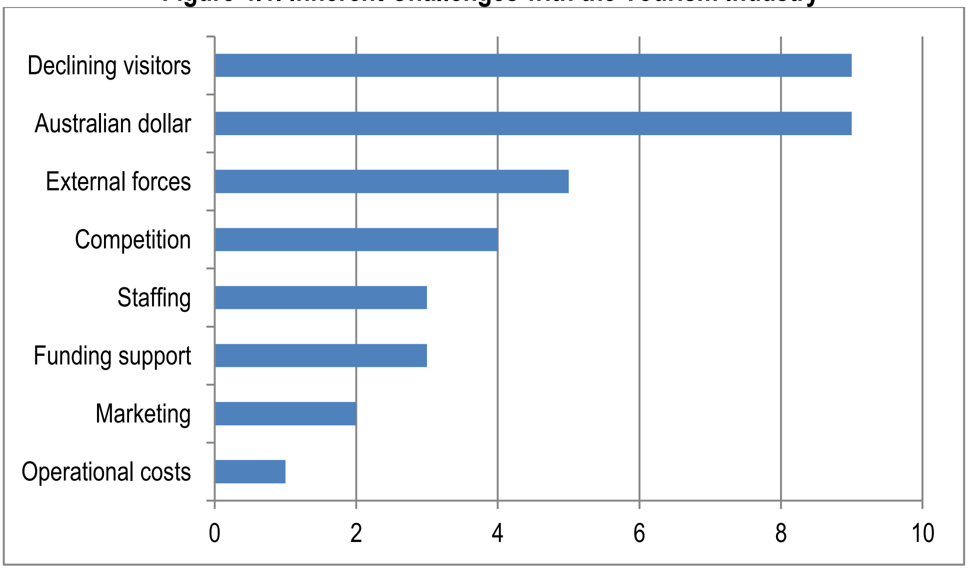
Several context setting questions were posed to interview participants to identify background information about their business and its current issues and challenges. For instance, most Indigenous tourism operators reiterated the challenge associated with the current economic environment. Lower international visitor numbers ("*we are more than 50 per cent down on what we should be at the moment…but the volume is way down on both - way down"*) and the high Australian dollar, with its impact on both inbound and outbound tourism (*"I've tried to adjust and readjust and readjust my prices…but I'm getting so close to my…purchase price…but it just gets to a point where you can't do anything about it"*).

Macro challenges included: intensifying competition with an increasing number of Indigenous tourism businesses entering the market ("*my biggest issue is…with xxxx opening; the awareness of that is brilliant"*); competition with the mining industry for available accommodation stock (*"quite a bit of accommodation has been taken up by people involved in mining and gas exploration. That only puts up the pressure on the prices, the room prices"*) and seasonality (*"the weather has a lot to do with it In terms of my business"*).

Micro challenges noted by interview participants included: sourcing, training and retaining appropriate staff generally (*"finding the people with the degree of skill and the degree of commitment, like getting* *some people with the commitment but without the skills"*) and Indigenous people specifically (*"we employ Aboriginal guides where we can…That's one of the big problems I have with the whole thing. We can't get Aboriginal guides. I train Aboriginal people in tourism and have for many, many years and trained many, many people. Just getting them to stay is virtually impossible"*). Other micro challenges included meeting increasing government regulations (i.e., permits, accreditation) and the difficulties associated with living and working in a remote location (i.e., increased operational costs).

When asked to identify any inherent challenges of operating in the tourism industry, the interview participants again noted some of the same challenges (Figure 4.1) as well as external forces such as the weather (i.e., cyclones, floods, etc.). Other challenges were seen by several participants to include a lack of sustainable funding support ("we would really like to diversify our funding sources further to make us more independent"), the lack of business savvy Indigenous employees (*"the lack of ready, willing and able cultural Aboriginal people"*), and marketing (*"obviously trying to get more people through the door, more exposure"*).

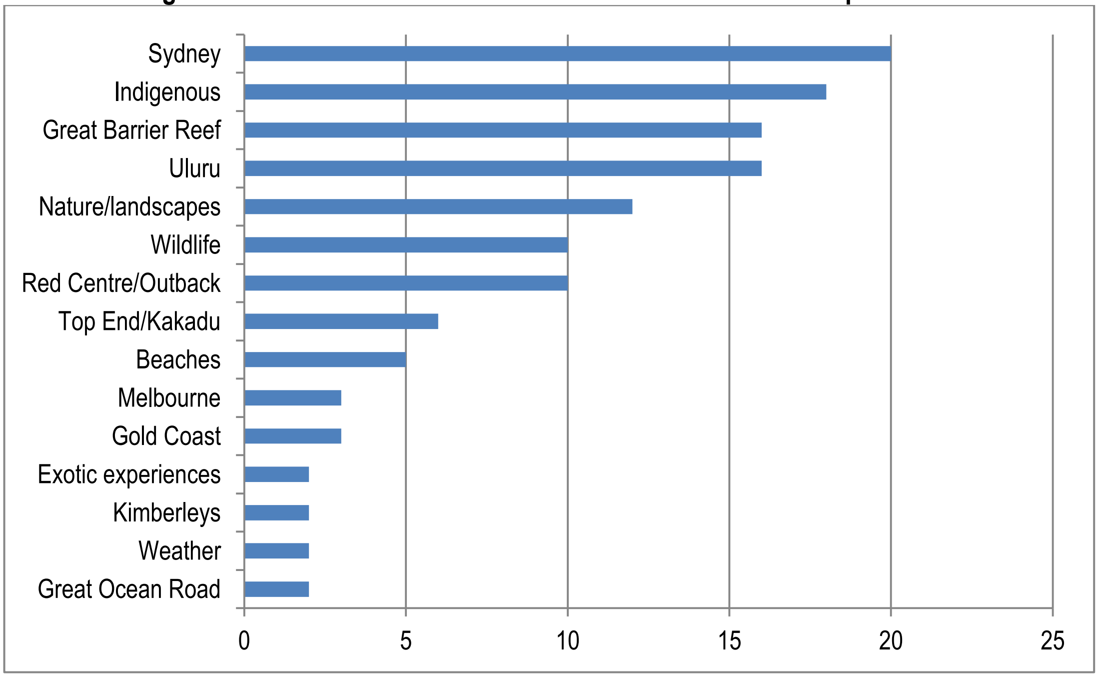
Figure 4.1. Inherent Challenges with the Tourism Industry



4.2 Indigenous Tourism Operator Perceptions of Visitor Demand

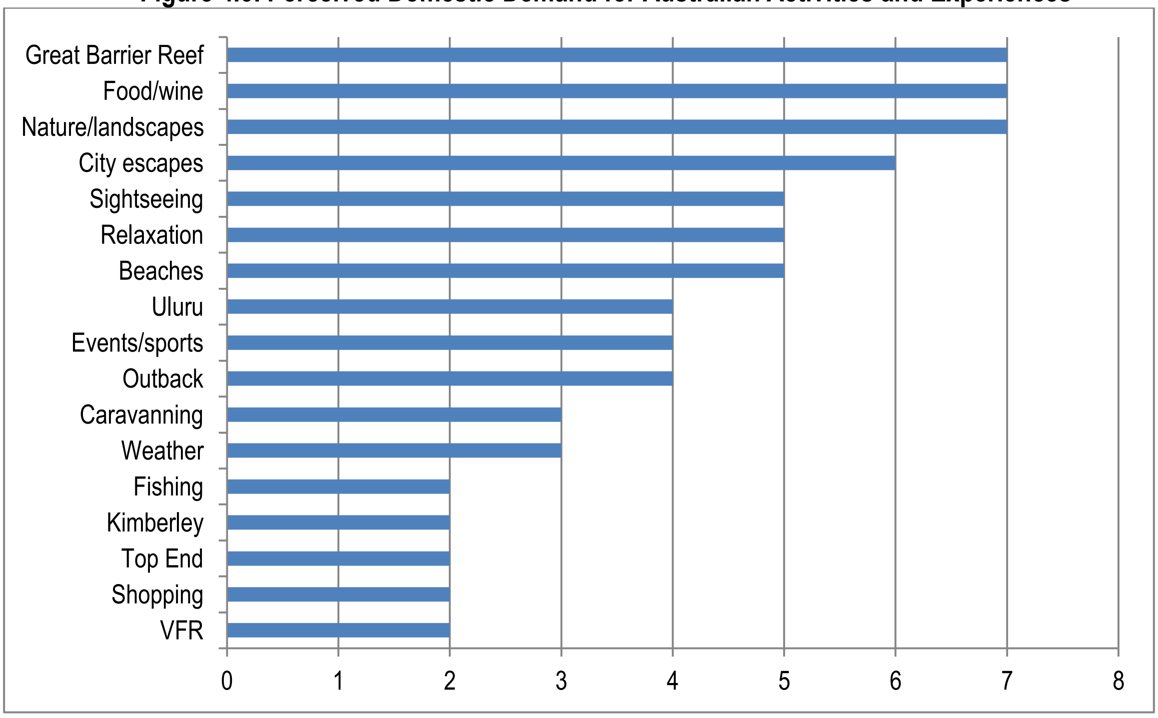
The operators interviewed for this research believed that most international visitors are coming to Australia to see and experience Sydney's attractions. Responses were coded into 15 different attractions with Indigenous experiences, the Great Barrier Reef and the Outback considered to be strong pull factors for international tourists (Figure 4.2).

Figure 4.2. Perceived Demand for Australian Activities and Experiences



For domestic tourists, operators noted nature/landscapes, food and wine, and the Great Barrier Reef as the attractions or experiences domestic tourists were seeking (Figure 4.3). City escapes, beaches, relaxing and sightseeing were also perceived as popular activities for domestic tourists.

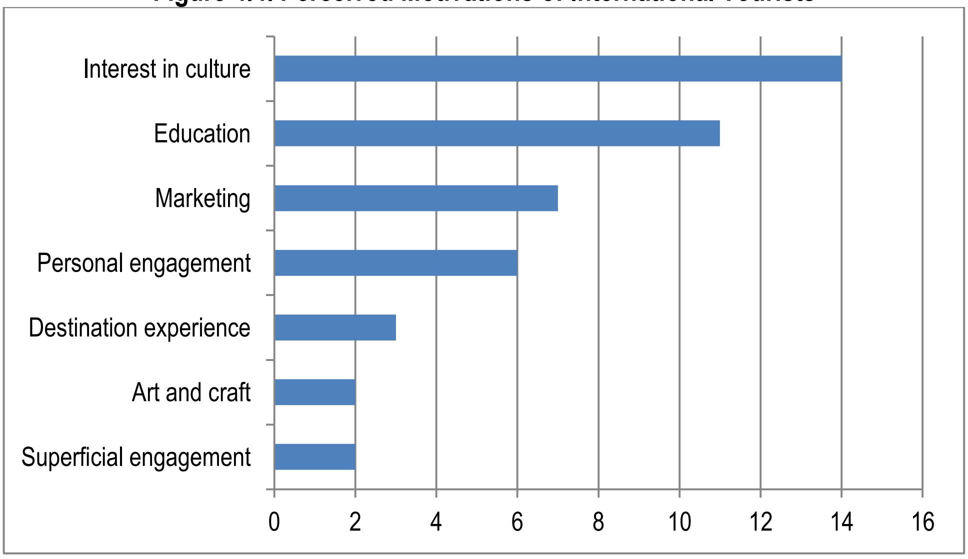
Figure 4.3. Perceived Domestic Demand for Australian Activities and Experiences



4.3 Indigenous Tourism Operator Perceptions of Visitor Motivations

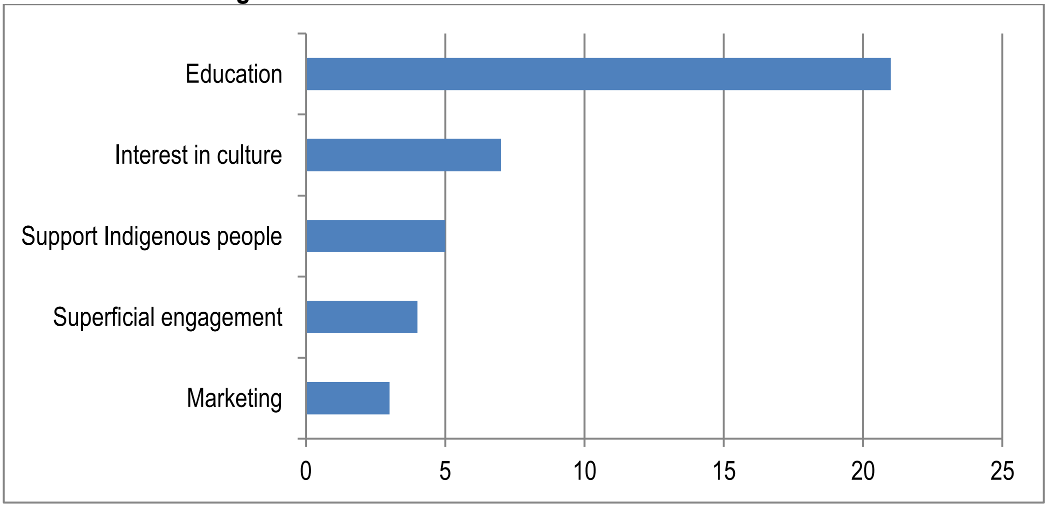
Indigenous operators were asked what they believed motivates international and domestic tourists to seek out an Indigenous experience whilst holidaying in Australia. For international visitors, the most frequently cited reason was an interest in Indigenous cultures and for education (*"because everyone wants to have a cultural experience in each country that they visit. If you go to Vietnam you want to learn and understand the culture. We've got the oldest living culture on the planet. Each country that you visit, you know, people want to have a better understanding of the culture"*) (Figure 4.4). Others discussed their belief that destination marketing is a motivating factor for international tourists (*"it's been promoted pretty well worldwide, coming out to learn about Aboriginal heritage and culture. I think that helps it"*).

Figure 4.4. Perceived Motivations of International Tourists



Indigenous tourism operators believed domestic tourists share similar motivations to international tourists in that they are motivated to participate in Indigenous tourism activities/experiences for education reasons (*"well I think maybe it is having a little bit of knowledge and wanting to explore it more"*) and an interest in Indigenous cultures (*"I think people are still interested in the culture"*) (Figure 4.5). Some operators felt that domestic tourists want to support Indigenous tourism ventures (*"I think it's that desire to help"*) while others felt that there is little motivation for the domestic market aside from superficial engagement (*"I think the Australians are looking more for the, on the surface, for something fun and exciting because when you grow up here, you do have that exposure in school, there's all these little excursions you do"*).

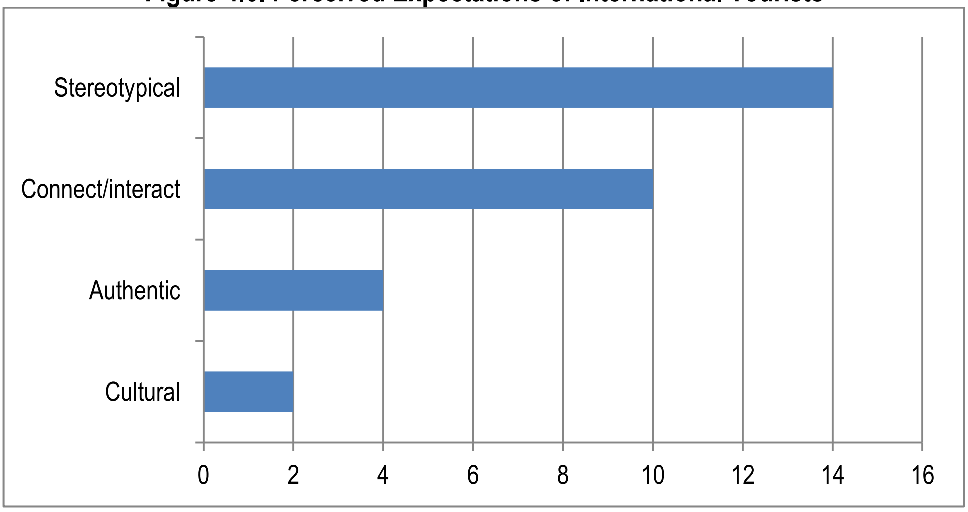
Figure 4.5.Perceived Motivations of Domestic Tourists



4.4 Indigenous Tourism Operator Perceptions of Visitor Expectations and Satisfaction

Indigenous operators were asked what they believed international and domestic tourists expect from an Indigenous tourism experience. A number of the operators interviewed believed that a stereotypical Indigenous experience is the primary expectation of a large proportion of international visitors (*"sitting with a lap-lap on and a painted bloody face. Eating witchetty grubs"*) (Figure 4.6). However, a number of other participants thought international visitors were looking for an opportunity to engage with an Indigenous person (*"it's hearing the Dreaming stories, the Creation stories, it's maybe learning about their family structures, tasting some bush food. It's just that hands on sort of thing, the hands on interaction and being able to ask questions and just talk to them"*) in a culturally authentic experience (*"they want to meet real people not staged stuff"*).

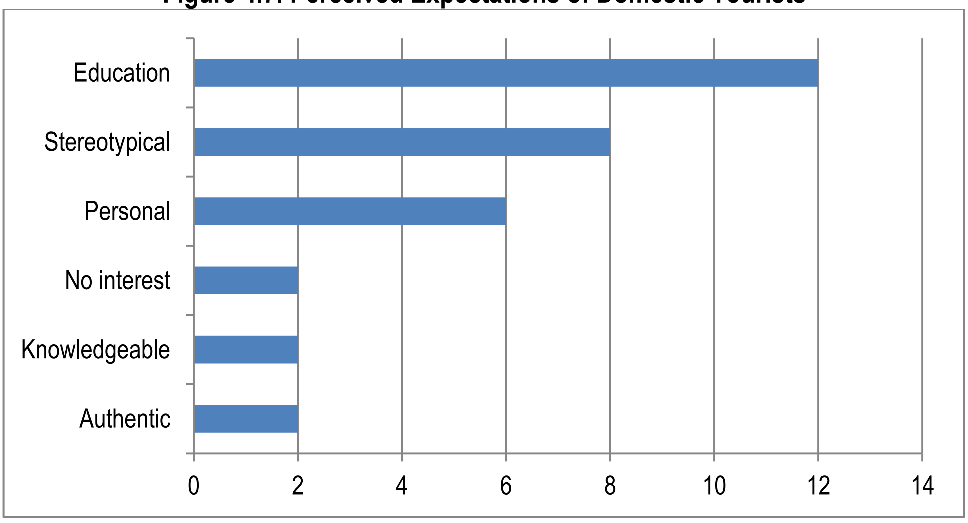
Figure 4.6. Perceived Expectations of International Tourists



The operators interviewed thought domestic tourists' were expecting an opportunity to learn about Indigenous culture (*"I think your domestic tourist it's more for informative experiences so they can walk away with a bit more knowledge about what's going on in their own country"*). Some operators believed Australians were also looking for a stereotypical Indigenous experience (*"they expect to see a couple of Aboriginal people running around in traditional paint and dance for them"*), while others wanted an opportunity to meet and engage with an Indigenous person (*"for the first time they've actually had the opportunity of speaking with an Indigenous person, sitting down and answering any questions you want, go and throw a boomerang…they've probably never had that opportunity if you come from down south in the big smoke"*).

All of the Indigenous tourism operators said they receive positive feedback and have high levels of satisfaction from visitors. The interview participants noted: good feedback (8), high levels of satisfaction (6), and happy with experience (4) (*"extremely satisfied, over the top satisfied, just ridiculously"*). Several participants (3) noted they have received negative feedback but this was in relation to a lack of interest in the experience (*"I think any negative feedback we've had is those people that are not wanting to engage with the Indigenous experience"*) and where Indigenous guides were not used (*"I think there is always a disappointment or certainly a sense of surprise that the guides that we are able to provide are non-Indigenous. That's probably our biggest"*). The methods used by Indigenous tourism operators interviewed in this study to gauge visitor satisfaction included feedback forms, word of mouth, on line feedback and surveys.

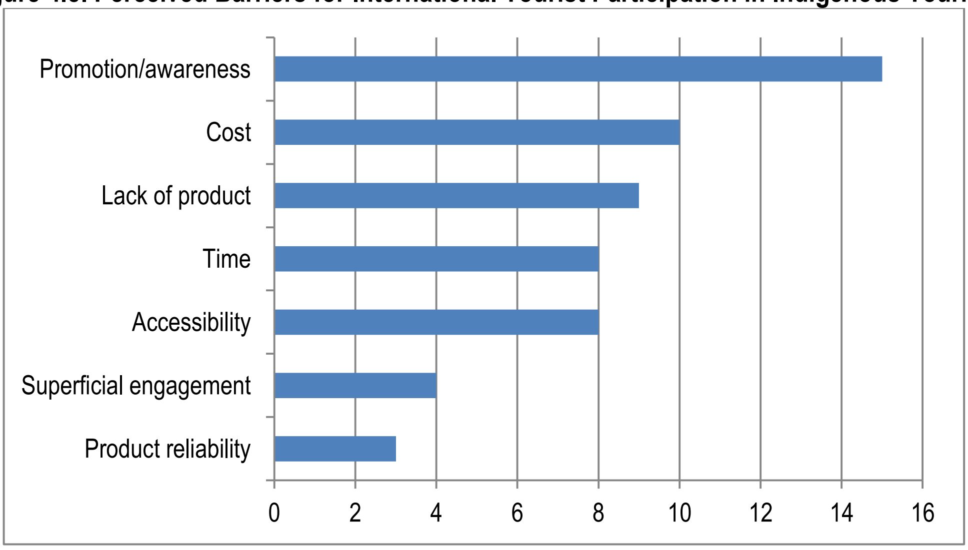
Figure 4.7. Perceived Expectations of Domestic Tourists



4.5 Perceived Barriers to Tourist Demand for, and Participation in, Indigenous Tourism

Indigenous tourism operators were asked to identify what they believed to be the barriers impacting on international and domestic tourist demand for Indigenous tourism experiences in Australia. For international tourists, the most frequently perceived barrier was the lack of promotion and lack of product awareness (*"I guess some people, maybe they just don't know what an Indigenous experience is. I mean Tourism Australia are doing an enormous amount, at the moment, of work on that. It's a big focus of theirs and they're doing great work. But change is a slow thing sometimes"*). Other barriers included: the cost of the experience (*"maybe they don't want to pay for it. My tours aren't cheap…because I run small groups"*); a lack of available and reliable products (*"I've even had international tourists travelling through the north of Australia, travelling through Alice Springs, wanting to do an Aboriginal tour and they still can't find one"*); accessibility (*"many Indigenous experiences are in regional and remote areas, access is hard"*) and time constraints. Several participants remarked on a lack of interest or only demand for fairly superficial experiences (*"the trouble is with the Australian Tourism, they reckon international people want an Indigenous experience. That's not correct"*).

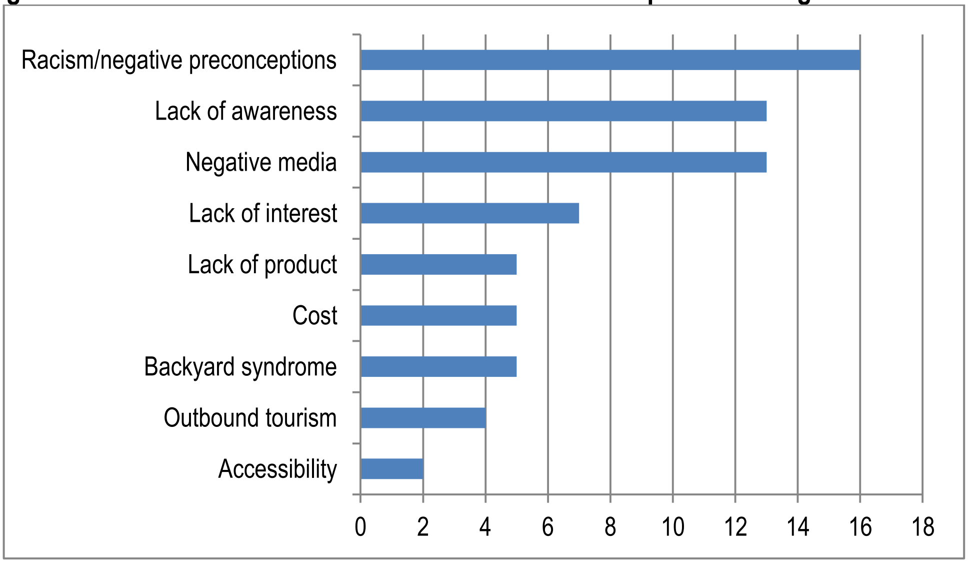
Figure 4.8. Perceived Barriers for International Tourist Participation in Indigenous Tourism



The Indigenous tourism operators interviewed thought there were a range of barriers inhibiting domestic market participation in Indigenous tourism (Figure 4.9). Racism and negative perceptions were considered to be a barrier by many of the operators ("*I try not to get into negative, stereotypical stories or anecdotes because they're often in the minority. But there's no doubt that there are attitudes and preconceptions of - within Australian mainstream society"*), as was negative media attention (*"if they believe everything they see on television, they would probably run a mile"*). Operators also noted: a lack of awareness amongst the domestic market about Australia's Indigenous tourism offerings (*I think most Australians, most of the domestic market, don't even think that having an Indigenous experience is a possibility"*), and a lack of interest (*"aside to that is that people's views on Aboriginal people generally mean that they're not all that interested in finding out about how rich the culture is"*).

Operators were also asked if there were any challenges in meeting the demands and expectations of tourists. A number of participants (12) said there was a challenge with delivering a commercially viable product that meets the expectations of visitors (*"well some of them want more than what you're going to give them. They want the whole bang…it depends on what they want to pay"*). Others mentioned providing high standards of service (3) (*"communication is our biggest challenge, it's getting in touch with some of these people"*), and meeting stereotypical expectations (2) (*"because particularly overseas visitors who perhaps the tour companies are bringing in, would like to see Indigenous tour guides"*). A number of operators (5) noted no real challenges as their product met all expectations of visitors.

Figure 4.9. Perceived Barriers for Domestic Tourist Participation in Indigenous Tourism

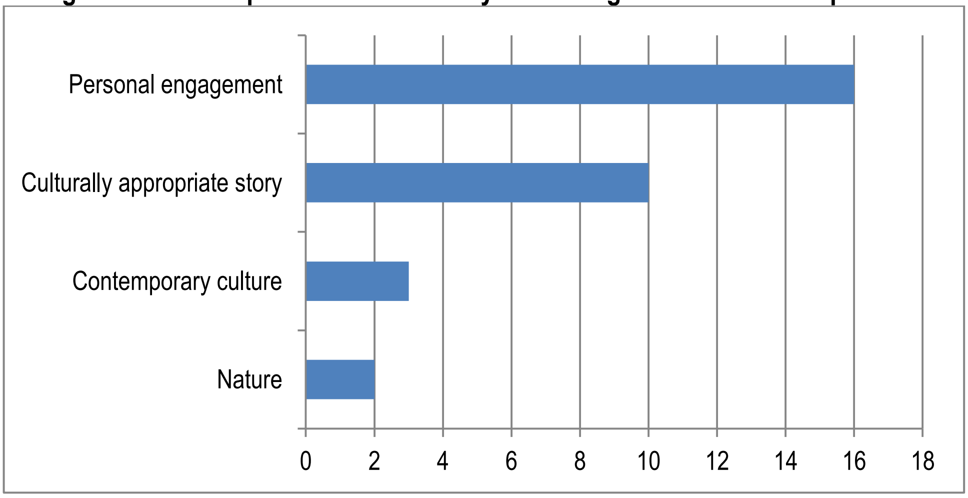


4.6 Authenticity in Indigenous Tourism Experiences

Although the objectives of this research were to examine demand and supply for Indigenous tourism, given the importance and attention placed on authenticity in cultural tourism generally, and Indigenous tourism specifically, several questions around authenticity were included in the operator interviews. Questions were also posed to international and domestic tourists regarding authenticity.

The results of this study indicated an authentic Indigenous tourism experience can take the form of a variety of experiences. According to the majority of operators, an authentic activity is one in which the visitor has the opportunity to engage with an Indigenous person/s (*"to me authenticity is in the delivery of the product and by an Indigenous guide"*), while others perceived authenticity in terms of telling a culturally/traditionally appropriate story (*"authentic for us is telling the right story and not telling someone else's story"*). Additionally, some saw authentic experiences as those portraying contemporary culture (*"I think authentic now is just meeting the people as they're living their lives today"*) while others believed some engagement with nature (*"an authentic one would be out - actually outdoors"*) constituted and authentic experience (Figure 4.10).

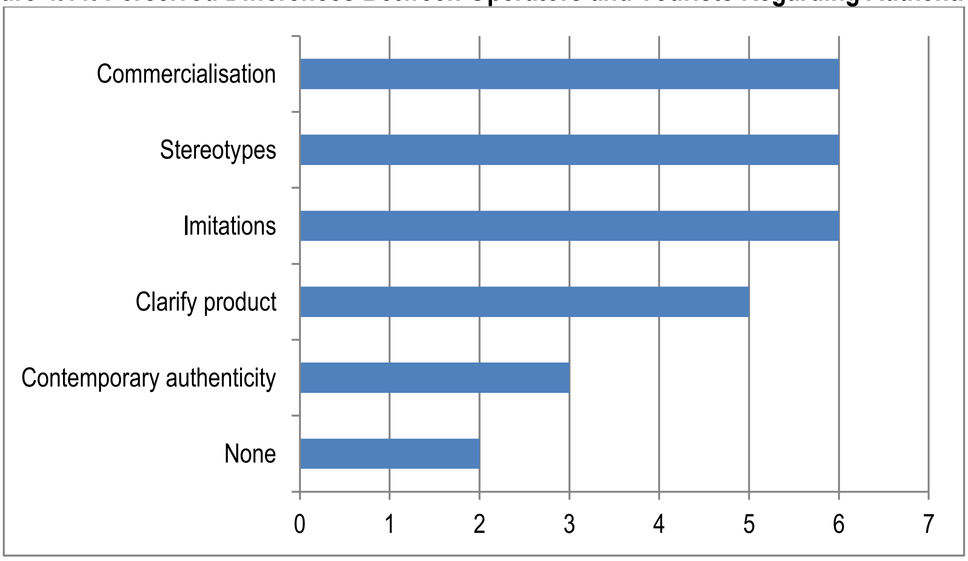
Figure 4.10. Perceptions of Authenticity in an Indigenous Tourism Experience



Thus results of this study reiterated the complexity of the concept. Moreover, the heterogeneous nature of authenticity was confirmed after mapping the differences between operators and tourists' perceptions of authentic experiences. Very few operators (2) felt there were no differences. Others operators discussed the need to move away from what they considered to be an authentic experience and commercialise the product (*"really I don't know of anywhere in Australia that does an authentic…an outside, outdoor dance performance sort of thing…you've got to make sure people are safe and secure and comfortable. They're paying dollars…they want to have a nice cold beer while they're doing it and a nice meal afterwards or something"*). Some operators were concerned with visitors' stereotypical expectations of Indigenous culture and operators raised concerns about imitations and fake experiences (*"you walk into every shop in Alice Springs and they've all got didgeridoos. The didgeridoo was never played in Central Australia"*). Importantly, some operators also discussed the need to accept contemporary lifestyle as authentic (*"I don't want to buy a painting unless it's done with ochre, real ochre. Well the people don't use ochre that much. They're using acrylics and the people say that's not authentic. Well, if the people are using it, that's what they choose to use as a medium, isn't it authentic?"*). Importantly, the 'original' is a product of the evolving present (Taylor 2001) as they are constantly created and (re)invented with community perceptions, which are also constantly changing (Olsen 2002).

While there are differences between operators and visitors with regard to perceptions of what constitutes an authentic Indigenous experience, operators all stressed the importance of maintaining authenticity (in its various forms) in tourism offerings (*"like our art, we want it to be authentic, we want it to be from the area…if we're doing a piece of merchandise, selling a drink bottle we try to put some xxxx art on it and try to really make it sort of representative of people. So, yeah, our authenticity and sort of natural heart about the business I think is very, very important to us"*). Another operator, while agreeing that it is important to provide visitors with authentic Indigenous experiences stated: *"I think it is but practically - practicality-wise it's not really possible"*.

Figure 4.11. Perceived Differences Between Operators and Tourists Regarding Authenticity



The ownership and management of Indigenous owned and operated businesses also sparked debate around authenticity. Such issues (i.e., what constitutes an authentic Indigenous experience within the context of Indigenous guides and visitor perceptions), were certainly raised several times by respondents. Most operators (20) believed it is important to tourists that Indigenous tourism businesses are Indigenous owned and operated (*"people want assurances that they're buying something ethical and we have to say…where is this money going to…that's the sort of question we get asked all the time"*). Yet other respondents (10) did not think it was important and/or necessary for Indigenous businesses to be Indigenous owned and operated. As one respondent noted:

"I think it's the experience on the day that's the really important thing. Indigenous owned - I mean I think you'd probably love to think that they're supporting something that's 100 per cent Indigenous owned so that all the money is going back into that Indigenous family and community but the reality is some experiences wouldn't work just by being Indigenous owned. So I don't know, I've never - it's not a question I've really asked them. They want to know if the guide's Indigenous".

Chapter Five: Discussion – Stage One

The objective of the research was to undertake a gap analysis of the demand for, and supply of, Indigenous tourism in Australia. The impetus for this study was borne from a widely recognized gap in knowledge about the demand patterns of international and domestic visitors for Indigenous tourism in Australia. While previous research has shown that tourists express reasonably high levels of interest in Indigenous tourism, the results of this study point towards evidence of a disconnect between tourists' interest in, and partaking of, Indigenous tourism experiences. In short, reported interest has not translated into visitation and expenditure. For instance, in scoping this research study, one of the project stakeholders noted that, "real demand for Indigenous cultural tourism has not been effectively demonstrated through existing research. In some studies of demand, there has been a tendency towards optimistic projections of the value of the Indigenous cultural tourism market". It was noted by way of example, that "definitions of Indigenous tourism may not exclude free or low-cost experiences in major centres, meaning that demand and price sensitivity for Indigenous tourism beyond those easily-accessible experiences cannot be determined". It is within this context that this research was instigated to explore the 'real' or actual visitor demand through a research design that sought information, not represented in previous studies of the market.

An important part of this study was also to map the findings from the visitor study against the voices, experiences and insights of Indigenous tourism operators. The objective was not only to draw out further insights from those at the 'front line' with regards to the realities, challenges and opportunities of the tourism sector, but also to explore the extent to which the Indigenous operators views of the tourist market were consistent with the opinions of the tourists themselves. The objective of identifying and then mapping the gap was to ascertain any points of disconnect that, when going forward, can be used by policy makers, agencies and operators to underpin the development of more sustainable Indigenous tourism business enterprises. Specifically, the findings will have implications for future product development, funding decisions, marketing strategy and policy development.

This chapter draws together and discusses, the findings of Stage One of the study which was to: 1) investigate the expectations, experiences and motivations of both international and domestic tourists regarding Indigenous tourism products and services in Australia via a visitor survey undertaken with 1357 international and domestic tourists (Chapter 3); and, 2) investigate the expectations, experiences and motivations of Indigenous tourism operators regarding the provision of activities and experiences to the visitor market via 34 in-depth interviews with Indigenous tourism operators (Chapter 4). The preceding Chapters have reported on the findings from each of the questions in detail. This Chapter presents these results cumulatively and where appropriate, maps the responses of the international and domestic tourists against those of the Indigenous tourism operators. Specific focus is given to: mapping demand for Australian tourism experiences, mapping awareness, preference and visitation along the attrition curve; mapping the barriers to participating in Indigenous tourism; and, mapping the appeal, intentions and willingness to pay on a series of Indigenous tourism scenarios. Authenticity and Indigenous tourism are also discussed.

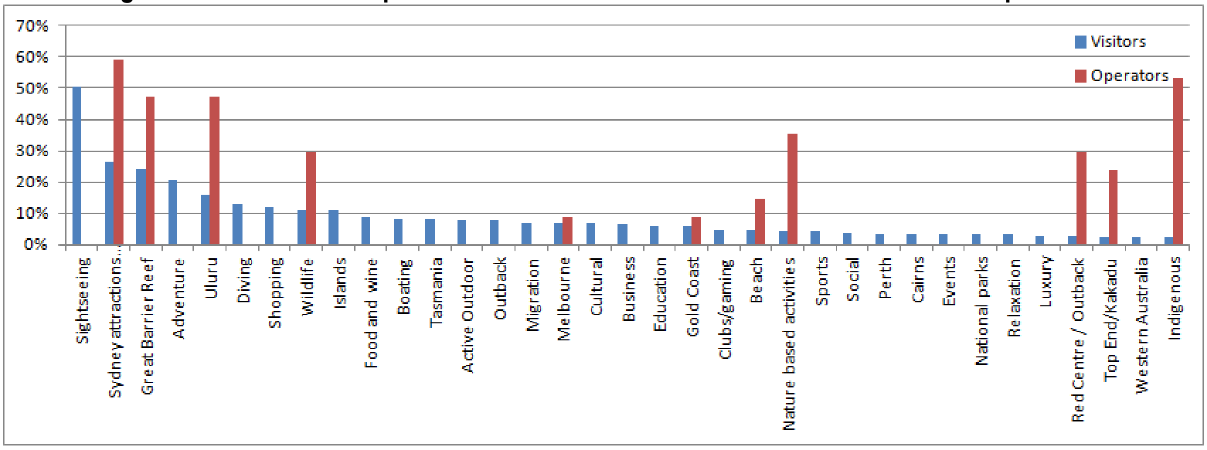
5.1 Australian Tourism Experiences: Mapping Demand

From the data, comparisons can be made between tourist and Indigenous tourism operator perceptions of the 'top' or 'must see' tourist attractions or experiences in Australia. This is presented for both international (Figure 5.1) and domestic (Figure 5.3) tourists. Tourists were asked: "if you had unlimited time and money what are the top five things you would like to do while in Australia?" and operators asked "what activities and experiences do you think international tourists are coming to Australia for?" For the visitor respondents these were unprompted questions to ultimately elicit, relative to other Australian attractions and experiences, the spontaneous or unprompted awareness of, and interest in, Indigenous tourism experiences.

International visitors identified numerous options (for the full list see Appendix 8), with the most frequently cited attractions or experiences including: general sightseeing, adventure activities, Sydney/Sydney based attractions, the Great Barrier Reef, wildlife, boating, diving, food and wine, and Uluru. In contrast, none of the operator participants mentioned sightseeing or adventure activities, but they did note Sydney, Great Barrier Reef, wildlife and Uluru (Figure 5.2). However, the relative importance the operators placed on these particular attractions for the international market was considerably higher than the international tourists themselves[7]. Similarly, operators, in comparison with tourist respondents, overestimated the unprompted demand for Indigenous tourism, nature based activities, Top End/Kakadu and Red Centre/Outback. This 'disconnect' can be seen in Figure 5.1 where operators largely underestimated the breadth of activities that international visitors would like to undertake (hence a pooling within only a few activities).

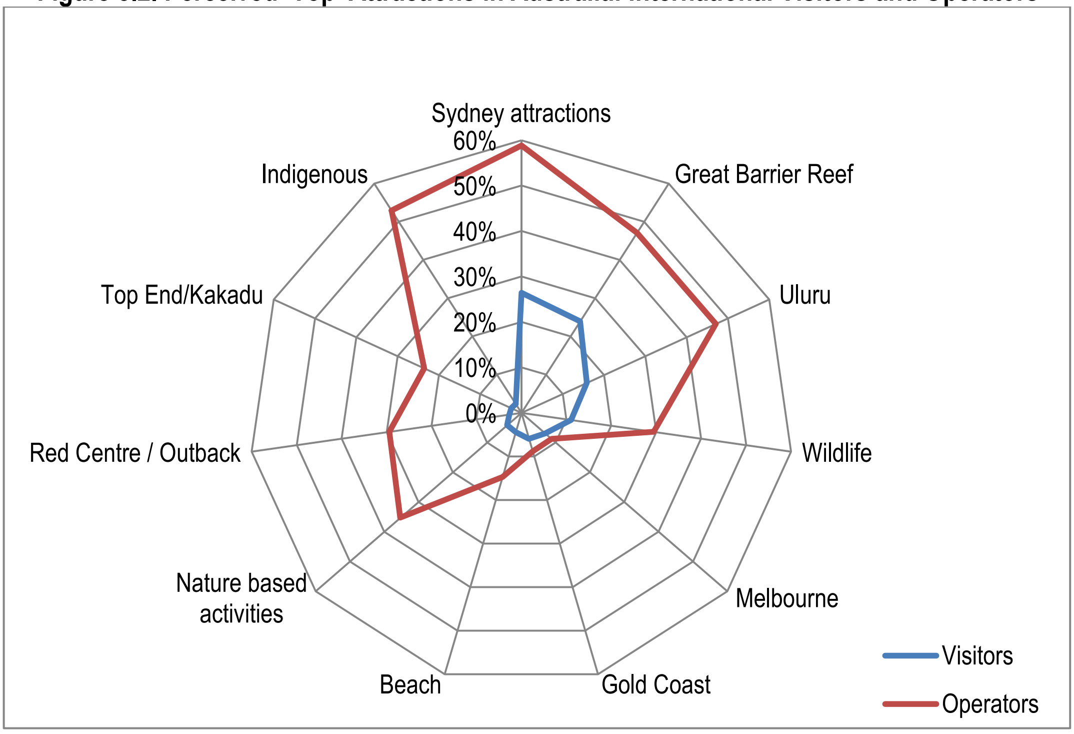
[7] A sample effect should be noted in conjunction with these results i.e., a small number of operators compared to a high number of visitor respondents where responses have higher levels of variance.

Figure 5.1. Perceived 'Top' Attractions in Australia: International Visitors and Operators



*In order of most frequently cited international visitors responses

Figure 5.2. Perceived 'Top' Attractions in Australia: International Visitors and Operators



In terms of the domestic market there was more alignment between visitors and operators to this question. General sightseeing, the Great Barrier Reef, city escapes, food and wine, Kimberley, nature based activities and Western Australia were all noted by both tourists and operators as the 'top' attractions for domestic tourists in Australia. For a full list of the activities and experiences cited by domestic respondents see Appendix 9. Again, cognizant of sample effect, the operators were relatively concentrated in their responses, citing fewer attractions and experiences than the visitor respondents (Table 5.3 and Figure 5.4).

Figure 5.3. Perceived 'Top' Attractions in Australia: Domestic Visitors and Operators

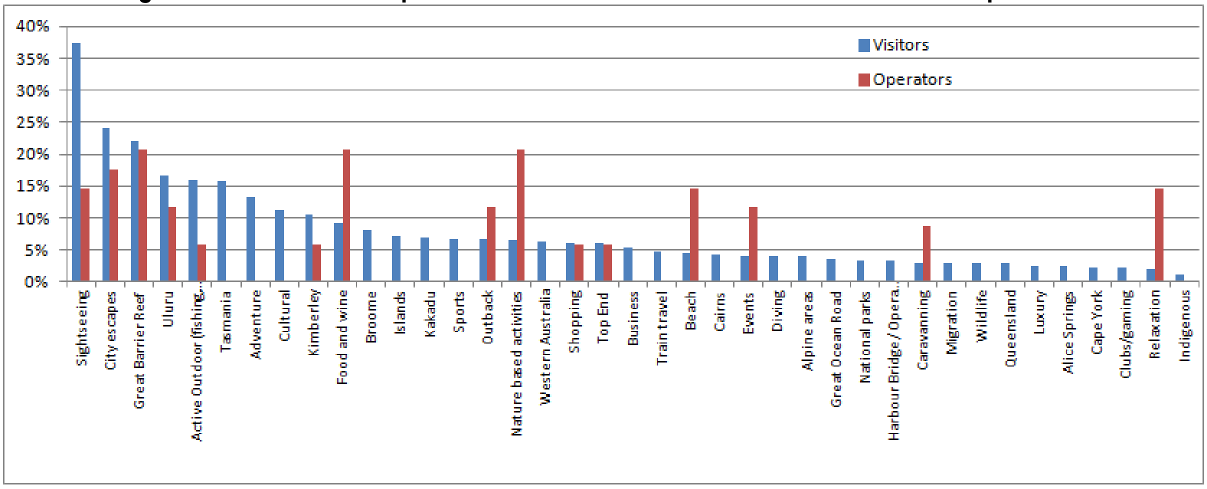
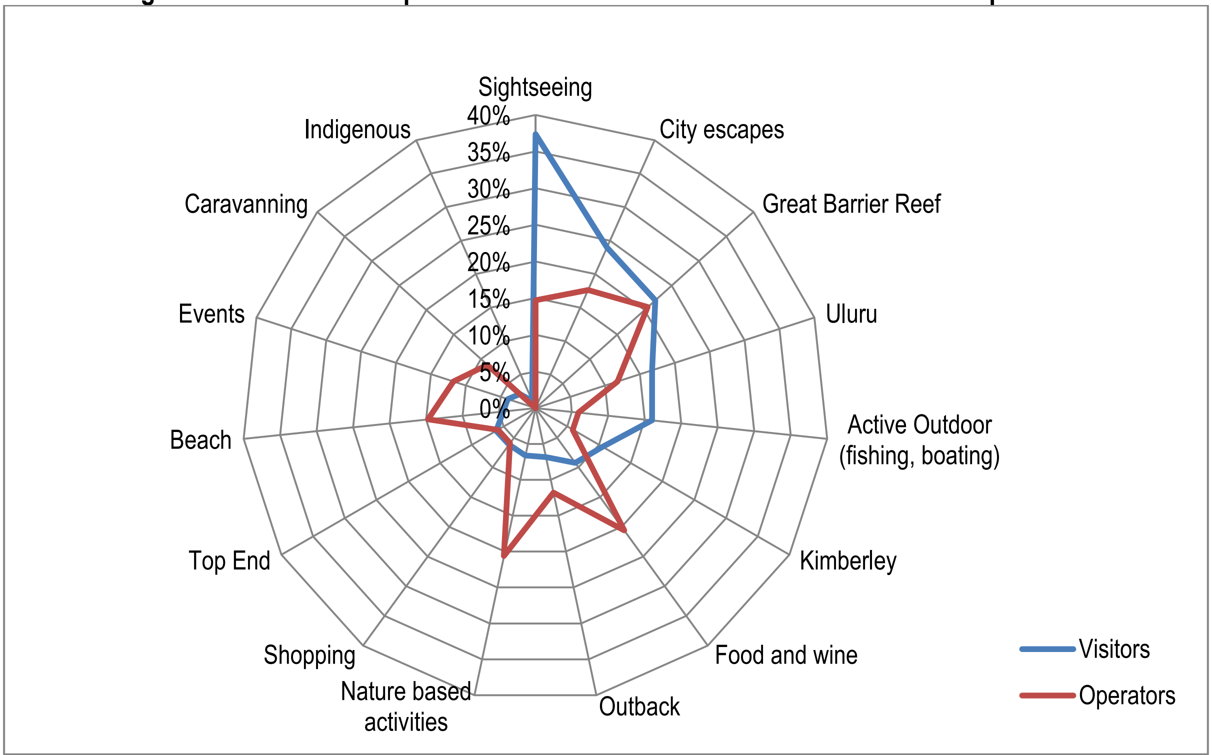


Figure 5.4. Perceived 'Top' Attractions in Australia: Domestic Visitors and Operators

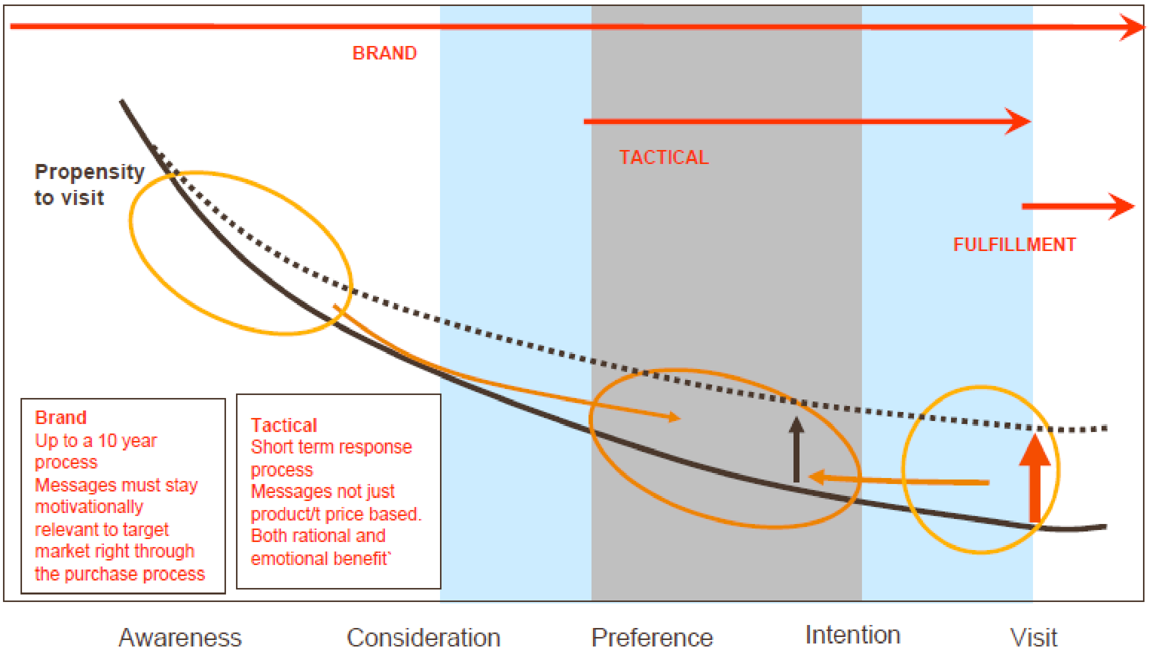


These findings highlight a disconnect between the Indigenous tourism operators' perceptions of the visitor market and what Australia's visitor markets are looking for in a tourist experience. This was particularly the case for the international market, where operators considerably overestimated the demand for Indigenous tourism products and experiences; confirming the assumptions of the project sponsors that ultimately led to the commissioning of this study. Over 50% of operators interviewed believed international tourists are coming to Australia for Indigenous experiences, second only to Sydney attractions. However, less than 5% of international visitors cited Indigenous tourism as a 'top of mind' attraction or experience in Australia. Similarly, operators overestimated the demand of international tourists for attractions such as Uluru (3rd) and the Red Centre/Outback (6th); a result that is not in line with either visitor responses or actual visitor travel patterns.

5.2 Attrition Curve: Mapping Awareness, Preference and Visitation

Tourism Australia (2005) uses the 'Attrition Curve' to represent a traveller's destination or product choice from awareness, preference, and intention through to visit (Figure 5.5). Awareness is the unprompted recall of a product from long-term memory, as well as aided recognitions. Unprompted awareness is strongly linked with positive attitudes, intentions to purchase and actual purchases (Woodside & Lysonski, 1989). Travellers develop their preferences from their product awareness, combined with their emotional associations (Woodside & Lysonski, 1989). Preferences related to the travellers' rankings assigned to products from most liked to least liked. Intention to purchase is a traveller's perceived likelihood of purchasing a product within a specific time period.

Figure 5.5. Attrition Curve

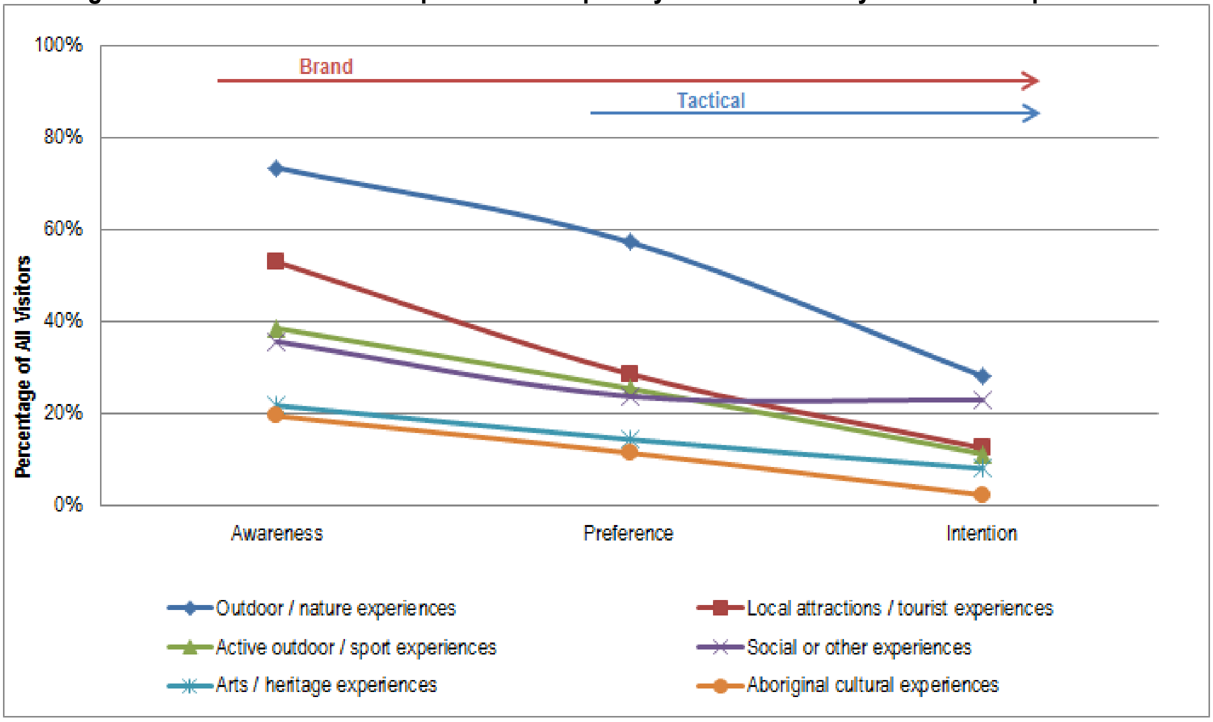


Source: Morrison (2005)

The tourist survey design allowed for certain questions about Indigenous tourism to be modelled and examined in the context of the attrition curve. To identify 'awareness' visitors were asked, without prompting, "what experiences are you aware of the can be undertaken in Australia?" These open ended responses were then coded into six experience options based on the International and National Visitor Surveys activity type options. A further question provided respondents with a list of 17 experiences and activities that can be undertaken in Australia, including five specific options for Indigenous tourism (see Appendix 1). For this question respondents were asked to rate, on a scale of 1 to 5, how important it is that they experience these activities while holidaying in Australia. These responses were recoded into the six experience categories and allowed for measurement of 'preferences'. Finally, using the same list of 17 experiences and activities, respondents were asked whether they had, or would be, participating in any of these experiences and activities while in Australia. Again these were recoded into the six experience categories which allowed for the measurement of 'intention/visit'.

Modelling was necessary to develop the attrition curve. The survey collected **unprompted** awareness, **prompted** preferences and **prompted** intentions/visit. The prompted preferences and intentions were scaled down by the unprompted awareness. This is based on the assumption that if the visitor was not aware of the experience, they cannot have a preference or intention to visit (i.e., preferences are a function of awareness and emotional associations). Awareness includes unaided recall from long-term memory and aided recognitions. Consumer responses to unaided awareness questions have been found to be associated strongly with positive attitudes, intentions to buy, and actual purchase (e.g., Axelrod 1968; Bronner & de Hoog 1974; Woodside & Carr 1988). Thus, to encourage a traveller's preference for a specific destination, an effective tourism marketing strategy is to gain a large share of first mentions among such travellers who are considering competing travel destinations. The shares of first mentions would be estimated by using responses to a question such as: "Of all the vacation-holiday destinations that would be available for you to visit in 1988, what destination first comes to your mind" (Woodside & Lyonski, 1989, p.9). The destination responses are henceforth referred to as the consideration set.

Figure 5.6. Attrition Curve: Respondents' Propensity to Undertake Key Australian Experiences

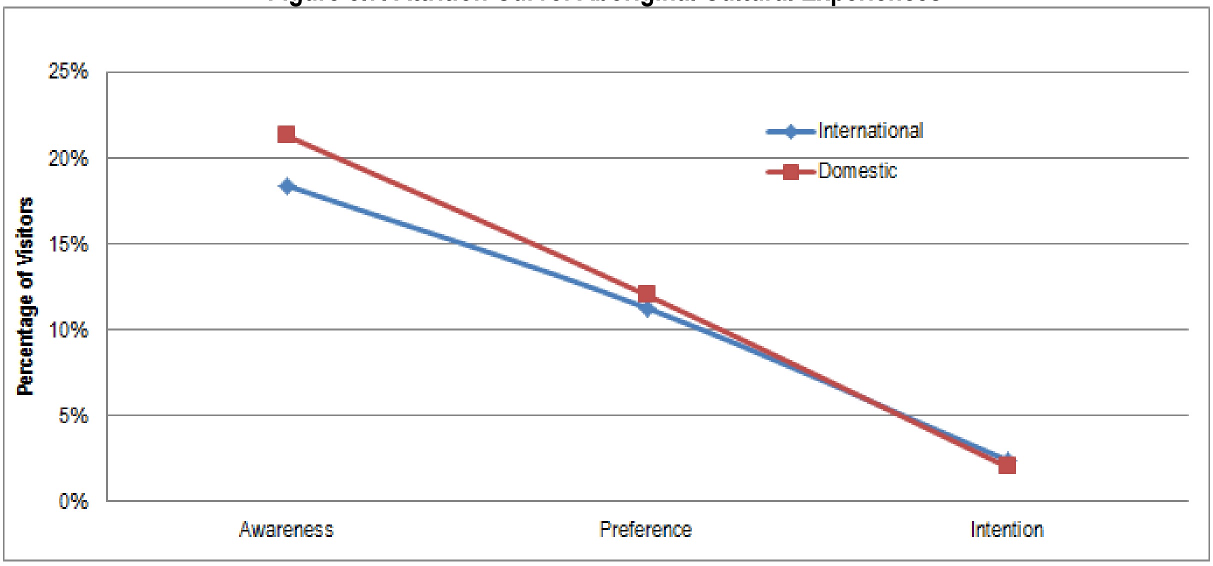


The 'Attrition Curve' generally revealed a decline from visitors' awareness through to intention and visit. Figure 5.6 shows that there is relatively high awareness of Australia's 'outdoor/nature experiences' amongst the visitor respondents. Additionally, there is also relatively high preference for this product, but lower actual intention to undertake the experience (which is demonstrated by the convex attrition curve). Another notable result was the 'social or other experiences' curve which is concave and flattens between preferences and intention. This suggested that the visitor respondents have a high intention of undertaking social experiences while on their trip.

The 'Aboriginal cultural experiences' curve is very flat. Indigenous experiences have the lowest awareness, preference and intention to undertake when compared with the other five key Australian experiences. Further, the 'Aboriginal cultural experiences' curve showed little difference between international and domestic respondents (Figure 5.7). Domestic respondents had slightly higher awareness levels of Indigenous tourism, citing this as a tourism option available in Australia only marginally more often than international visitors. The preferences and intention points were very close for both visitor groups, despite domestic visitors having higher awareness of Aboriginal cultural experiences.

The survey findings, as can be seen on the attrition curve in Figure 5.7, showed that 'top of mind' awareness of Indigenous tourism products and experiences is reasonably low – less than 25% for domestic respondents and less than 20% for international respondents. Although with prompting, preference and intention statistics were at 59% and 12% respectively. This has been the approach of previous studies of Indigenous demand and there are anecdotal assumptions that in previous research respondents have a tendency to give 'politically correct' responses, thus skewing actual visitor demand. To overcome this limitation of previous studies, this study has weighted the data with preference and intention statistics adjusted to account for those who were not aware of the product initially. With this approach, when preferences were explored, this dropped even further to below 12% with intention/visit declining to 2%[8]. These findings suggested that previous research, which has claimed high levels of interest by international tourists, and also claimed a significant proportion of the domestic market is open to Indigenous tourism experiences (Tourism Research Australia 2010), should be viewed with caution.

Figure 5.7. Attrition Curve: Aboriginal Cultural Experiences



For international visitors, the disconnect between stated interest and actual participation can be attributed to a lack of product promotion. Previous research showed that between 60% and 80% of international visitors who were either interested in experiencing, or had experienced an Indigenous tourism product believed they had been exposed to very little advertising (Buultjens & White 2008). Similarly, in this study a 'lack of awareness' of available products and experiences arose as a barrier for international tourists and operators most frequently cited a 'lack of promotion' as a barrier to visitors

[8] As preferences and intention to visit were prompted questions (meaning that the respondents were aware of the product when questioned), these were adjusted by the proportion of unprompted awareness. That is, if 19% of respondents stated they were aware of Indigenous experiences without being prompted and 12% of respondents stated that they intended to undertake an indigenous experience with prompting, the proportion of visitors who would actually undertake the experience, adjusting for those who do not think of the activity top of mind, would be around 2% of all visitors (aware and not aware). That is, 19%*12% = 2%.

participating in Indigenous tourism. For instance, in the last question of the survey which invited any further unprompted comments on Indigenous tourism in Australia, 53 respondents mentioned 'poor marketing/lack of promotion'. This was by far the most frequently mentioned 'other' (*"after being in Australia for a month I have never seen Aboriginal experiences promoted"*). In fact, many of the data collectors reported a number of the respondents asking where they could actually go to participate in the scenarios presented in the questionnaire. For example: *"travel agents in the US did not mention Aboriginal options to us otherwise we might have been very interested in some of these options"* and *"all activities [in the scenarios] sound great but don't know how to do them"*.

The domestic market findings were notable in that respondents did not have 'top of mind' awareness about Indigenous tourism. This is despite the assumption that Australians should arguably have, to varying degrees, knowledge about, or at the very least, awareness of, opportunities to experience activities pertaining to Australian Indigenous peoples. Concomitantly, a number of the operators raised the issue of what could be termed 'backyard syndrome', that is, a perceived 'familiarity' with Indigenous experiences (i.e., culture, customs, traditions) that would lead them to not seek an Indigenous cultural experience per se. As operators noted, *"they live in Australia, and there's an Aboriginal in every town they live in probably so they think they already know"*, and *"I think maybe sometimes when it's in your backyard you don't appreciate it so much"*. Furthermore, one domestic tourism respondent noted: *"I'm from Darwin so Indigenous stuff is everywhere so never bothered to hunt it down"*. Operators also discussed racism, negative preconceptions and negative media and publicity as factors that could impact on awareness.

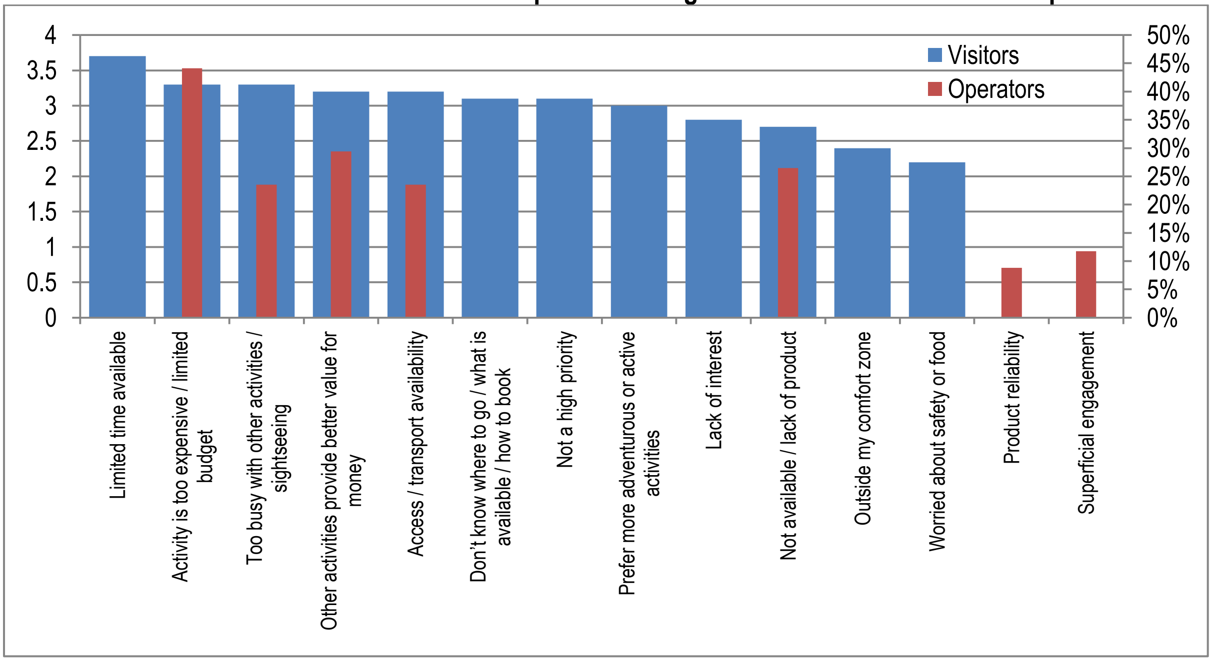
While familiarity, attitudes and/or negative media may be contributing factors as to why domestic tourists do not participate in Indigenous tourism activities or experiences, a further challenge is that this market is largely unaware that there is an option to do so. Therefore strategies to grow the domestic market for Indigenous tourism should focus on increasing awareness amongst the domestic market.

5.3 Participation in Indigenous Tourism: Mapping the Barriers

The preferences of visitors and their intention to participate in, and/or visit Indigenous tourism experiences dropped sharply on the attrition curve (Figure 5.5). To explore the barriers that prevented tourists from undertaking an Indigenous experience in Australia, international and domestic visitors who indicated that they would not be participating in Indigenous tourism were asked to rate certain barriers on a scale of 1 to 5 (with '1' being not at all and '5' being to a very great extent[9]).

International tourists ranked 'limited time available' as the main barrier to participating, with 'budget', 'other activities' and 'access' also ranking above the mid point on the scale (Figure 5.8). Other items on the scale were rated below the neutral response and so were not seen as barriers to participating by the majority of respondents. The operators were not given prompts but still identified several of the same barriers as tourists; additionally citing perceived barriers related to product reliability and demand for superficial engagement in Indigenous experiences.

Figure 5.8. Barriers to International Tourists Participation in Indigenous Tourism: Visitors and Operators

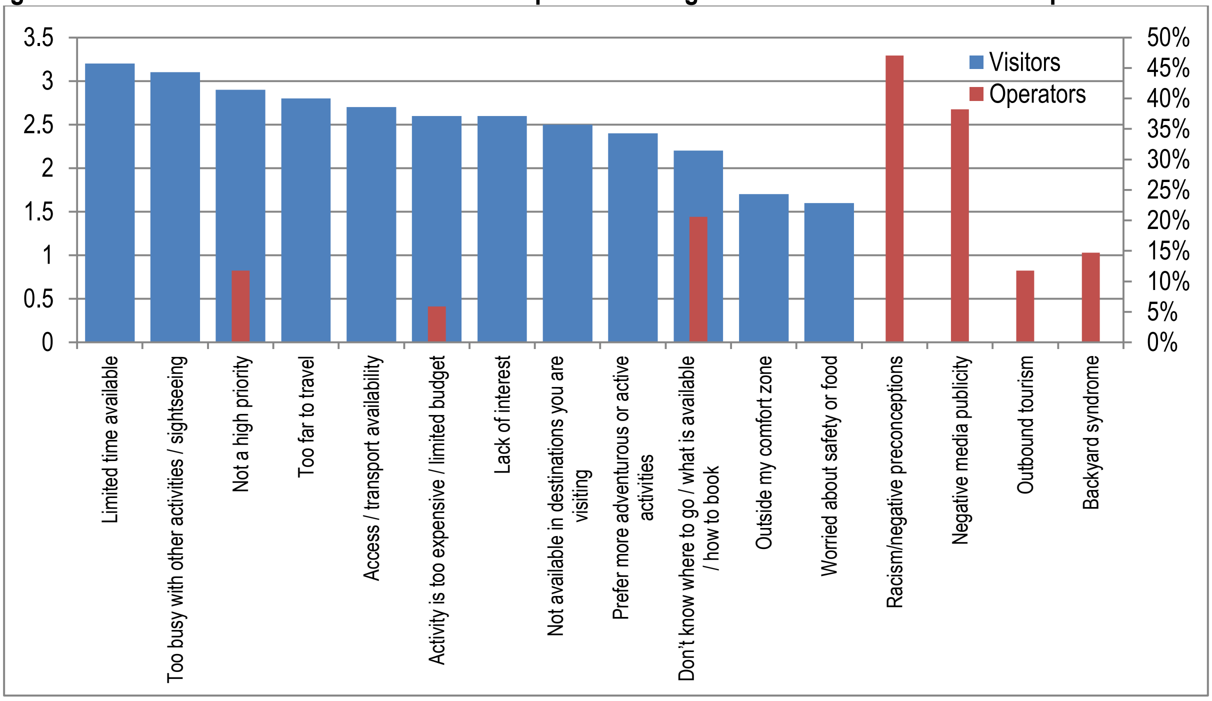


Similarly with domestic tourists, there were few barriers that rated above the mid-point of the scale (Figure 5.9). Only 'limited time available' and 'engaged in other activities/sightseeing' rated above the neutral point. The operators for the most part, identified additional barriers to those posed to visitors. Almost 50% of operator respondents perceived racism and negative preconceptions about Indigenous people to be barriers to visitor participation in Indigenous tourism. Moreover, more than one third of respondents discussed negative media publicity pertaining to Indigenous peoples and communities. For

[9] Each of the barriers received at least a ranking of 1 which means that items below three are not seen at all, or to a great extent, as barriers to participation. Barriers to participation were also discussed with operators and these were coded to enable mapping against the tourist responses. Operator responses were open-ended and once analysed by theme, were coded to generate frequencies (Figure 5.6).

instance, one operator participant noted, *"the way the media depicts Aboriginals. We only ever…hear about the negative side".*

Figure 5.9. Barriers to Domestic Tourists Participation in Indigenous Tourism: Visitors and Operators



Within the visitor survey there was an option for respondents to list any other factors that they considered to be barriers. Respondents indicated 'other' barriers as:

- the experience was not deemed authentic (n=62),
- they had previously participated in an Indigenous activity and did not see a need to do so again (n=12).

While a low sample, several responses also related to previous negative interactions with Indigenous individuals and/or communities; and having close contact with Indigenous peoples and/or communities via friendships, employment or living in Indigenous communities. Some respondents had participated in an Indigenous experience in another country and did not wish to do so again in Australia.

Given the relatively low levels of preference and intention/visit discussed previously with regards to the attrition curve, the extent to which these results (i.e., the neutrality of most of the barriers in Figure 5.9) truly reflect the barriers to participating in Indigenous tourism should be questioned. For instance, respondents may have been hesitant to articulate broader barriers pertaining to otherwise culturally sensitivity issues relating to Indigenous peoples and/or communities. In essence, respondents may have felt the need to adhere to political correctness, which may have unduly influenced the results in relation to barriers to participating in Indigenous tourism.

5.4 Indigenous Tourism Scenarios: Motivations, Appeal and Willingness to Pay

Respondents were posed eight potential Indigenous tourism product experience scenarios. Within each of the eight scenarios, there were a series of questions designed to elicit the appeal of that particular attraction/experience/activity, intentions to participate, willingness to pay, and/or any barriers to participating. The scenarios were hypothetical and designed to represent a range of options from tours, accommodation or static displays, to varying lengths of time to participate, to activities and experiences in urban and remote locations. The eight scenarios included:

- Two hour walking tour with an Aboriginal Guide
- Stay overnight in a remote Aboriginal Community/on Aboriginal
- Experience an Aboriginal cultural show or performance
- Stay overnight in a luxury cabin on Aboriginal land
- Experience and aboriginal museum display
- Full day tour with an Aboriginal guide
- Half day adventure activity with an Aboriginal guide
- Visit remote Aboriginal rock paintings or carvings.

Each of the scenarios and associated questions has been presented in detail in Chapter Three. This part of the research was not designed to map against operator participants and so here, a cumulative discussion of the scenario results is provided.

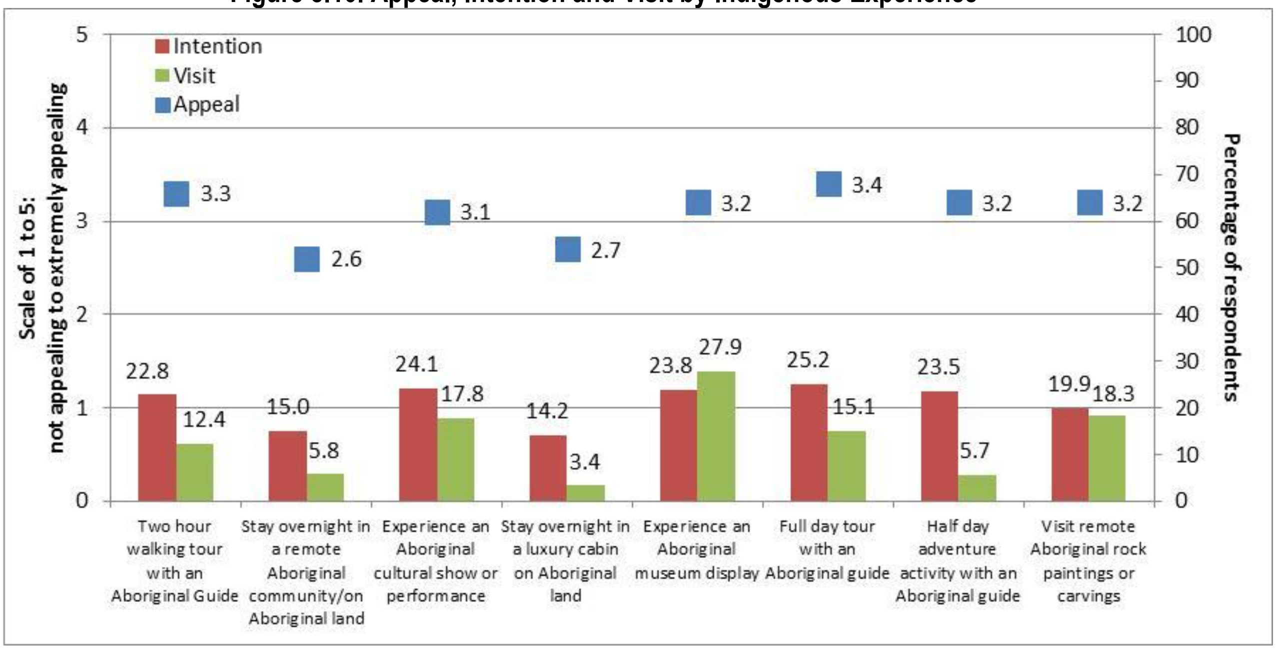
Activities such as 'full day tour with an Aboriginal guide' to key Australian attractions, as well as a 'two hour walking tour with an Aboriginal guide' within driving distance of a major capital city had the highest appeal ratings on a five point scale. However, as can be seen in Table 5.1, the appeal ratings for these and other scenario options sit around the mid-point of the scale, thus suggesting that these activities had a reasonably neutral appeal across the sample. In terms of intentions, between 14.2% and 25.2% of respondents had an intention to undertake one of the Indigenous experiences presented to them. However, in terms of actual visitation, between 3.4% and 27.9% of visitors had actually undertaken the activity previously. Generally, more respondents intended to undertake an Indigenous experience than those who actually had undertaken the experience, with the exception of 'experiencing an Aboriginal museum display' (Table 5.1). It is necessary to keep in mind the limitations of previous studies where 'intention' is often overestimated by respondents.

Table 5.1. Overall Appeal of Indigenous Tourism Experience and Activity Scenarios

Experience	Appeal	Prompted Intention (% respondents)	Prompted visit (% respondents)	Willingness to pay (Median $)
Two hour walking tour with an Aboriginal Guide – within driving distance of a capital city	3.3	22.8	12.4	$1-$50
Stay overnight in a remote Aboriginal community/on Aboriginal land – shared facilities	2.6	15.0	5.8	$51-$100
Experience an Aboriginal cultural show or performance – part of a larger tourist attraction	3.1	24.1	17.8	$1-$50
Stay overnight in a luxury cabin on Aboriginal land – remote, private facilities	2.7	14.2	3.4	$101-$200
Experience an Aboriginal museum display*	3.2	23.8	27.9	$1-$50
Full day tour with an Aboriginal guide – iconic attractions, regional location	3.4	25.2	15.1	$101-200
Half day adventure activity with an Aboriginal guide	3.2	23.5	5.7	$51-100
Visit remote Aboriginal rock paintings or carvings	3.2	19.9	18.3	$1-$50

*The data for this scenario suggested that respondents have participated in this activity previously and are less inclined to do it again. For domestic and international splits see results chapter 3

Figure 5.10. Appeal, Intention and Visit by Indigenous Experience



The most cited motivation for undertaking at least one of the Indigenous scenario experiences was an interest in Aboriginal history, culture and traditions. Conversely, the most cited barrier to undertaking the scenarios was a lack of interest in the scenarios presented. Of the 1255 respondents who answered the scenario questions, 706 (or 56%) stated that they were motivated to undertake at least one of the scenarios due to an interest in Indigenous culture (see Figure 5.10), while 697 (or 56%) stated that the barrier to them undertaking at least one of the scenarios was a lack of interest in the scenarios presented (see Figure 5.11). Thus, not surprisingly, the determining factor that motivated and/or prevented respondents from undertaking an Indigenous experience was their level of interest in the offering.

Figure 5.11. Motivations to Participate in Indigenous Tourism: Aggregated Scenario Responses

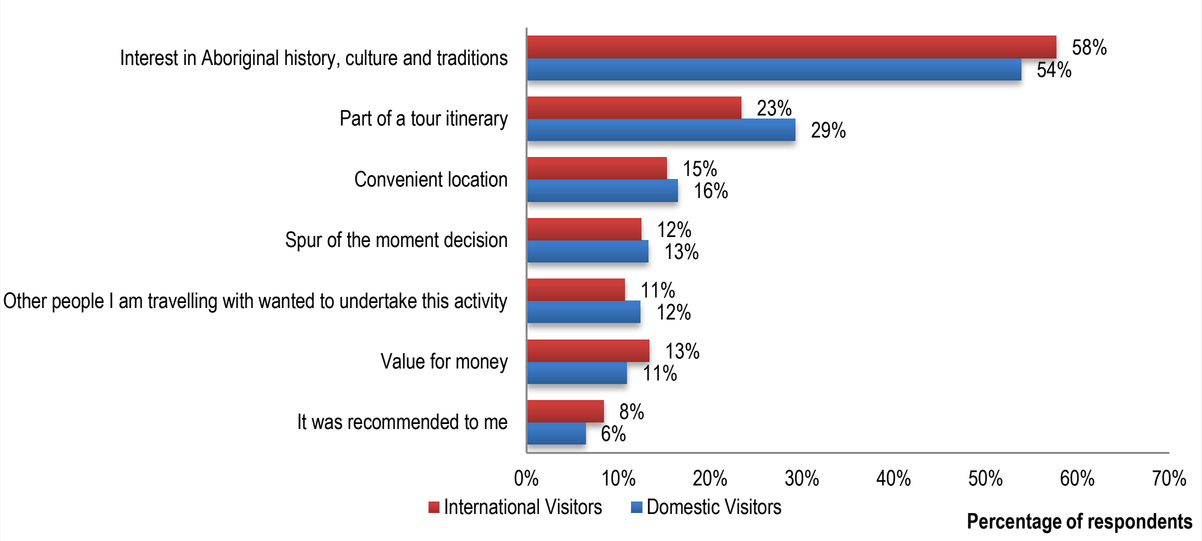
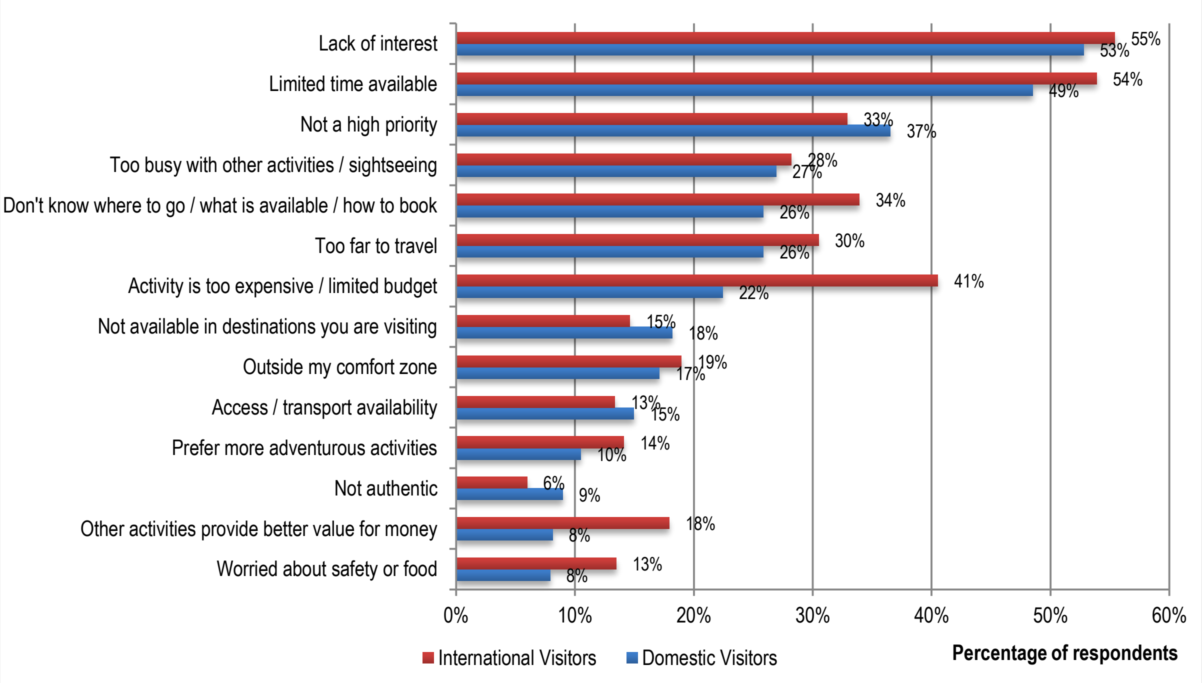


Figure 5.12. Barriers to Tourists Participation in Indigenous Tourism: Aggregated Scenario Responses



5.5 Authenticity and Indigenous Tourism

The issue of authenticity was touched on in this study but there is much scope to investigate the myriad of issues around Indigenous tourism and authenticity in more detail in future research. For instance, some authors have claimed that tourists, to varying degrees, want to experience Indigenous cultures, thus almost all Indigenous peoples and their communities have been impacted by the diffusion of contemporary mass tourism to some extent (Weaver 2010). On the one hand, increased tourist attendance at Indigenous cultural festivals for example, can present an opportunity for facilitating peace and the transfer of knowledge and understanding among different societies and cultures (Brunt & Courtney 1999). On the other hand, conventional forms of unsustainable tourism cannot successfully coexist with Indigenous cultures as tourists ultimately destroy the culture they seek to experience (Lietaer & DeMeulenaere 2003). In an address at the 2008 Telstra Art Awards, Bunduk Marika, a Yolngu (Indigenous Australian community of the Northern Territory) women and artist stated “before colonisation Yolngu never had to justify their existence. Since then it is what we do on a daily basis” (see Slater 2011, p. 631). With a continuous daily fight to maintain and retain their way of life and environment, Indigenous communities struggle with the external globalising forces of Western civilization and economies. Such struggles which conspire against Indigenous cultural sustainability included land and resource disputes, cultural freedom, health, employment, and racism and social and economic exclusion (Phipps & Slater 2010). In an attempt to take advantage of the benefits of tourism, communities not only face the pressures of commercialisation and inauthentic representation of their culture, but also the struggles in trying to meaningfully connect and communicate cross-culturally with tourists. Although tourism can foster cross-cultural communication and understanding (Sdnali & Chazapi 2007), Haydon (2007) claimed that language barriers and face-to-face interactions between tourists and Indigenous peoples can create negative impacts for Indigenous communities including the destruction of local traditions and cultures and the erosion of the story telling experience bought about by unsustainable mass tourism.

Globally, debate around authenticity in an Indigenous tourism context is ongoing and complex. From a supply side perspective, operators are challenged to provide a product that does not compromise cultural integrity yet concomitantly, is commercially viable by responding to the demands, expectations and logistics of the visitor market; arguably a visitor market which has markedly different segments. For instance, some visitor groups demand short, sharp, superficial and stereotypical presentations of Indigenous culture to ‘tick the box’ on an Australian Indigenous tourism experience. Other visitor segments seek deeper, more meaningful engagement with Indigenous peoples, culture and nature. It is likely to be this visitor segment who, identified (in the visitor survey) ‘not authentic’ ‘as an unprompted reason for not participating (n=62) in Indigenous tourism: *“in Australia it's more 'put-on' and touristy”*. Similarly, a number of respondents (n=15) identified ‘too commercial’ as a reason why some Indigenous tourism scenarios (in the visitor survey) did not/would not appeal. The challenge for Indigenous tourism operators then, is undoubtedly finding the common ground between the two groups, and/or, making a conscious decision to position the product to a particular target market.

For the operators involved in this study, authenticity meant a personal experience or engagement with an Indigenous person. They regarded this as important for both the international and domestic market. Similarly, Tourism Research Australia (2010) proposed Indigenous people should be employed to deliver the Indigenous tourism experience in order to increase visitors’ perception that the experience is authentic. While most operators concurred, they noted a problem arose from challenges associated with the employment of Indigenous guides, largely due to a lack of employee capacity (i.e., suitably qualified) and commitment.

Indigenous ownership, control and participation in the presentation of Indigenous tourism constitute a complex issue and one that also impacts on discussions of authenticity. Tourism ventures may, and indeed have been created around Indigenous culture and themes. However, the respective Indigenous peoples and communities connected to such ventures, have varying degrees of control over the presentation and representation of their culture and traditions. Globally, many Indigenous tourism ventures have been controversial and continue to create heated debate about cultural expropriation, Indigenous intellectual property rights and copyright infringement. Moreover, commercialisation of the Indigenous tourism ‘product’ significantly contribute to increasing criticism that Indigenous products are inauthentic and/or highly commodified (Butler & Hinch, 2007).

Indigenous tourism operator participants in this research were mixed in their responses to issues about product authenticity. Most thought that it was important in principle, but few claimed authentic product was actually important to the visitors. Several noted that from a visitor perspective, what would be more important was whether the guide was Indigenous. Some visitor respondents (n=10), were invited to make further comments about Indigenous tourism in Australia and discussed issues of ownership and authenticity: *“would want to make sure that community themselves are benefitting from tourism and that it is not too commercialized and sometimes it is hard to evaluate whether it is authentic”*.

The issue of contemporary authenticity also emerged at several points in the operator interviews. For instance, some participants felt that an authentic experience was *“meeting the people as they’re living* *their lives today".* This contrasted with what many operators felt was a desire by visitors for a stereotypical or 'traditional' portrayal of Indigenous culture. Certainly, both in Australia and overseas it is acknowledged that marketing is a big contributor in reinforcing stereotypes of Indigenous culture where images of Indigenous peoples are used to embellish the cultural attractiveness of the country as a tourism destination (Pomering, 2011; Whitford & Ruhanen, 2009). The interview respondents discussed this issue at length, with many expressing dissatisfaction with the expectation of visitors that Aboriginals will be *"sitting with a lap-lap on and a painted…face"*.

The results of this study clearly demonstrated the notion of authenticity is neither absolute nor all-encompassing but rather socially constructed, interpreted and relative, depending on changes in the context and of individual perceptions (Yang & Wall 2009). As such, there are not one but many perceptions of this highly complex and contested concept, which is exacerbated by its extreme heterogeneity and diversity of usage (Belhassen & Caton 2006). The results also revealed that tourism has the capacity to induce cultural change and commercialisation which can ultimately diminish the importance of meanings and destroy the authenticity of culture (Taylor 2001).

The issue at hand then, centres on how Indigenous tourism experiences can be deemed authentic if they are commodified and packaged for tourism (Hillman 2007), and when they are performed outside their true traditional context (Fredline 2000). For those operators who do not want tourism impinging upon and giving cause to alter their culture and traditions, consideration can be given to implementing 'staged authenticity' where the host constructs artificial sites to keep the inquisitive tourist at bay (Urry 1995). That is, the host community can protect their culture by creating front-regions (i.e., limited activities for tourists as staged authenticity), and back-regions (i.e., sacred traditional ceremonies away from tourists' gazes). Concomitantly, Ryan and Huyton (2002) suggested adopting the term authorisation over authenticity as this redirects the attention to authority instead of defining a concept that constantly changes. While there is no clear solution to reaching consensus on what constitutes authenticity, arguably there will be consensus that "authenticity still matters" (Pearce 2007, p. 86).

Stage Two:
The Chinese Inbound Market and Indigenous Tourism

Chapter Six: Results – Chinese Visitor Surveys

Two separate data sets were collected from inbound Chinese visitors for Stage Two of the study. The first was the visitor survey that was undertaken for Stage One of the research in Sydney, Melbourne, Darwin and Cairns (referred to from here as *Chinese visitor survey*). Of the 861 international visitors surveyed, 115 were Chinese respondents. The second inbound data set was a survey undertaken with 275 Chinese tourists travelling on group tours (referred to from here as *Chinese tour group*). Where data is available, results for both data sets are presented together. However, the Chinese tour group survey was self-administered and due to various limitations associated with surveying in this way, it was considerably shorter and consisted of fewer questions and/or question configurations that were different to the 'main' Chinese visitor survey.

6.1 Demographics and Trip Profile:

A total of 861 international visitors were surveyed in the main visitor survey. Of these, 115 were Chinese respondents. The gender distribution of the Chinese visitor survey respondents was slightly skewed towards females (56%). Approximately half (51%) of the respondents were aged 15 to 29 years, with the remainder being 30 years or over. The majority of the Chinese respondents were in Australia for a holiday (62%), followed by other purposes such as education and business.

The gender distribution of the 275 Chinese tour group respondents was 59% male and 41% female and just over half of the respondents were aged between 25-49 years. The average length of stay in Australia for Chinese visitors in a tour group was 8.3 nights.

6.2 Product Awareness and Preferences

6.2.1 Awareness of Australian activities and experiences

Chinese visitor survey respondents were asked, without prompting from the interviewers, what activities and experiences they were aware of that could be undertaken in Australia. This question was aiming for spontaneous responses that would elicit respondents' 'top of mind' awareness of the types of activities, experiences or attractions available in Australia (Table 6.1).

Similarly the Chinese tour group survey also asked respondents to indicate which of the following list of experiences they were aware of that could be undertaken in Australia. As this was a self-administered questionnaire, the respondents could see the experience options and so this was not a ‘top of mind’ response as was the case in the Chinese visitor survey (Table 6.1).

Table 6.1. Awareness of Australian Activities and Experiences

Experiences	**Chinese Visitor Survey Respondents**		**Chinese Tour Group Respondents**	
	Frequency	%		
Outdoor / nature experiences	78	71%	209	83%
Local attractions / tourist experiences	56	51%	143	52%
Active outdoor / sport experiences	18	16%	109	39%
Social or other experiences	25	23%	98	35%
Arts / heritage experiences	17	15%	60	22%
Aboriginal cultural experiences	16	15%	33	12%
Total respondents	110		275	

6.2.2 Preferences, intention and visit

Respondents in the Chinese visitor survey were posed a hypothetical open-ended question that asked what would be the ‘top’ five things that they would like to see or do in Australia under a hypothetical scenario based on the respondent having unlimited time and money to participate in these activities or experiences. The ‘top’ attraction/experiences on the Chinese visitors ‘wish list’ was general sightseeing/travelling around (68%) (compared to 29% of total international visitors – see Chapter Three). The next most popular activity for Chinese tourists was the Great Barrier Reef (50%) (Table 6.2). Only 6% of Chinese respondents cited Indigenous tourism as a top of mind response to this question.

This question was not included in the Chinese tour group survey.

Table 6.2. Top Experiences – Chinese Visitor Survey and All International Visitor Survey Respondents

	Chinese Visitor Survey Respondents		Total International Visitor Survey Respondents	
Rank	Desired experience	% Chinese visitor respondents	Desired experience	% Total international visitor respondents
1	Sightseeing/travelling around	68%	Sightseeing/travelling around	50%
2	Great Barrier Reef	29%	Great Barrier Reef	24%
3	Business	27%	Adventure	21%
4	Wildlife	27%	Uluru	16%
5	Shopping	26%	Diving	13%
6	Beach	19%	Sydney	13%
7	Migration	19%	Shopping	12%
8	Adventure	16%	Islands	11%
9	Education	16%	Wildlife	11%
10	Clubs/gaming	13%	Gourmet	9%
11	Cultural	13%	Boating	8%
12	Tasmania	13%	Tasmania	8%
13	Gourmet	12%	Active outdoor	8%
14	National Park	12%	Outback	8%
15	Active Outdoor	10%	Harbour Bridge	7%
16	Boating	10%	Melbourne	7%
17	Diving	10%	Migration	7%
18	Relaxation	10%	Opera house	7%
19	Gold Coast	9%	Cultural	7%
20	Sydney	9%	Business	6%
21	Harbour Bridge	8%	Education	6%
22	Melbourne	8%	Gold Coast	6%
23	Opera House	8%	Clubs/gaming	5%
24	Outback	8%	Beach	4%
25	Social	8%	Nature based activities	4%
26	Indigenous	6%	Sport	4%
27			Social	4%
28			Cairns	4%
29			Perth	4%
30			Events	3%
31			National park	3%
32			Relaxation	3%
33			Alice Springs	3%
34			Luxury	3%
41			Kakadu	2%
42			Western Australia	2%
43			Indigenous	2%

*Developed from open ended question asking respondents their top five Australian experiences – Chinese visitors n= 115, total international visitors n=1269

Chinese visitor survey respondents were then asked to consider a predetermined list of activities and experiences that could be undertaken while visiting Australia. The list was a randomised and abridged version of the standardised visitor activities list that has been developed to code activity responses in the international and national visitor surveys. Here, respondents were asked to rate on a scale of 1 to 5 (where '1' is not at all important and '5' is extremely important), how important it was to undertake certain experiences while in Australia. The respondents were also asked to state whether they had, or planned to, undertake any of the experiences while on this trip.

Chinese visitor survey respondents were not aware at this point that the survey was focused on Indigenous tourism, although five of the experience options in the list related to Indigenous tourism. 'Visit an Aboriginal cultural centre/gallery', 'see an Aboriginal performance', 'go on a tour with an Aboriginal guide', and 'visit and Aboriginal site or community' ranked around the midpoint of the scale with means of 3.0 and 2.8 for Chinese visitors. Somewhat further down the importance scale was to 'stay with an Aboriginal host'. For Chinese visitors, all Indigenous activities were ranked lower than the average international visitor (Table 6.3).

Chinese visitor survey respondents were significantly less likely than other international respondents to consider it important to: go on a tour with an Aboriginal Guide ($p=0.003$); and, visit an Aboriginal site or community ($p=0.005$). There were no significant differences between the Chinese visitor survey respondents and other international respondents for the other Indigenous experiences.

In contrast, Chinese visitor survey respondents were more likely than other international visitors to want to attend amusement/theme parks ($p = 0.004$) and to go shopping ($p<0.001$) (Table 6.3). They were significantly less likely than other international visitors to want to attend national parks/state parks/world heritage sites/botanical gardens ($p<0.001$), sports/adventure activities ($p<0.001$), pubs, clubs, discos, casinos and restaurants ($p<0.001$) and sightseeing/looking around ($p=0.004$).

Chinese tour group respondents were also asked to rate on a scale of 1 to 5 (where '1' is not at all important and '5' is extremely important), how important it was to undertake certain experiences while in Australia. Table 6.3 shows 'visit and Aboriginal site or community' (3.3), 'going on a tour with an Aboriginal guide' (3.2), 'visit and Aboriginal cultural centre/gallery' (3.2), and 'see an Aboriginal performance' (3.2) ranked above the midpoint of the scale. Slightly further down the importance scale was to 'stay with an Aboriginal host' (3.0).

Table 6.3. Perceived Importance (preference) and Intentions to Participate in Activities and Experiences

Experience	Chinese Visitor Survey Respondents		Chinese Tour Group Survey Respondents
	Mean	% undertaking activity	Mean
Sightseeing / looking around	4.1	70%	3.8
National parks / state parks / world heritage sites / botanical gardens	3.8	47%	3.9
Wildlife parks / zoos / aquariums	3.8	43%	3.7
Museums, art galleries, history / heritage buildings, sites or monuments	3.6	51%	3.7
Shopping	3.4	69%	3.2
Events, festivals, fairs and markets	3.4	44%	3.2
Visit the outback	3.2	10%	3.2
Sports / Adventure activities	3.0	17%	2.9
Attend theatre, concerts or performing arts	3.0	28%	3.0
Visit an Aboriginal cultural centre / gallery	3.0	13%	3.2
See an Aboriginal performance	3.0	14%	3.2
Go on a tour with an Aboriginal Guide	2.9	14%	3.2
Visit an Aboriginal site or community	2.8	8%	3.3
Amusement / theme parks	2.7	35%	2.4
Pubs, clubs, discos, casinos and restaurants	2.6	36%	2.5
Stay with an Aboriginal host	2.5	4%	3.0
Health spa or wellbeing centre	2.4	7%	2.9

Note: Chinese tour group respondents were only asked to rank the importance of the experience and not whether they were undertaking the experience as was the case for the Chinese visitor survey respondents.

6.2.3 Respondents not participating in an Indigenous experience

In the Chinese visitor survey, respondents who indicated that they were not going to undertake one of the five Indigenous experiences in the preferences and intentions questions (n = 80) (Table 6.4) were directed to a series of additional questions.

Table 6.4. Intention to Participate in an Indigenous Experience

Undertaking an Indigenous activity?	Chinese Respondents		International Respondents	
	Frequency	Percent (%)	Frequency	Percent (%)
Yes*	27	25.2	275	33.7
No	80	74.8	540	66.3
Total	107	100.0	815	100.0

*Based on whether respondents selected one of the five Indigenous activities in the intention to undertake activities question

Of those Chinese visitor survey respondents who indicated that they were not undertaking an Australian Indigenous experience on this trip, 13% stated that they had previously participated in an Australian Indigenous experience (Table 6.5). There was no significant difference between Chinese and other international respondents in regard to whether they had previously undertaken an Indigenous experience in Australia.

Table 6.5. Previously Participated in an Indigenous Experience

	Chinese Respondents		International Respondents	
	Frequency	**Percent (%)**	**Frequency**	**Percent (%)**
Participated	10	12.5	90	17.2
Not participated	70	87.5	431	80.9
Don't Know	n.p.	n.p.	10	1.9
Total	80	100.0	531	100.0

*Percentages may not sum due to rounding n.p. = Not Publishable

The Chinese visitor survey respondents were then asked if they were likely to undertake an Australian Indigenous experience some time in the future. Generally, Chinese respondents stated that they would one day, but not in the next five years (38%) or they never would undertake an Indigenous experience in Australia (20%). There was no significant difference between Chinese and other international visitors in response to this question.

The Chinese visitor survey respondents who had indicated that they were not participating in an Indigenous experience on this trip were also asked to rate, on a scale of 1 to 5 (with ‘1’ being not at all and ‘5’ being to a very great extent) to what extent a series of potential barriers were preventing them from undertaking an Indigenous experience in Australia. Results showed that ‘limited time available’, a ‘lack of interests’ and ‘too busy with other activities/sightseeing’ and ‘activity is too expensive/limited budget’ were the four main barriers (Table 6.6).

Compared with the other international visitor respondents, Chinese visitors were found to be significantly more likely to cite ‘access/transport availability’ ($p=0.045$), too far to travel ($p=0.006$), too busy with other activities/sightseeing ($p=0.006$), lack of interest ($p<0.001$), limited time available ($p<0.001$), outside my comfort zone ($p<0.001$), don’t know where to go/what is available/how to book ($p=0.005$) and not available in destinations you are visiting ($p=0.037$) as barriers to participating in Indigenous experiences.

Chinese tour group respondents were also asked whether, on future visits to Australia, any of the predetermined list of barriers would prevent them from participating in an Indigenous experience. For all respondents in this sample, a perceived lack of time available (35%), the activity is too expensive/they have a limited budget (33%) and/or it was too far to travel to Indigenous tourism experiences (26%)

were considered to be barriers to their participation in Indigenous tourism on future visits to Australia (Table 6.6).

Table 6.6 Barriers to Participating in Indigenous Tourism for Chinese Visitors

	Chinese visitor survey respondents			Chinese tour group respondents	
Barriers	**Freq.**	**Mean**	**Std. Dev.**	**Freq.**	**Percent**
Limited time available	63	4.2	1.1	96	35%
Lack of interest	62	3.5	1.5	22	8%
Too busy with other activities / sightseeing	60	3.8	1.3	34	12%
Activity is too expensive / limited budget	60	3.6	1.4	90	33%
Don't know where to go / what is available / how to book	59	3.6	1.4	37	14%
Too far to travel	58	3.6	1.2	71	26%
Access / transport availability	58	3.5	1.3	58	21%
Outside my comfort zone	57	3.2	1.4	36	13%
Other activities provide better value for money	55	3.3	1.2	27	10%
Worried about safety or food	55	2.4	1.3	21	8%
Prefer more adventurous/active activities	54	3.0	1.3	28	10%
Not available in destinations you are visiting	53	3.0	1.3	20	7%
Not a high priority	53	3.2	1.2	35	13%

*5 point scale from 1 “Not at all” to 5 “To a very great extent”

6.3 Indigenous Tourism Activity and Experience Scenarios

As with the international visitor survey respondents generally (see Chapter Three), Chinese visitor survey respondents were provided with eight different Indigenous tourism activity and experience scenarios containing a series of questions to elicit the appeal, intentions, willingness to pay, and any barriers to participating. The scenarios were hypothetical and designed to represent a range of options from tours, accommodation or static displays, to varying lengths of time to participate, to activities and experiences in urban and remote locations. The eight scenarios are included below. Due to the time constraints of the survey, the interviewers utilised abridged versions of the full scenario for subsequent questions and these are included in brackets. Moreover, due to the restricted sample size for the Chinese visitor segment, only limited detail can be provided for each of the experience scenarios.

Chinese tour group respondents were also asked to rate the appeal of the scenarios on a scale of 1 to 5 (with 1 not at all appealing and 5 very appealing). For the Chinese tour group respondents, all of the experiences received mean rankings of between 3.0 and 3.6 on a 5 point scale indicating that the activities were considered somewhat appealing by the survey respondents (Table 6.7).

Table 6.7. Appeal of Indigenous Tourism Experience and Activity Scenarios – Chinese Tour Group Respondents

	Chinese visitor survey respondents		Chinese tour group respondents	
Experience	**Mean**	**Std. Dev.**	**Mean**	**Std. Dev.**
Half day adventure activity (4WD, Mud crabbing, fishing or kayaking)	3.01	1.442	3.65	1.275
Full day tour with an Aboriginal guide	3.34	1.286	3.58	1.184
Stay overnight in a luxury cabin on Aboriginal land.	2.25	1.334	3.46	1.240
Experience an Aboriginal cultural show or performance	3.17	1.182	3.44	1.073
Experience an Aboriginal museum display	3.01	1.288	3.22	1.104
Two hour walking tour with an Aboriginal guide.	3.00	1.241	3.22	1.149
Visiting a remote outback location to see Aboriginal rock paintings or carvings	2.78	1.271	3.21	1.197
Stay overnight in a remote Aboriginal community or on Aboriginal land.	2.25	1.334	3.09	1.248

The following section presents the findings of the Chinese visitor survey respondents. Further analysis could not be performed on the Chinese tour group survey data.

6.3.1 Scenario 1: Walking Tour with an Aboriginal Guide

The appeal of a 'two hour walking tour with an Aboriginal guide to learn about bush tucker, history, heritage and culture, and is within driving distance of a major capital city' was considered by 42% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.0. Chinese respondents ($\bar{x}$ = 3.0) were significantly less likely (p=0.001) than other international visitors ($\bar{x}$ = 3.4) to find this experience appealing.

Key findings relating to Scenario 1 included:

- 62% of Chinese visitor survey respondents stated that they did not intend to/did not know if they would undertake the experience.
- For the 38% of respondents who had/or intend to participate in the experience, the primary motivator was an interest in Aboriginal history, culture and traditions (n=29, 78%).
- The main barriers to undertaking this experience were lack of interest (n=32, 33%), limited time available (n=22, 23%) and too far to travel (n=20, 21%).

6.3.2 Scenario 2: Budget Stay in a Remote Aboriginal Community

The appeal of 'staying overnight in a remote Aboriginal Community or on Aboriginal Land in budget or midrange accommodation with shared facilities was considered by only 20% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 2.3.

Chinese respondents ($\bar{x}$ = 2.3) were significantly less likely ($p<0.001$) than other international visitors ($\bar{x}$ = 2.7) to find this experience appealing.

Key findings relating to Scenario 2 included:

- 77% of Chinese visitor survey respondents did not intend to or did not know if they would undertake this experience.
- The primary barriers to undertaking this experience were lack of interest (n=28, 42%), limited time available (n=20, 30%) and too far to travel (n=20, 30%).

6.3.3 Scenario 3: Aboriginal Cultural Show or Performance

The appeal of 'attending an Aboriginal cultural show or performance as one part of a larger tourist attraction' was considered by 48% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.2. There was no significant difference between Chinese respondents and other international respondents in terms of how appealing they found this experience.

Key findings relating to Scenario 3 included:

- 62% of Chinese visitor survey respondents stated that they have or intended to undertake this experience. An interest in Aboriginal history, culture and traditions was the main motivator for participating in this experience (n=33, 59%).
- The highest proportion of respondents (46%) stated that they would be willing to pay between $51 and $200 for the experience, with a further 38% stating they would pay between $1 and $50.

6.3.4 Scenario 4: Luxury Overnight Stay on Aboriginal land

The appeal of 'staying overnight in a luxury cabin on Aboriginal land on a remote beach with private facilities' was considered by 42% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.0. Chinese respondents ($\bar{x}$ = 3.0) were significantly more likely ($p=0.034$) than other international visitors ($\bar{x}$ = 2.7) to find this experience appealing.

Key findings relating to Scenario 4 included:

- 29% of Chinese visitor survey respondents stated that they have or intended to undertake this experience, with 71% stating that they did not intend to or did not know if they would undertake the experience.
- The primary barriers to undertaking this experience were that the activity is too expensive or they had a limited budget (n=27, 42%) and limited time available (n=22, 34%).

6.3.5 Scenario 5: Aboriginal Museum Display

The appeal of 'viewing a museum display of Aboriginal history, photos, art, artefacts and crafts, which is one part of a larger museum' was considered by 47% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.0. There was no significant difference between Chinese respondents and other international respondents in terms of how appealing they found this experience.

Key findings relating to Scenario 5 included:

- Approximately half (51%) of Chinese visitor survey respondents stated that they have or intended to undertake this experience and would be willing to pay between $1 and $50 for the experience.
- An interest in Aboriginal history, culture and traditions was the primary motivator (n=27, 59% of respondents with intention to undertake) while a lack of interest was the primary barrier identified (n=25, 56%).

6.3.6 Scenario 6: Day Tour with Aboriginal guide

The appeal of 'going on a full day tour in a vehicle with an Aboriginal Guide to an iconic landscape and attraction, and whilst on the tour you will learn about Aboriginal history, heritage and culture' was considered by 58% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.3. There was no significant difference between Chinese respondents and other international respondents in terms of how appealing they found this experience.

Key findings relating to Scenario 6 included:

- 58% of Chinese visitor survey respondents stated that they have or intended to undertake this experience.

- Most Chinese respondents (70%) stated that they would be willing to pay between \$51 and \$500 for the experience, with 45% of these respondents being willing to pay between \$51 and \$100.
- The primary motivator was an interest in Aboriginal history, culture and traditions (n=29, 76% of those intending to undertake the activity) and the primary barrier to undertaking this experience was that it is not available in the destinations the tourists were visiting (n=19, 90% of those not intending to undertake the activity).

6.3.7 Scenario 7: Adventure Activity with an Aboriginal Guide

The appeal of 'joining an Aboriginal guide for a half day adventure activity' was considered by 46% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 3.0. Chinese respondents ($\bar{x}$ = 3.0) were significantly less likely ($p=0.045$) than other international visitors ($\bar{x}$ = 3.3) to find this experience appealing.

Key findings relating to Scenario 7 included:

- Almost half (49%) of Chinese visitor survey respondents stated that they have or intended to undertake this experience. The primary motivator to undertake this experience was an interest in Aboriginal history, culture and traditions (n=20, 45% of those intending to undertake the experience).
- The primary barrier to undertaking this experience was identified as a lack of interest (n=22, 49% of those not intending to undertake the experience).

6.3.8 Scenario 8: Visit Aboriginal Rock Paintings or Carvings

The appeal of 'visiting a remote outback location to see Aboriginal rock paintings or carvings' was considered by 31% of Chinese visitor survey respondents to be very appealing to extremely appealing (4 to 5 on a 5 point scale) with a mean of 2.8. Chinese respondents ($\bar{x}$ = 2.8) were significantly less likely ($p<0.001$) than other international visitors ($\bar{x}$ = 3.3) to find this experience appealing.

Key findings relating to Scenario 8 included:

- 69% of Chinese visitor survey respondents did not intend to or did not know if they would undertake the experience. This was largely due to a lack of interest (n=28, 47% of those not intending to undertake the activity).

- Most Chinese respondents (78%) stated that they would be willing to pay up to $100 for the experience.

6.4 Open Ended Responses – Chinese Visitor Survey Respondents

Chinese visitor survey respondents were asked at the end of the survey if they had any additional comments about Indigenous tourism in Australia. Responses to this question were received from 44 respondents although some of these related to the survey or their trip in general. However, the open-ended question provided a rich source of insightful qualitative data that identified a number of key issues from the respondents' point of view. Table 6.7 shows the three key themes that emerged from Chinese visitor survey respondent comments: 1) lack of information/advertising/promotion, 2) safety and comfort concerns, and 3) language barriers.

Table 6.8. Open Ended Survey Responses – Chinese Visitors

Theme	No. mentions	Example Quotes
Lack of information / advertising or poor promotion	14	Marketing and publicity is insufficient and these experiences are not provided by tour operator
Safety/comfort concerns	4	Feel uncomfortable with Aboriginal, worried about safety
Language barriers	3	Tour guide needs to have an excellent command of English and Chinese language skills in order to explain the Indigenous culture well

Chapter Seven: Results – Chinese Inbound Tour Operators, Chinese Expert Informants and Indigenous Tourism Operator Interviews

Three data sets were collected that focused on the supply side of Indigenous tourism and the inbound Chinese market:

1. Self-administered paper based surveys to 51 Chinese inbound tour operators.
2. Online survey for 18 Chinese expert informants
3. In-depth, semi-structured interviews with 34 Indigenous tourism operators (as per stage one of the study).

This Chapter will present the data sets for the Chinese inbound tour operators and where appropriate the results of the Chinese expert informant survey. Following this, the results emanating from the questions posed to Indigenous tourism operator interviews about the Chinese inbound market will be outlined.

7.1 Chinese Inbound Tour Operators and Chinese Expert Informant Results

7.1.1 Awareness of Australian activities and experiences

The majority of inbound tour operators (90.5%) and expert informants (93.8%) believed that Chinese visitors to Australia do not have much prior knowledge of the Indigenous tourism experiences available in Australia. Nevertheless, 78% of tour operators and 77% of expert informants believed that Chinese visitors to Australia do want an Indigenous experience. Further, 80% of Chinese tour operators claimed that they have some form of Indigenous content included in their tour itineraries (Table 7.1).

Inbound tour operator and expert informant respondents identified the following reasons that would drive Chinese demand for Indigenous tourism experiences:

- To meet an Indigenous person/take a tour with an Indigenous guide
- Buy a small genuine Indigenous art or artefacts
- Have a general introduction to Indigenous culture

On the other hand Chinese inbound tour operator respondents noted that Chinese visitors would not want an Indigenous tourism experience due to a variety of reasons which included:

- A general lack of knowledge/information of Indigenous culture

- A lack of promotion of Indigenous experiences in Australia
- A lack of interest/dislike of this type of experience
- Suitable only for special interest groups
- Other activities/experiences are a higher priority

Respondents raised the notion that Chinese inbound visitors are *"here for a very short time in each location and their time is taken up by seeing the major tourist attractions"*, or their priority is other activities, *"with the current ADS visa approval groups that travel to Oz are mainly shopping group. Most of the tour guide would take them to places which have no cost but would charge them a fee. Aboriginal experience to the tour guide is too time consuming and not profitable"* and "*I suppose Aboriginal culture wouldn't top the list of things they'd like to do, but most of them probably wouldn't mind having a taste of Aboriginal culture if it doesn't require much effort"*.

Table 7.1. Chinese Tour Group Itineraries –Included Activities

Activities included on itineraries	Activities not included on itineraries
National parks / state parks / world heritage sites/ botanical gardens	Pubs, clubs, discos and casinos
Sightseeing / looking around	Sports/ Adventure activities
Wildlife parks / zoos / aquariums	Attend theatre, concerts or performing arts
Visit cities and urban areas (Sydney Opera House)	Aboriginal site or community
Shopping	Health spa or wellbeing centre
Visit the reef	
Amusement / theme parks	
Museums, art galleries, history / heritage buildings, sites or monuments	
Visit or stay on an island	
Events, festivals, fairs and markets	
Visit the outback (Kakadu/Uluru)	
Aboriginal art, craft or cultural displays, performances (Rock art, paintings, Rainforestation, Tjapukai)	
Aboriginal tour guide	
Lifestyle/Australian culture	
Food and wine tours	

7.1.2 Preferences and Intentions

As with the visitor surveys outlined in previous chapters, both tour operators and expert informants were asked to identify the 'top' attractions/experiences that they believe Chinese visitors want during their visit to Australia (Table 7.2).

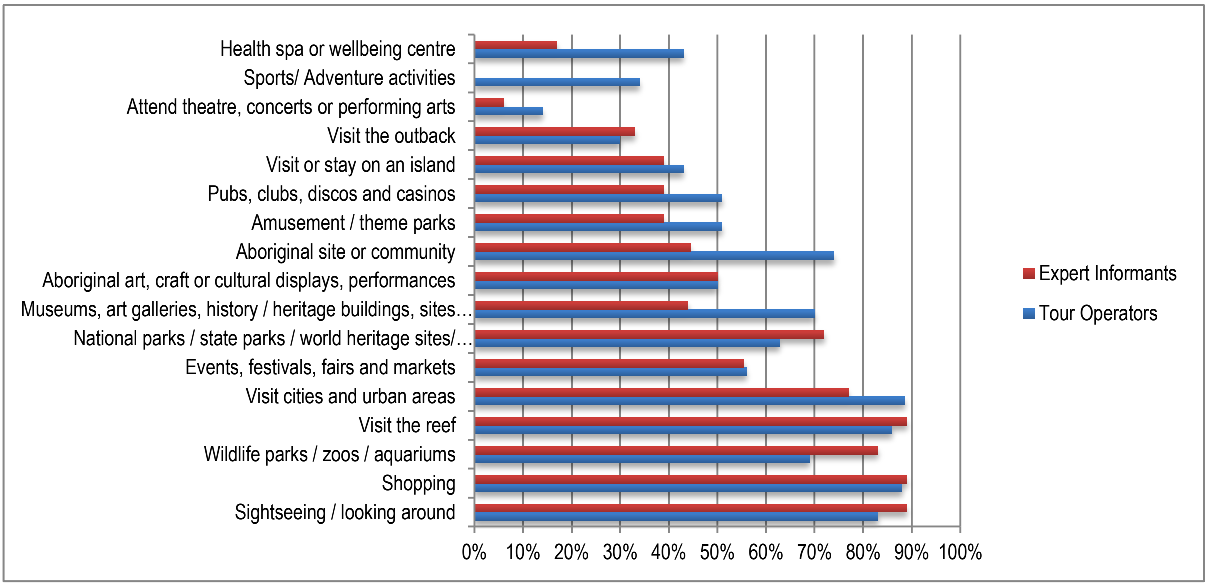
Table 7.2. Perceived Top Experiences for Inbound Chinese Visitors to Australia

Chinese tour operator respondents		**Chinese expert informant respondents**		**Chinese tour group respondents**	
	Percent (%)		Percent (%)		Percent (%)
Shopping	52%	Shopping	56%	Sightseeing/travel around	32%
Great Barrier Reef	48%	Cultural	50%	Beach	25%
Sightseeing/ travelling around	34%	Gourmet	39%	Active outdoor	19%
Wildlife	34%	Sightseeing/ travelling around	39%	Shopping	16%
Food and wine	27%	Wildlife	39%	Great Barrier Reef	15%
Theme parks	27%	Great Barrier Reef	28%	Cultural	14%
City Escapes	18%	City escapes	22%	National parks	13%
National Park	18%	Nature based	22%	Scenery/landscapes	13%
Opera House / Harbour Bridge	14%	Sydney Attractions	22%	Migration	11%
Red Centre / Outback	14%	Beach	17%	Wildlife	11%
Adventure	11%	Theme parks	17%	Buy property/invest	9%
Cultural	11%	Gold Coast	11%	Sydney attractions	9%
Beach	9%	Photo opportunities	11%	Leisure	8%
Clubs/gaming	7%	Adventure	6%	Social	7%
Social	7%	Casino	6%	Business	6%
Active Outdoor	5%	Indigenous	6%	Gourmet	6%
Indigenous	5%	Relaxation	6%	Indigenous	6%
Business	2%	Social	6%	Museums and theatres	6%
Gold Coast	2%			Education	5%
				Diving	5%
				Gold Coast	5%
				Relaxation	4%
				Volunteering	4%
				Adventure	4%
				Casino	4%
				Boating	3%
				City escapes	3%
				Uluru	3%
				Sport	2%
				Cairns	2%
				Fishing	2%

Chinese tour operator respondents n=44, Chinese expert informant respondents n=18, Chinese tour group respondents n=202

Inbound tour operators and expert informants were also asked to rate on a scale (where 1 is not at all important to 5 extremely important), the importance of particular activities/experiences for inbound Chinese tourists to Australia. Figure 7.1 shows the proportion of activities/experiences that were ranked very and extremely important (4 and 5 on the scale). Shopping, sightseeing/looking around, visit the reef, visit cities and urban areas and wildlife/parks/zoos/aquariums were considered by tour operators and expert informants as the most important for Chinese visitors to Australia. However, experiencing Aboriginal art, craft or cultural displays, performances and visiting an Aboriginal site or community were perceived as slightly less important experiences at (3.33) and (3.28) respectively. Regardless, 50% of tour operators and 50% of expert informants believed experiencing Indigenous art and craft to be very important to Chinese visitors (4 to 5 on the scale) while 59.5% of tour operators and 79% of expert informants believed visiting an Aboriginal site or community was important to Chinese visitors (3 to 5 on the scale).

Figure 7.1. Perceived Importance of Australian Experiences for Inbound Chinese Visitors



7.1.3 Indigenous Tourism Activity and Experience Scenarios

Both Chinese tour operators (Figure 7.2) and Chinese expert informants (Figure 7.3) were asked to consider abridged versions of the scenarios posed to respondents in the visitor surveys. 'Learning about/trying bush tucker/boomerangs' and 'purchasing locally produced art/craft' were considered by most respondents to be appealing to Chinese visitors. Of less perceived interest according to tour operators, was a 'tour with an Aboriginal guide' while both groups of respondents perceived 'staying in Aboriginal owned/operated accommodation' to be of low appeal to the market.

Figure 7.2. Chinese Tour Operators: Perceived Appeal of Indigenous Tourism Experiences

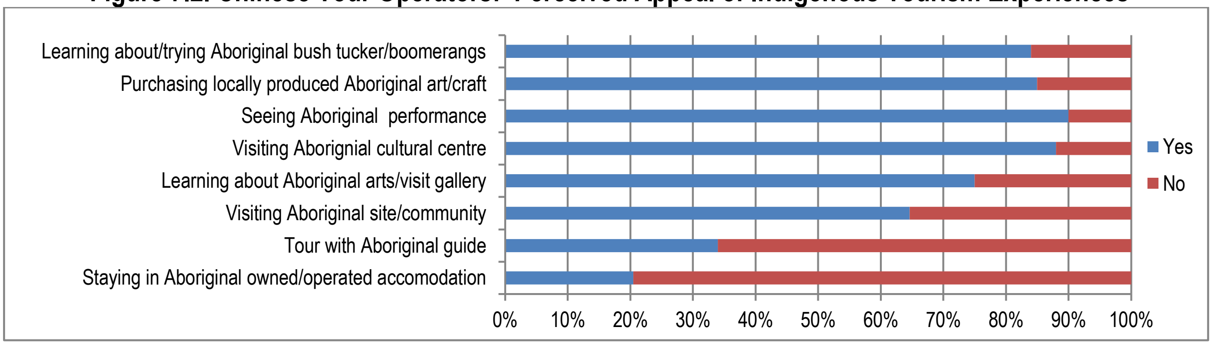
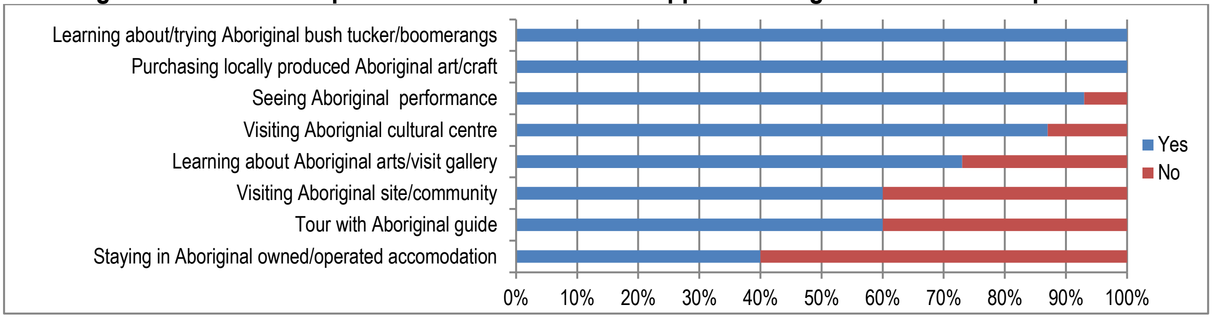


Figure 7.3. Chinese Expert Informants: Perceived Appeal of Indigenous Tourism Experiences



7.1.4 Product Development Opportunities and Barriers

Experiences/products that tour operators and expert informants suggested an Indigenous tourism business could and/or should provide if they wanted to be included in a Chinese tour company's itinerary included:

- Aboriginal cultural show
- Bush tucker/story telling
- Guided nature/environment tours with Indigenous guide (*maximum one hour*)
- Cultural centres (*where visitors could get a lot of information/experience in a short space of time*)
- Art/craft, rock paintings, carvings (*opportunity to try painting*)

Tour operators and expert informants identified several barriers and challenges associated with providing Aboriginal products and experiences on Chinese tours in Australia (Table 7.3) however they also identified a range of suggestions. For instance, that products and experiences need to be:

- Located in close proximity to major cities/ provide well-designed programs in the urban areas for people who do not have time to travel to the outback
- Short in duration
- Brochure and interpretation provided in Chinese
- Clear vocal presentations
- Competitive pricing
- Product information readily available
- Souvenir and shopping opportunities, improve general quality of facilities
- Well organised, consistency of service delivery and quality
- Experienced Mandarin speaking staff who can share the dreamtime stories (not literal translations)

- Provide more exposure to agents in China/joint promotion with interested organisations in China

Table 7.3. Challenges Associated with Indigenous Activities/Experiences

Challenge	Example quote/s
Language	The conversation and communication between us and Aboriginal people Due to language problem, most Chinese visitors cannot accept Aboriginal tour guide for them
Cultural barriers	To convince tourists to accept/experience due to the lifestyle and condition of the place
Product availability/awareness	At the moment not much information is provided by Tourism Australia on these activities The tourist infrastructure in WA or among other Aboriginal tourism attractions is not well developed or targeted at the Chinese market.
Product standard	Most of the Aboriginal performances are very similar and not interactive with the tourists and not too entertaining
Timing	Not enough time to include in the schedule
Pricing	Increase net cost; always fighting on price and other operators still getting shopping subsidies
Interest	Tourists may not interest especially when they have other choices
Logistics	Not sure how to include it into the tour itineraries
Location and access	It's good for put Aboriginal dance into itinerary but Chinese prefer stay in hotel not Aboriginal own accommodation

7.2 Indigenous Tourism Operators and the Chinese Market

A series of questions were posed to the Indigenous tourism operators that participated in the study specifically focused on the inbound Chinese tourist market.

7.2.1 Importance of the Chinese market

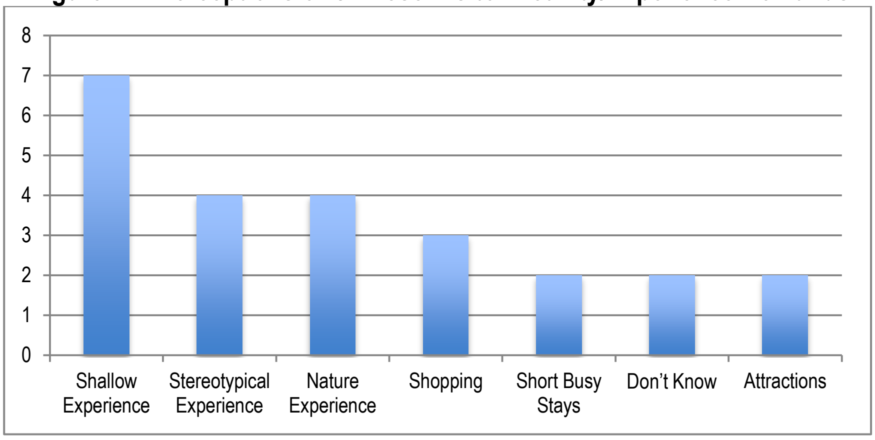
Of the 34 Indigenous tourism operators interviewed for this study, few (7) were interested in the emerging Chinese market (*"it's important, but we would probably do a lot better if we could get some, but I don't see them"*) and even less operators (4) reported any dealings with Chinese visitors.

While a number of the operators recognised the importance of the market over the next 10 years ("*I think they're going to be important to everyone in the next 10 years…"*) and the opportunities the market can provide (*"I'm sure it's going to be beneficial for the country and a lot of tour operators"*), most operators were not interested in pursuing the Chinese market (*"we've looked at the China market, we've been to…China awareness workshops...I've certainly got great knowledge of the expectations and needs of that market and it doesn't make me want to run and chase it*, and, *I've seen them in the region; it doesn't want to make me have them as my tourists"*). A number of operators (8) also maintained that the Chinese market has little interest in Indigenous tourism experiences (*"Chinese* *people aren't interested in Aboriginal culture"*), while a further six participants claimed that they did not want to pursue or engage with the Chinese market.

7.2.2 Understanding of the Chinese market

Indigenous tourism operators perceived Chinese visitors to Australia to be generally seeking a shallow experience (see Figure 7.4); that is, they are not looking for a deep cultural experience or opportunities to learn about others cultures but rather opportunities where they can shop, play and relax (*"a three day, non-Indigenous tour, that's what they come over for - it's wham bam*, and, *they just want to throw the boomerang and want to see the dance performers. So Asians want this very shallow experience"*). The operators felt that if the Chinese visitors participate in an Indigenous tourism experience, their main priority will be to see and/or experience a stereotypical Indigenous experience (i.e., throw a boomerang or watch a dance performance) (*"they do want gimmicky...they love it. Yeah, just working at xxx they love all the gimmicky stuff up there and they're not interested in anything else. So they'll want bush tucker, dances…"*), nature experiences (*"it's more the nature, nature based experience for that sort of market and that international market"*) and shopping ("*I think they'd rather go to a major capital city or shopping or casino"*).

Figure 7.4. Perceptions of Chinese Visitor Activity/Experience Demands



As noted previously, few of the Indigenous tour operator participants had previous experience with the Chinese inbound market. However, those participants that have had some involvement with the Chinese market discussed a variety of experiences and issues including:

- The need to customise products to suit Chinese visitor needs
- The Chinese market is very cost conscious/sensitive
- They are a 'high maintenance' customer and require tours to be very organised
- Dealing with culture/language barriers

- They have little to no understanding of Indigenous culture and are not interested in cultural tours

Indigenous tourism operators reported obtaining their knowledge about the Chinese inbound visitor market from a variety of sources including:

- Government organisations such as STO's and peak associations
- Market research
- Networks
- Personal observations
- Seminars/workshops
- Don't seek/receive knowledge on this market

7.2.3 Strategies for the Chinese market

Although a number of participants claimed that they are not seeking to target the Chinese market, those businesses that are targeting the Chinese market, currently employ a number of strategies including:

- Marketing (i.e., advertising in Chinese publications, website launch, listing on Chinese search engine, employing a Chinese wholesaler, staff attending trade shows in China)
- Employing Mandarin speaking staff, training guides in Mandarin
- Leveraging government agencies
- Utilising technology (i.e., developing digital content, iPhone for translation)
- Looking into becoming ADS approved and attending Meeting Place (inbound tourism operators)
- Modifying product to suit market including evaluating pricing
- Nothing "just watching at the moment"

Chapter Eight: Discussion – Stage Two

The overall aim of the second stage of the research was to provide some of the first insights into inbound Chinese visitor demand and consider this in the context of Indigenous tourism supply. Although China is regarded as one of Australia's growth tourism markets, there has been no empirical research in this area with the exception of the national statistical collections.

Chapters Six and Seven have reported on the findings from each of the questions relating to Stage Two of the study. Specifically, the Stage Two findings relate to the following objectives: 1) investigate the expectations, experiences and motivations, of Chinese visitors (independent and tour) regarding Indigenous tourism products and services in Australia (Chapter 6), 2) investigate the perceptions, expectations and decision making processes of Chinese inbound tour operators (complimented with Chinese expert informants) regarding Australian Indigenous tourism products and services (Chapter 7) and 3) investigate the expectations, experiences and motivations of Indigenous tourism operators regarding the provision of activities and experiences for the Chinese visitor market via 34 in-depth interviews with Indigenous tourism operators (Chapter 7).

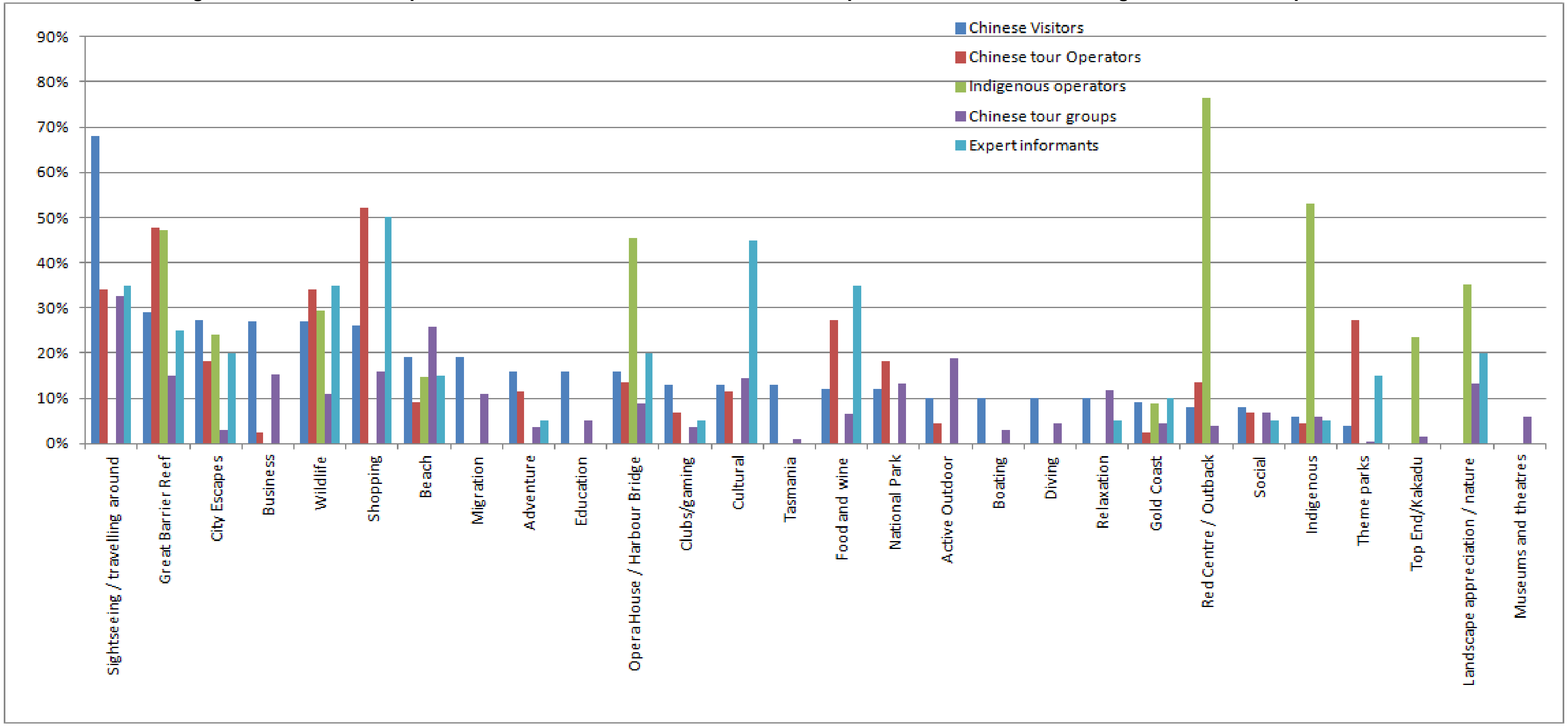
This Chapter will present the analysis and mapping of: demand for Australian tourism experiences, awareness, preference and visitation along the attrition curve; the barriers to participating in Indigenous tourism; and, the appeal, intentions and willingness to pay on a series of Indigenous tourism scenarios.

8.1 Australian Tourism Experiences: Mapping Chinese Demand

Comparisons can be made between the various data sets with regard to what are perceived to be the 'top' or 'must see' tourist attractions or experiences for Chinese visitors to Australia. This is presented in Figure 8.1 for Chinese visitors, Chinese tour operators and expert informants, and Indigenous tourism operators. Chinese visitor survey respondents were asked: "if you had unlimited time and money what are the top 5 things you would like to do while in Australia?" and Chinese tour operators and expert informants asked "what activities and experiences do you think Chinese tourists are coming to Australia for?"

'Sightseeing/travelling around' was the most frequently cited attraction or experience by both Chinese visitors and Chinese tour groups, followed closely by 'shopping' and 'going to the beach'. Indigenous tourism operators and expert informants perceived 'visiting the Great Barrier Reef' as one of the top attractions Chinese visitors wanted to experience. Importantly, Indigenous tourism operators placed ‘visiting the red centre/ outback’ and ‘Indigenous tourism’ as the two top attractions Chinese visitors wanted to experience, despite the fact that most operators were reasonably sceptical of the Chinese market’s interest in Indigenous tourism. Figure 8.1 highlights considerable disparity in the perceptions of the various groups regarding the attractions and experiences/activities inbound Chinese visitors would like to undertake while in Australia.

Figure 8.1. Perceived 'Top' Attractions in Australia: Chinese Visitors, Operators/Informants and Indigenous Tourism Operators



*In order of most frequently cited Chinese visitors responses

Figures 8.2 and 8.3 graphically demonstrate the disconnect between the Indigenous tourism operators and Chinese visitors' perceptions of the top attractions in Australia. Indigenous tourism operators have considerably overestimated Chinese visitor demand for Indigenous tourism products and experiences (Figure 8.2). Figure 8.3 however, shows slightly more synergy between Chinese tour operators/expert informants and Chinese visitor respondents.

Figure 8 2. Perceived 'Top' Attractions in Australia: Chinese Visitors and Indigenous Operators

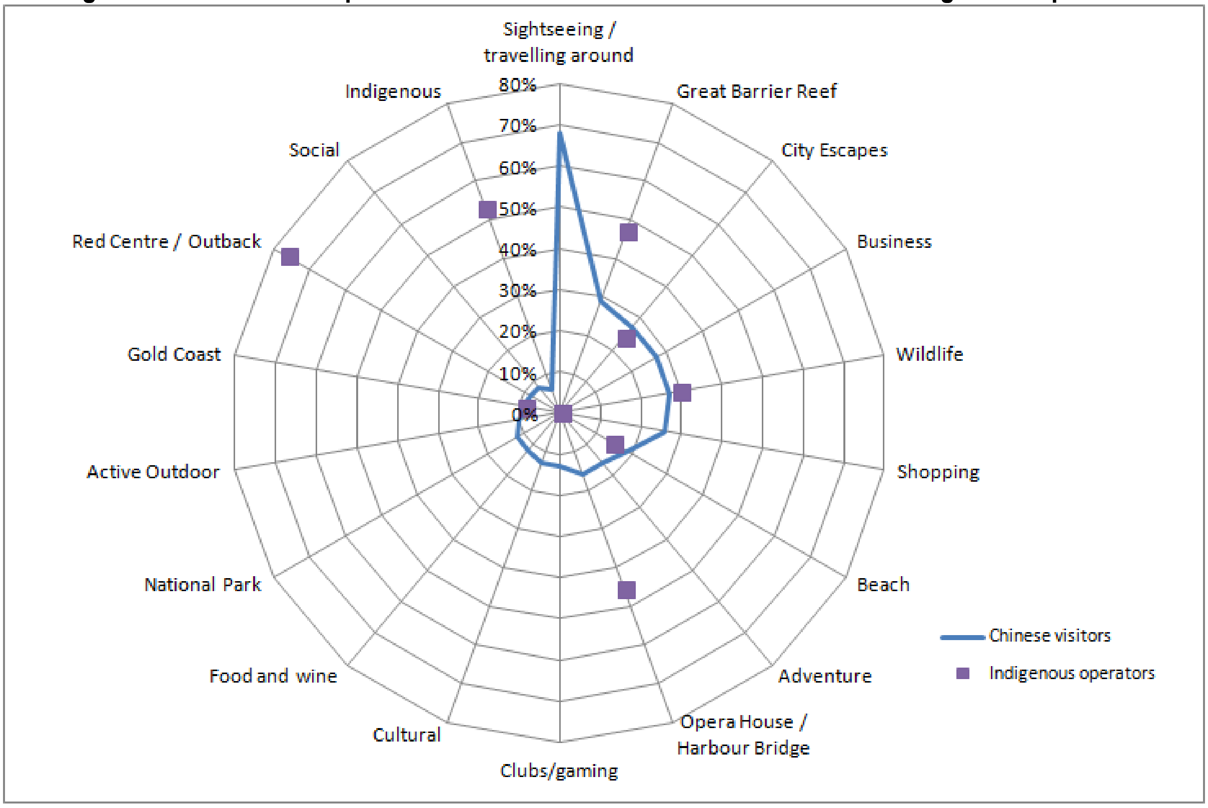
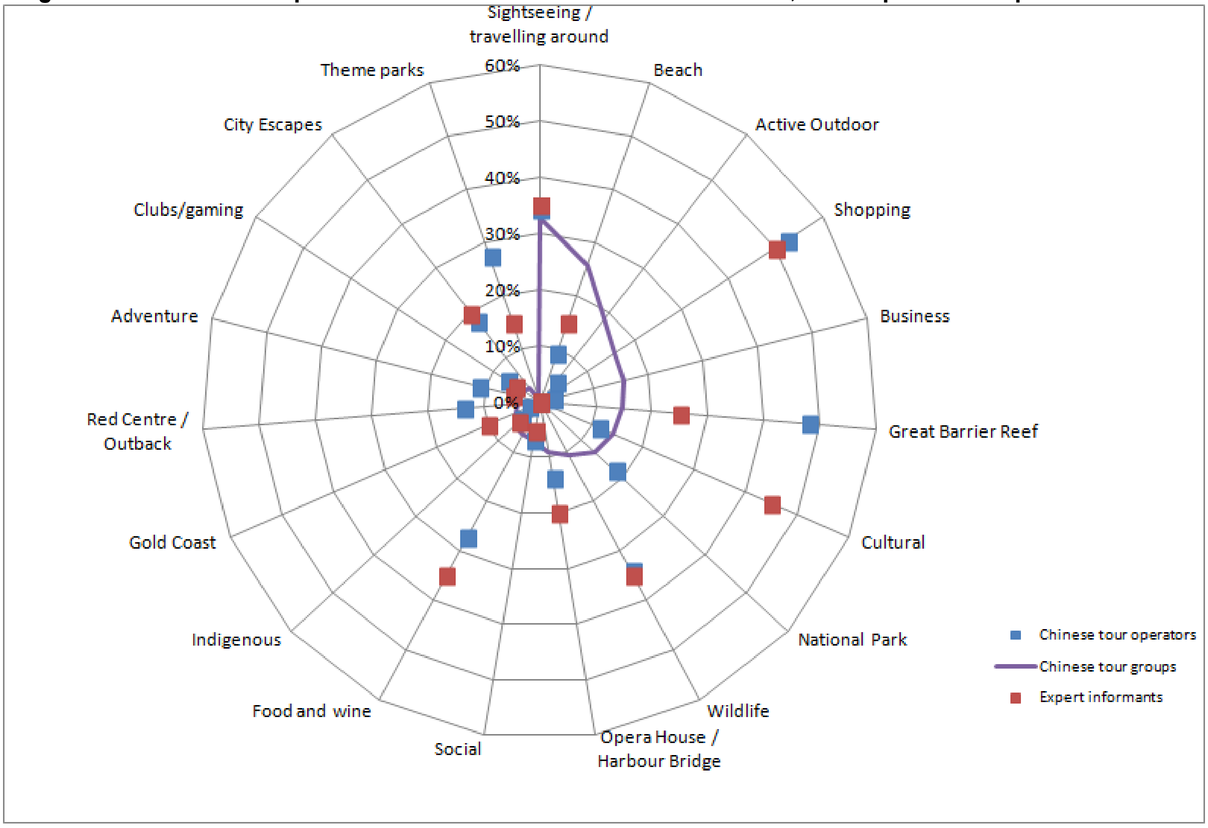


Figure 8.3 Perceived 'Top' Attractions in Australia: Chinese Visitors, Tour Operators/Expert Informants



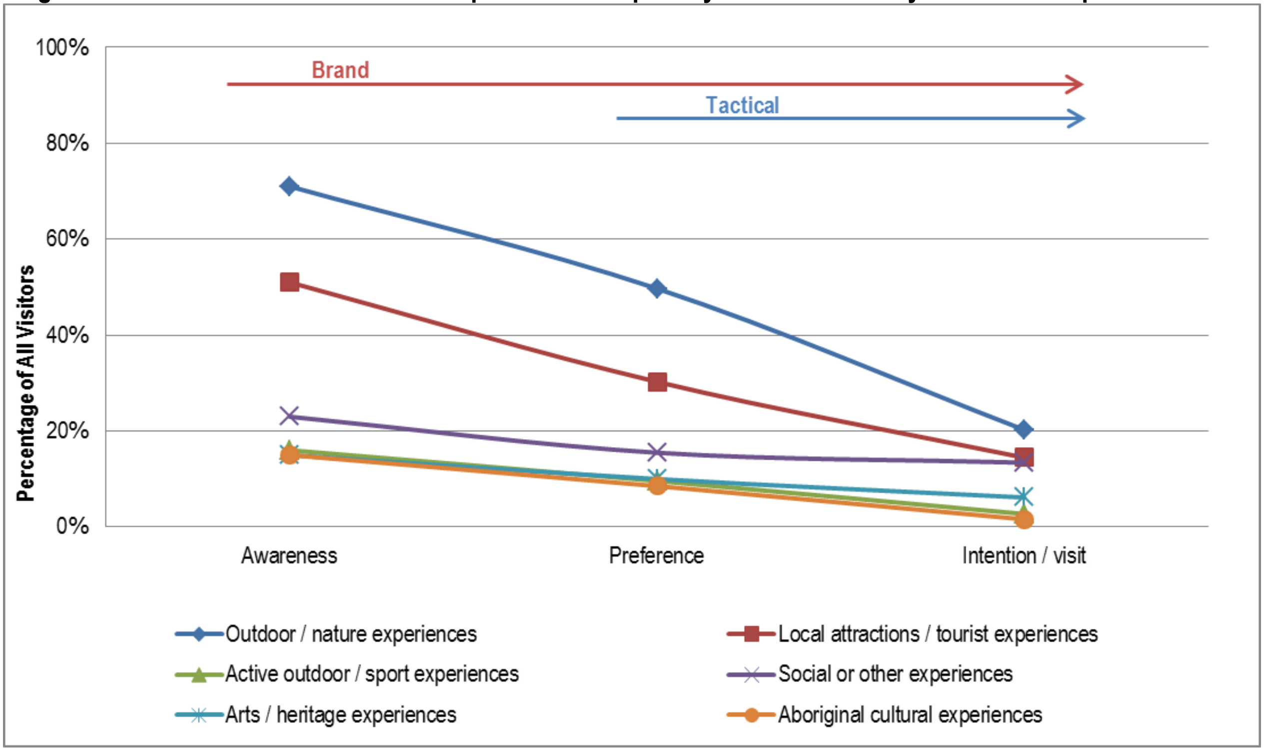
8.2 Attrition Curve: Mapping Awareness, Preference and Visitation

As noted in Chapter Five, the 'Attrition Curve' represents a traveller's destination or product choice from awareness, preference, and intention through to visit (see Figure 5.5). Again, the surveys administered to the Chinese visitor survey sample facilitated analysis and measurement of various questions about Indigenous tourism in the context of the attrition curve. To identify 'awareness' visitors were asked, without prompting, "what experiences are you aware of the can be undertaken in Australia?" The methodology employed in Stage One of the report (see page 80, Section 5.2) was replicated with the Chinese data sets.

The Chinese visitor survey 'Attrition Curve' (Figure 8.4) is quite similar to the general visitor Attrition Curve from Stage One of the study (See Figure 5.6). It shows that there is relatively high awareness of Australia's 'outdoor/nature experiences' amongst Chinese visitor respondents. Additionally, there is also reasonably high preference for this product, but lower actual intention to undertake the experience (which is demonstrated by the convex attrition curve). Whereas, the concave 'social or other experiences' curve flattens between preferences and intention, indicating Chinese visitor respondents have a high intention of undertaking social experiences while on their trip. In comparison, the

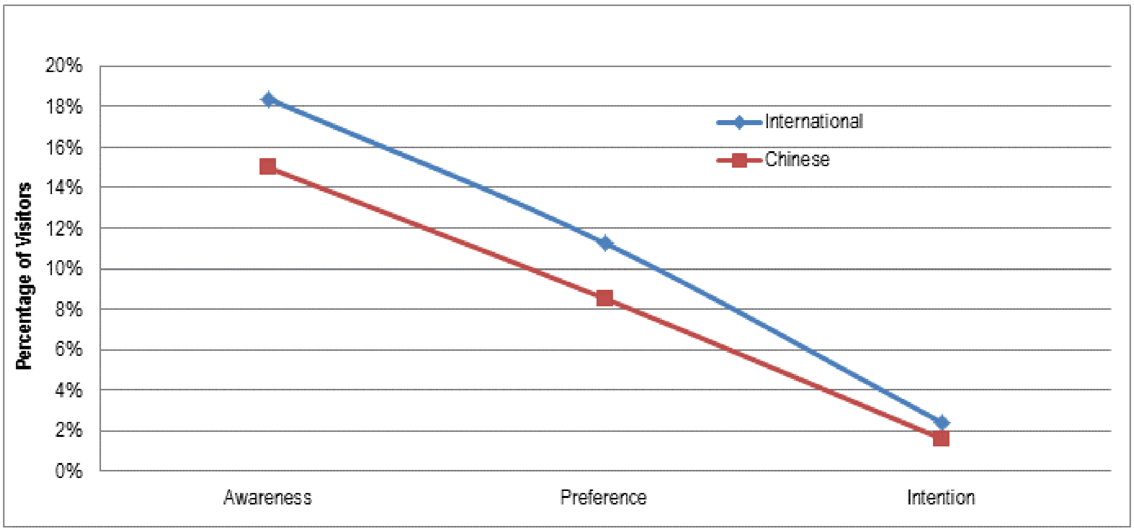
'Aboriginal cultural experiences' curve is very flat indicating that amongst Chinese visitors, Indigenous experiences have the lowest awareness, preference and intention to undertake.

Figure 8.4. Attrition Curve: Chinese Respondents' Propensity to Undertake Key Australian Experiences



Concomitantly, Figure 8.5 shows that for Chinese visitor survey respondents, 'top of mind' awareness of Indigenous tourism products and experiences is reasonably low. For Chinese visitors, awareness is at less than 16%; for all international visitors awareness is approximately 20%.

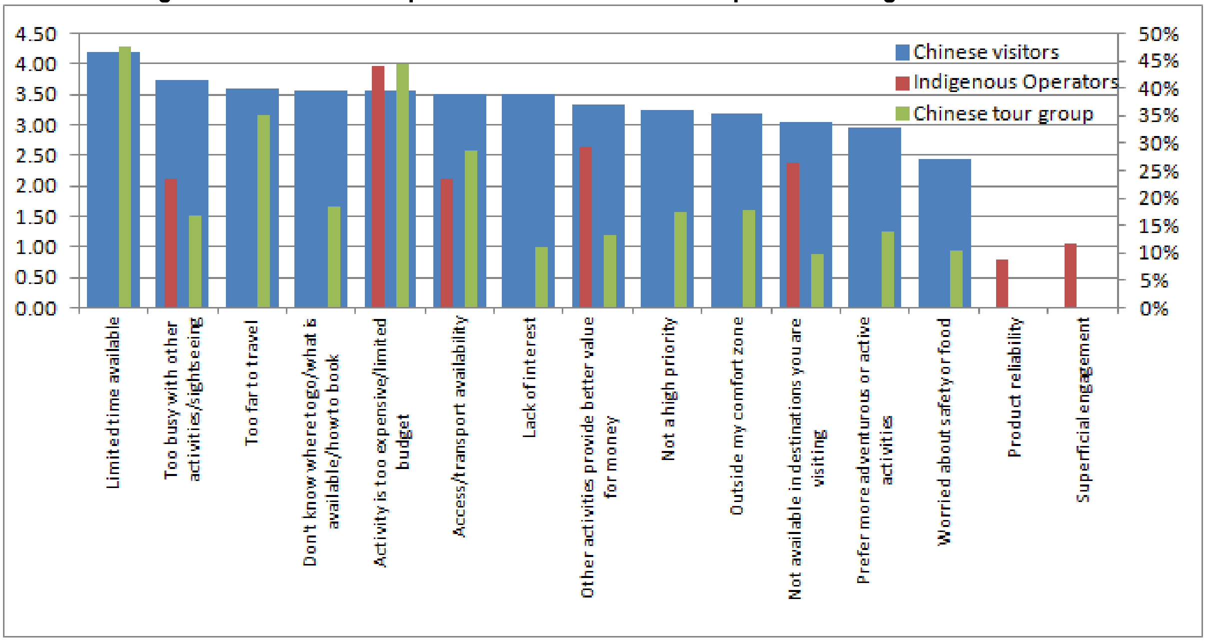
Figure 8.5. Attrition Curve: Aboriginal Cultural Experiences – Chinese Visitor Survey Respondents



8.3 Participation in Indigenous Tourism: Mapping the Barriers

Over and above a lack of promotion and/or awareness of the product, there were a range of barriers and challenges to participating in Indigenous tourism experiences for both Chinese visitor survey respondents and Chinese tour group respondents including time, cost and distance (Figure 8.6). Indigenous tour operators demonstrated they were aware that the cost of some Indigenous tourism experiences may be a barrier for Chinese visitors and also that these visitors may have other activities on their tour agenda that take precedence over Indigenous tourism activities. Chinese tour operators also noted challenges and barriers to participation as time, cost sensitivity, location.

Figure 8.6. Chinese Respondents: Barriers to Participation in Indigenous Tourism



8 .4 Indigenous Tourism Scenarios: Motivations, Appeal and Barriers

Using the same methodology as Stage One of the study, respondents were posed the following eight hypothetical scenarios of potential Indigenous tourism product experiences:

- Two hour walking tour with an Aboriginal Guide
- Stay overnight in a remote Aboriginal Community/on Aboriginal
- Experience an Aboriginal cultural show or performance
- Stay overnight in a luxury cabin on Aboriginal land
- Experience and aboriginal museum display
- Full day tour with an Aboriginal guide
- Half day adventure activity with an Aboriginal guide
- Visit remote Aboriginal rock paintings or carvings.

Each of the scenarios and associated questions has been presented in detail in Chapter Three. As this section of the research was not designed to map against operator participants, the following section is a cumulative discussion of the scenario results.

Activities such as 'full day tour with an Aboriginal guide' to key Australian attractions, as well as 'an adventure activity with an Aboriginal guide' had the highest appeal ratings on a five point scale. However, as can be seen in Table 8.1, the appeal ratings for these and other scenario options sit around the mid-point of the scale, thus suggesting that these activities have a reasonably neutral appeal across the sample. These findings are consistent with those in Stage One of the study (see page 107, Section 5.4) for all visitors.

Table 8.1 Appeal of Indigenous Tourism Activity Experience Scenarios: Chinese Visitors

	Chinese visitors		Chinese tour group visitors
Experience	Appeal	Prompted Intention/visit (% respondents)	Appeal
Two hour walking tour with an Aboriginal Guide – within driving distance of a capital city	3.0	38.1	3.2
Stay overnight in a remote Aboriginal community/on Aboriginal land – shared facilities	2.3	23.0	3.1
Experience an Aboriginal cultural show or performance – part of a larger tourist attraction	3.2	61.5	3.4
Stay overnight in a luxury cabin on Aboriginal land – remote, private facilities	3.0	29.3	3.5
Experience an Aboriginal museum display*	3.0	50.5	3.2
Full day tour with an Aboriginal guide – iconic attractions, regional location	3.3	58.1	3.6
Half day adventure activity with an Aboriginal guide	3.0	49.4	3.7
Visit remote Aboriginal rock paintings or carvings	2.8	31.4	3.2

The most cited motivation for undertaking at least one of the Indigenous scenario experiences was an interest in Aboriginal history, culture and traditions (54%) (Figure 8.10). Concomitantly however, the most cited barrier to undertaking the scenarios was a lack of interest in the scenarios presented (65%) (Figure 8.11).

Figure 8.7. Motivations to Participate in Indigenous Tourism: Aggregated Scenario Responses for Chinese Visitors

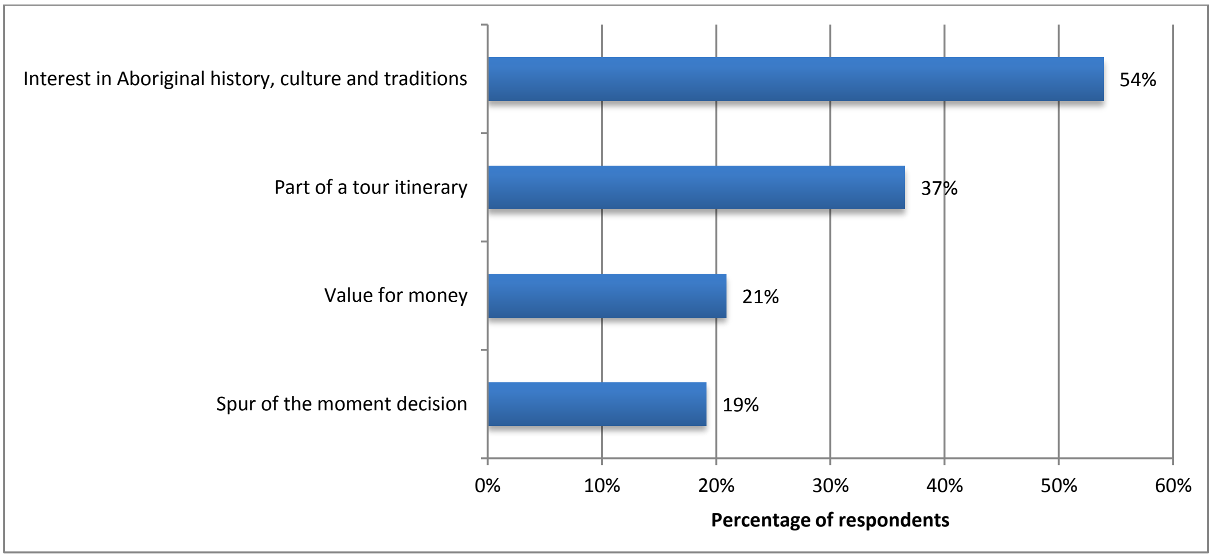
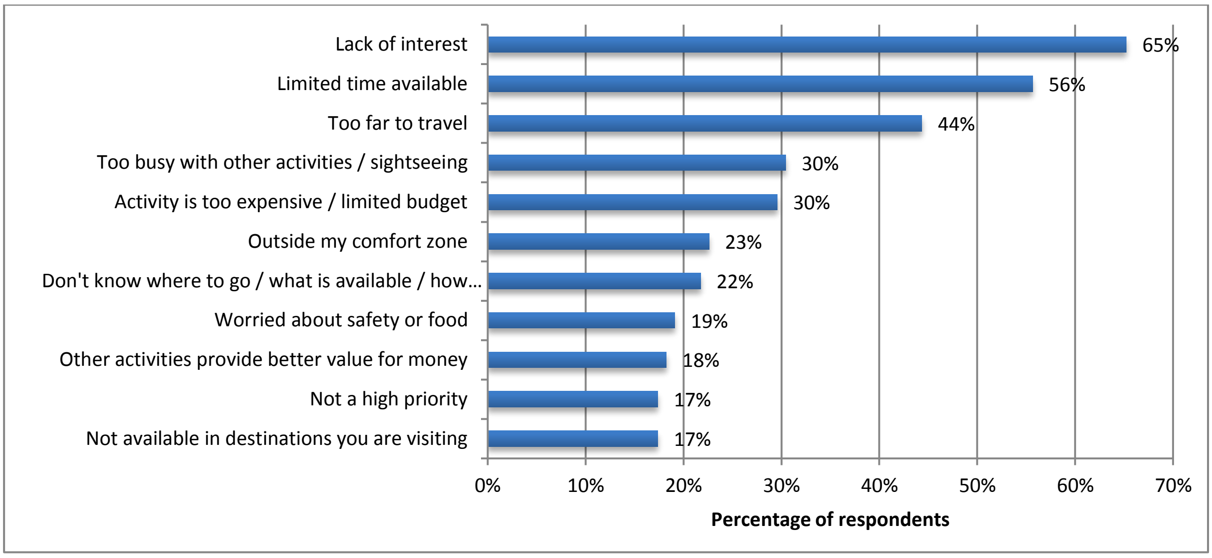


Figure 8.8. Barriers to Participation in Indigenous Tourism: Aggregated Scenario Responses for Chinese Visitors



These findings concur with Jones (2009) who claimed there is latent appeal for Indigenous tourism attractions and experiences. This is substantiated by an increase in intention to participate (by all visitor respondents across the study) when prompted about specific Indigenous tourist scenarios. Thus, there is arguably, potential to grow this market.

Chapter Nine: Conclusions and Recommendations – Stage One and Two

The purpose of this study was to undertake a gap analysis to increase understanding about the demand for, and supply of, Indigenous tourism in Australia. Indigenous tourism is an integral part of Australia's tourism product with Indigenous tourism being one of the key experiences underpinning Tourism Australia's global marketing activities. Yet engagement in Indigenous tourism experiences by both international and domestic markets has been declining since 2006 (Tourism Research Australia, 2011). Despite conflicting reports pertaining to the success (or not) of Indigenous tourism in Australia, arguably, this sector of the tourism industry has not been realising its full potential nor is it convincingly securing a sustainable presence in the increasingly competitive global marketplace.

Over and above contending with external pressures including an unstable global economy, a high Australian dollar and declining inbound visitor numbers, the Indigenous tourism 'sector' in Australia has also had to contend with internal pressures such as negative perceptions about Indigenous Australians, lack of capacity, concerns over marketing messages, and in many instances, the range of challenges inherent in operating in remote locations. Therefore, this study sought to identify and understand discrepancies between the demand for, and supply of, Indigenous tourism products in Australia in order to identify, understand and develop strategies for responding to the discrepancies between demand for, and supply of, Indigenous tourism products in Australia. The findings of this study provide the basis for the project stakeholders to develop appropriate strategies to recognise the potential of this sector.

Based on the findings presented in the preceding chapters, a series of recommendations and implications are proposed around:

9.1 Understanding the Market

The findings of the study clearly indicated that Indigenous tourism operators are not in sync with what the inbound market to Australia is looking for. While the operator participants did identify a number of similar experiences they believed tourists are looking for, in many cases the perceived importance of these experiences were overestimated. A particular example here would certainly include the operators' understanding of the international market's demand for Indigenous tourism, ranking it second, while international tourists' preference for Indigenous tourism was less than 5%. Similarly, overestimating visitor demand for remote or non-urban locations shows a lack of understanding of Australia's visitor markets. This suggests that some Indigenous tourism operators have a lack of understanding about their market(s), despite having access to some of the best, readily and freely available tourism market intelligence. Indigenous tourism operators must fully understand the needs and demands of the market to bridge the identified demand and supply gaps.

These findings indicate action is required in regard to exploring the information needs of operators as well as the dissemination channels; as noted Australia has some of the most comprehensive tourism statistical and market data available. A suggested starting point should be to ascertain operator's current usage of the available statistical and market data provided by tourism agencies.

Recommendations:

- Explore the knowledge needs of Indigenous tourism operators, as well as the uptake and usage of tourism market data.
- Re-evaluate and/or develop more appropriate communication channels to meet Indigenous tourism operators' knowledge needs.
- Assist Indigenous tourism operators with identifying, interpreting and/or collecting relevant data sources.

9.2 Awareness of Indigenous Tourism

Modelling awareness, preferences and intentions of visitors along the Attrition Curve; specifically designed to elicit more realistic insights into actual market perceptions and intention; provided valuable insights into the market. While there have been assumptions about the high levels of interest from the international market, the Attrition Curve showed that there was in fact very little difference between the international and domestic markets. International visitors have low unprompted awareness of available product. Of more concern is the preference for Indigenous tourism, which falls sharply on the Attrition Curve. Here the preference is largely on par with domestic tourists.

The domestic market is largely unaware that there is an Indigenous tourism sector in Australia. This finding is surmountable through increased education and targeted marketing strategies. However, addressing the issue of preference and intention is more challenging. This study found that once respondents were made aware of the range of product options via the scenario questions, preferences and intention still declined sharply. Despite this, the domestic market should not be dismissed as a potential target market given that the findings of this study show it to be on par with international interest.

Recommendations:

- Continue/increase the promotion of export ready Indigenous tourism businesses through international distribution channels and targeted marketing campaigns.
- Integrate micro, small and start-up businesses into local tourism distribution channels to increase product awareness.
- Develop awareness/marketing programs targeted at the domestic market that highlight the range of Indigenous offerings available in Australia. Strategies to overcome the low levels of interest and participation in Indigenous tourism will also be necessary.
- Develop strategies to overcome negative perceptions amongst the domestic market.
- The development of a brand logo may contribute to enhancing the profile of Indigenous tourism products in the marketplace. The use of a consistent and recognisable logo could address some of the identified awareness issues amongst the visitor segments and provide a means for visitors to more readily identify Indigenous tourism product that is embedded in mainstream tourism operations.

9.3 Barriers

The survey design, by operational necessity, did constrain the option to elicit richer understandings of the barriers for visitors engaging in Indigenous tourism activities and experiences. However, most of the barriers were neutral in their impact (i.e., rated at the mid-point of the scale).

The operators appeared to be focused on the issue of racism and negativity towards Indigenous peoples. However, while it is acknowledged that visitor respondents may not have disclosed their true thoughts on culturally sensitive issues, arguably there were ‘racist’ and/or negative connotations in many of the open ended comments. Issues pertaining to racism are well beyond the scope of this research. More targeted research, focused solely around eliciting barriers through alternative methodologies could address this knowledge gap. Certainly the Indigenous tourism operators need a better understanding of the barriers to Indigenous tourism to ensure the ongoing development of sustainable enterprises.

Recommendations:

- Develop a targeted marketing and educational campaign to demonstrate to the broader community, the scope and breadth of Indigenous tourism operations in Australia.
- Develop strategies to assist operators overcome barriers to participation.

9.4 Authenticity

Visitor respondents identified motivations for participating in Indigenous tourism that included a desire to learn more (i.e., education) and an interest in Indigenous cultures. However, the main issue to arise is centred on the 'authentic' portrayal of Indigenous peoples and their culture and traditions. Operators voiced concerns pertaining to visitors' desires and expectations to see stereotypical images of Indigenous people with little to no acceptance of, and/or expectation to, engage with contemporary Indigenous Australians.

Recommendation:

- Support Indigenous tourism operators in developing products and experiences that are reflective of contemporary Indigenous culture while balancing visitor demand and expectations.

9.5 Indigenous Tourism Scenarios

An important part of the methodology of this study was the scenario questions. The use of scenarios were designed to measure the relative appeal of a number of different experiences that could be undertaken in urban or remote areas, and would target different visitor interests (i.e., adventure, luxury). The scenarios also sought to identify some approximate price points that visitors would be willing to pay as cost related to Indigenous tourism activities has also a big factor. The willingness to pay is a further (and arguably more insightful) indicator of actual demand for Indigenous tourism.

The scenarios provided some definitive findings with regard to the appeal of a wide range of product and experience options. However, there was little difference in the relative appeal of these in spite of the nature or location of the activity. Where respondents did indicate an options was appealing, participation or intention halved as was seen on the various Attrition Curves. Willingness to pay for the activities is a further indicator of demand and in this visitor sample respondents had reasonably low price points relative to the types of activities or experiences.

A number of barriers were confirmed through the scenarios which are consistent with other data collected in this study. Those that had expressed an interest in Indigenous tourism activities saw barriers to their participation such as: a lack of time, other activities taking precedence, and budget/expense of the activity. Not surprisingly for those that reported low appeal and intentions in the scenarios, the reason was due to a lack of interest.

Recommendations:

- Undertake realistic assessments of product gaps vis-à-vis tourist flows and demand patterns thus moving away from supply led, 'build it and they will come', approaches to demand driven product development.
- Focus on development in urban centres and surrounds to capitalise on existing visitor traffic.

9.6 Chinese Inbound Market

The Chinese visitors surveyed in this study also showed little interest in participating in Indigenous tourism opportunities due to, among other things, a lack of awareness of Indigenous tourism. Nevertheless, the results of the scenarios suggested there is latent demand (albeit minimal at this stage) for Indigenous product however, barriers including pricing, location and safety were cited by Chinese visitors as reasons for not pursing an Indigenous tourism experience during their visit to Australia. Furthermore, inbound tour operators cited numerous barriers to including Indigenous tourism experiences on their tour itineraries while many Indigenous tourism operators expressed little to no interest in pursuing the Chinese inbound market in the near future.

Recommendations:

- Develop marketing campaigns to increase awareness of Australia's Indigenous tourism products; this should be targeted at both visitors and tour operators given the prevalence of group tours in this market.
- Assess identified barriers to participation and re-evaluate and/or develop product for the Chinese inbound market.
- Investigate lack of interest from some Indigenous tourism operators to pursue the Chinese inbound market and facilitate opportunities for operators to explore the potential of this growth market.

9.7 Closing Remarks

This study has identified a number of points where a disconnect exists between Indigenous tourism operators, visitor markets and government (via policy and marketing). The research design is such that much emphasis has been placed throughout the report on the shortcomings of the Indigenous operators themselves. However, 'blame' cannot be apportioned to any one group. There is certainly an ongoing challenge in balancing the often contradictory expectations of visitor segments' inherent expectations and demands of an Indigenous experience against the realities of a contemporary Indigenous tourism offering.

Although marketing strategies were not a focus of this research per se, the identified low levels of awareness and demand do point to issues of marketing and promotion. It must be acknowledged however, that agencies such as Tourism Australia have been, and continue working to launch market ready Indigenous tourism product.

Low levels of demand for current product do point to opportunities such as packaging of Indigenous tourism content into mainstream tourism product offerings such as accommodation, restaurants and retail. This approach is advocated for instance in Tourism Queensland's Indigenous Tourism Strategy. Other options include complimenting an existing tourism attraction or experience with an Indigenous element, in culture, interpretation, history or nature (i.e., Dreamworld, Currumbin Wildlife Sanctuary).

The findings of this study provided valuable and empirical insights into actual demand, preferences and intentions of international and domestic tourists. Mapping this demand against Indigenous tourism operators highlights key junctures where strategies are required. Although since the publication of the first National Aboriginal and Torres Strait Islander Tourism Strategy in 1997 there has been much progress in the development of this niche sector, which now has world class export businesses operating around the country such as those in Tourism Australia's Indigenous Tourism Champions program, this study has clearly demonstrated there still remains much scope to improve the sustainability of Australia's Indigenous tourism sector.

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