

# SNAPSHOTS 2011

## INDIGENOUS TOURISM VISITORS IN AUSTRALIA



Australian Government  
Department of Resources, Energy and Tourism  
Tourism Research Australia



### Background

Australia's Indigenous culture is a key point of differentiation in a highly competitive international tourism market. Australia's Indigenous tourism experiences are one of the seven key experiences which underpin Tourism Australia's global marketing activities. Under the National Long-Term Tourism Strategy, Australian Tourism Ministers have established the Indigenous Tourism Development Working Group, chaired by Tourism NT, to examine ways to improve the quality and quantity of Australia's Indigenous tourism product offering and to maximise the participation of Indigenous Australians in the tourism industry. For more information on this group see [www.ret.gov.au](http://www.ret.gov.au)

Using data from Tourism Research Australia's (TRA) *International Visitor Survey (IVS)* and

*National Visitor Survey (NVS)*, this snapshot profiles international and domestic overnight Indigenous tourism visitors for 2010.

### Definitions

An Indigenous tourism visitor is one 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 qualify as Indigenous tourism activities:

- visit an Aboriginal site or community;
- experience Aboriginal art/craft or cultural display.

The definition of an international Indigenous tourism visitor also includes *attending an Aboriginal performance*.

**Figure 1: International and domestic Indigenous tourism visitors, 1999–2010**



**Table 1 International and domestic overnight Indigenous tourism visitors, nights and average expenditure, 2006–2010**

	2006	2007	2008	2009	2010	Change 2009/10 %	Average annual growth 2006–2010 %
<b>International</b>							
Visitors ('000)	842	837	785	709	689	-2.9	-4.9
Average expenditure per visitor (\$)	4,240	4,477	4,777	5,057	4,800	-5.1	3.1
Visitor nights (million)	42	41	42	40	38	-6.2	-2.6
Average expenditure per night (\$)	85	92	90	90	88	-1.8	0.7
Total expenditure (\$ billion)	3.6	3.7	3.7	3.6	3.3	-7.8	-1.9
<b>Domestic overnight</b>							
Trips ('000)	700	677	456	367	306	-16.6	-18.7
Average expenditure per visitor (\$)	1,757	1,706	1,571	1,746	1,604	-8.1	-2.3
Visitor nights (million)	7.1	5.6	4.8	3.1	2.5	-19.2	-23
Average expenditure per night (\$)	174	205	149	205	194	-5.2	2.7
Total expenditure (\$ billion)	1.23	1.15	0.72	0.64	0.49	-23	-21

Other visitors are defined as international or domestic overnight visitors who do not participate in Indigenous tourism activities while in Australia.

Estimates for Indigenous tourism visitors (and other visitors) capture all activities on their trip, and are not limited to Indigenous tourism activities. Regional areas exclude the eight capital city tourism regions and the Gold Coast tourism region.

### International visitors

#### What are the recent visitor trends?

In 2010, the international Indigenous tourism segment represented 13% of total international visitors, 20% of total international visitor nights and 19% of total international tourism expenditure.

International Indigenous tourism visitors declined in 2010 (down 2.9% on 2009), the fifth successive year of decrease. The proportion of international visitors who participated in Indigenous tourism activities

## Key findings

In 2010:

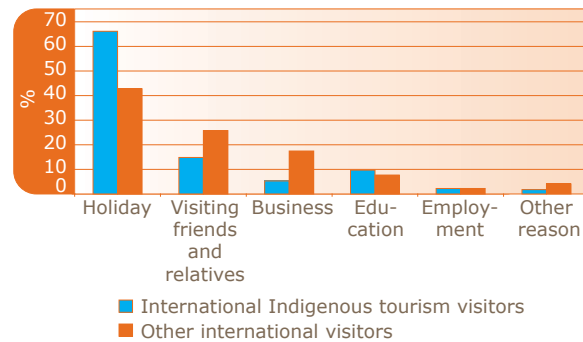
- international and domestic Indigenous tourism visitors spent a total of \$3.8 billion in Australia<sup>1</sup>
- there were 689,000 international Indigenous tourism visitors, who spent a total of 38 million nights in Australia, and a total of \$3.3 billion
- the international Indigenous tourism segment represented 13% of total international visitors, 20% of total international visitor nights and 19% of total international tourism expenditure
- international Indigenous tourism visitors were less likely than other international visitors to spend nights in the capital cities and the Gold Coast (69% compared to 81%), and more likely to spend nights in regional areas than other visitors (31% compared to 19%)
- there were 306,000 domestic overnight Indigenous tourism trips, which generated 2.5 million visitor nights and \$490 million in expenditure

fell from 17% in 2006 to 13% in 2010. There has been a corresponding fall in the total nights spent in Australia for international Indigenous tourism visitors from 41.7 million nights in 2006 to 37.5 million nights in 2010 (down 2.6% per year on average).

### Why did they travel?

In 2010, international Indigenous tourism visitors were more likely to travel for the purpose of *holiday* (66%) compared with other international visitors (43%), but were less likely than other visitors to travel for purposes such as *visiting friends and relatives* (15% compared to 26%), and *business* (5% compared to 17%).

**Figure 2: International Indigenous tourism visitors and other international visitors, by travel purpose, 2010**



### How long did they stay and how much did they spend?

On average, Indigenous tourism visitors stay longer and spend more in total on their trip than other visitors, however, on average they spend slightly less per night. During 2010, international Indigenous tourism visitors spent \$4,800 per trip<sup>2</sup> compared to other visitors (\$3,006) and stayed 54 nights at an average of \$88 per night. This compares with other visitors who, on average, stayed for a shorter time in Australia (32 nights), but spent more per night (\$97).

### Who were they?

In 2010, international visitors from Europe comprised 46% of the total international Indigenous tourism market in Australia.

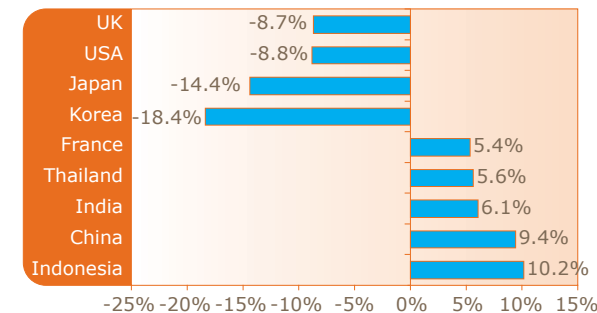
However, this segment has declined by 4.9% on average for each year over the 2006–2010 period.

Visitors from Asia made up 28% of total international Indigenous tourism visitation in 2010, down 3.7% on average since 2006.

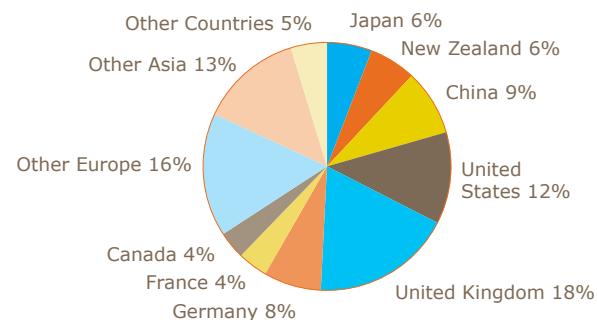
The four largest source countries of Indigenous tourism visitors were the United Kingdom (18%), the United States (12%), China (9%), and Germany (8%).

Since 2006, key markets showing 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. During the same period, significant declines in average annual growth were recorded for Korea (18%), Japan (14%), the United States (8.8%), and the United Kingdom (8.7%).

**Figure 3: International Indigenous tourism visitors' average annual growth, 2006–2010**



**Figure 4: International Indigenous tourism visitors, by country of residence, 2010**



### Where did they go?

In 2010, international Indigenous tourism visitors were less likely than other visitors to spend nights in the capital cities and the Gold Coast (69% compared to 81%), and more likely to spend nights in regional areas than other visitors (31% compared to 19%).

Among regional areas, Kakadu had the highest proportion of international Indigenous tourism visitor nights (83%) in a tourism region, followed by Petermann (77%), and the Tablelands (NT) (73%). Other regions in the Northern Territory with a larger proportion of international Indigenous tourism visitor nights were Alice Springs (66%) and Arnhem (53%). The South Australian tourism regions of Riverland and Flinders Ranges recorded a high proportion of international Indigenous tourism visitor nights (69% and 65% respectively).

### Where did they stay?

During 2010, international Indigenous tourism visitors were over three times more likely than other visitors to stay in *backpacker/hostel accommodation* (16% of nights compared to 5%). They were also almost four times as likely as other visitors to stay in a *caravan or commercial camping ground* (4.2% compared to 1.1%), and less likely than other visitors to stay in the *home of a friend or relative* (20% of nights compared to 30% of nights).

International Indigenous tourism visitors stayed in a range of accommodation facilities during their trip to Australia, including *rented house/apartment/unit/flat* (33% of nights), *home of a friend or relative* (20% of nights), *backpacker/hostel* (16% of nights), *hotel/resort/motel/motor inn* (12% of nights).

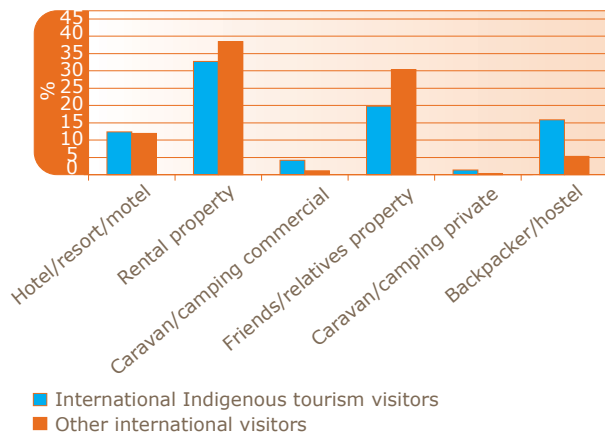
### How did they travel?

The number of international Indigenous tourism visitors arriving on a travel package rose slightly (by almost 1,000) to 192,000 in 2010. Those on a package tour represented 28% of all international Indigenous tourism visitors in 2010, up from 27% in 2009.

<sup>1</sup> TRA IVS and NVS expenditure (excludes spending on international pre-paid airfare and packages, and motor vehicles). Expenditure is for the entire trip.

<sup>2</sup> TRA IVS expenditure per trip (excludes airfares).

**Figure 5: Accommodation used by international Indigenous tourism visitors and other international visitors, 2010**



International Indigenous tourism visitors from Japan and China were more likely than those from other countries to arrive on a travel package (73% and 63% respectively).

China had the highest number of Indigenous tourism visitors arriving on a package at 37,000 in 2010, followed by Japan (30,000), the United Kingdom (25,000) and the United States (21,000).

### Domestic visitors

#### What are the recent visitor trends?

During 2010, there were 306,000 domestic overnight Indigenous tourism trips, which generated 2.5 million visitor nights and \$490 million in expenditure.<sup>3</sup> This was a decline of 17%, 19% and 23% respectively on 2009. Since 2006, domestic overnight Indigenous tourism has decreased on average each year by 19% in overnight trips and 23% in visitor nights, while total expenditure has decreased on average each year by 21%. Domestic overnight Indigenous tourism has registered a much stronger decline than the total domestic market for the same period.

#### Why did they travel?

During 2010, domestic overnight Indigenous tourism visitors were more likely to travel for the

<sup>3</sup> TRA NVS expenditure per trip (excludes motor vehicles).

**Table 2 International Indigenous tourism visitors on a travel package, 2010**

Country	Travel package ('000)	Non travel package ('000)	Total ('000)	Travel package visitors as a share of total Indigenous visitors (%)
Japan	30	11	41	73
China	37	22	59	63
Other Asia	17	74	91	19
United Kingdom	25	101	126	20
Germany	12	41	53	22
Other Europe	38	100	138	27
United States	21	60	82	26
New Zealand	6	35	41	14
Other countries	6	51	57	10
Total	192	497	689	28

purpose of *holiday or leisure* (74% of trips) than other visitors (44% of trips), but were less likely than other visitors to travel for other purposes including *visiting friends or relatives* (11% compared to 33%) and *business* (11% of trips compared to 19% of trips).

#### How long did they stay and how much did they spend?

Domestic overnight Indigenous tourism visitors spent \$490 million on their trips in 2010, excluding expenditure on motor vehicles (down from \$640 million in 2009). They stayed an average of 8 nights and spent \$1,604 per trip (\$194 per night). This was higher than other domestic overnight visitors, who stayed an average of 4 nights, and spent \$631 per trip (\$165 per night).

#### Who were they?

During 2010, the highest proportion of domestic overnight Indigenous tourism visits were made by *adult couples* (28%), *friends or relatives travelling together without children* (25%), and *family groups* (23%).

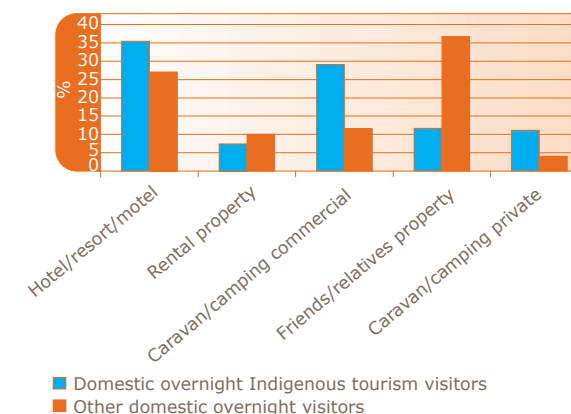
#### Where did they stay?

During 2010, domestic overnight Indigenous tourism visitors spent almost two and a half times more nights in *commercial caravan or camping grounds* compared to other domestic

visitors (29% compared to 12%). Almost three times as many domestic overnight Indigenous tourism visitor nights were spent in a *caravan or camping area near a road or on private property* (11% compared to 4%).

The highest proportion of domestic overnight Indigenous tourism nights were spent in a *hotel, resort, motel, motor inn* (35% of nights), followed by *caravan park or commercial camping ground* (29% of nights), *home of a friend or relative* (12% of nights), *rented house/apartment/unit/flat* (7.4% of nights) and *caravan or camping near road or on private property* (11% of nights).

**Figure 6: Domestic overnight Indigenous tourism visitors and other domestic overnight visitors, accommodation, 2010**



### Key findings cont.

- almost two and a half times as many domestic overnight Indigenous tourism nights were spent in a *caravan or commercial camping ground* compared to other domestic overnight visitors (29% compared to 12%)
- on average, international and domestic overnight Indigenous tourism visitors stayed longer and spent more per trip than other visitors
- the number of international Indigenous tourism visitors declined 2.9% (compared to 2009), while the number of domestic overnight trips declined by almost 17%
- the number of international and domestic overnight Indigenous tourism visitors have decreased sharply over the 2007–2010 period (see Figure 1)

**Table 3 Activities by international and domestic overnight Indigenous tourism visitors, 2010**

	International %	Domestic overnight %
See Aboriginal art, craft or cultural display	41	51
Visit an Aboriginal gallery	34	29
Visit an Aboriginal cultural centre	29	24
Attend an Aboriginal dance or theatre performance	26	9.5
Purchase Aboriginal art/craft or souvenirs	24	7.9
See an Aboriginal site or community	20	27
Some other interaction with Aboriginal people	17	19
Go on a tour with an Aboriginal guide	8	7.4
Attend an Aboriginal festival	2.9	np*
Stay in Aboriginal accommodation	1.6	4

**Supplementary data: Indigenous tourism activities and experiences**

Supplementary questions on experiences sought by Indigenous tourism visitors were included in the 2010 *International Visitor Survey* and *National Visitor Survey*.

The most commonly reported activities for both international and domestic overnight Indigenous tourism visitors were *see an Aboriginal art/craft or cultural display*; *visit an Aboriginal gallery* and *visit an Aboriginal cultural centre* (see Table 3).

The most commonly reported learning experiences among international Indigenous tourism visitors in 2010 were *Aboriginal art/craft* (59%), *Aboriginal music* (51%), and *Aboriginal weapons* (44%). Among domestic overnight Indigenous tourism visitors, the most common

**Table 4 International and domestic overnight Indigenous tourism visitors, learning experiences, 2010**

	International %	Domestic overnight %
Art/craft	59	64
Music	51	34
Weapons	44	31
Rock art/carvings	36	37
Hunting and gathering	29	39
Dancing/performance	29	21
Dreamtime	28	38
Bush tucker	24	34

Indigenous learning experiences were *Aboriginal art/craft* (64%), *hunting and gathering* (39%), and *dreamtime* (38%) (see Table 4).

**Conclusion**

Indigenous tourism is an important inbound segment, but it has declined in recent years.

Domestic overnight Indigenous tourism represents a small segment of total domestic tourism, but it is also declining.

Indigenous tourism is a more important segment in some states and regions than others.

Information on the supply of Indigenous tourism product is largely unavailable. As part of a coordinated research effort, TRA and the Tourism Research Advisory Board<sup>4</sup> are scoping out currently available and new data sources for delivering better Indigenous tourism-related supply statistics.

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Image: Wula Guda Nyinda Aboriginal Cultural Walks, Shark Bay, WA

Courtesy of Tourism Australia

**Indigenous Tourism Development Working Group**

The Indigenous Tourism Development Working Group examines ways to improve the quality and quantity of Australia's Indigenous tourism product offering, and to maximise the participation of Indigenous Australians in the tourism industry.

The Working Group has conducted a number of pilots in regional areas to train Indigenous school leavers and bring them together with potential employers. These programs have been successful in placing young Indigenous people into permanent employment in tourism.

The Working Group is also supporting the establishment of a training academy at Ayers Rock Resort to develop Indigenous business and entrepreneurial skills. The Working Group is initiating other mechanisms to foster such commercial arrangements between tourism entrepreneurs.

The Working Group is also exploring ways to facilitate business skills enhancement—including supporting mainstream tourism businesses—to assist Indigenous tourism providers in their integration into established tourism marketing and supply chains.

**Data sources**

Tourism Research Australia (TRA) International Visitor Survey (IVS) and National Visitor Survey (NVS) unpublished data.

**Notes**

All estimates refer to persons over the age of 15 years

\*np - not published

**Recommended sources for further information on the Indigenous tourism industry**

- Department of Resources, Energy and Tourism (RET) 2011, *Programs and resources to aid Indigenous Tourism Development*
- Tourism Forecasting Committee 2011, *Forecasts 2011, Issue 1*
- TRA 2010, *Indigenous Tourism in Australia - Profiling the Domestic Market*
- Tourism Australia/RET 2010, *Selling Indigenous Tourism Experiences*
- Tourism Australia/STOs 2009, *The National Indigenous Tourism Product Manual*
- Tourism Australia's Indigenous tourism portal ([www.indigenoustourism.australia.com](http://www.indigenoustourism.australia.com))
- Australian Bureau of Statistics, *Indigenous people*
- Department of Education, Employment and Workplace Relations, *Indigenous pages*

In addition to the estimates in this snapshot, there is a wide range of unpublished data on Indigenous tourism visitors in Australia available on request – please email [tourism.research@ret.gov.au](mailto:tourism.research@ret.gov.au)



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<sup>4</sup> For information on the Tourism Research Advisory Board, go to <http://www.ret.gov.au/tourism/nlts/workinggrps/research/Pages/default.aspx>, and the National Tourism Research Agenda, go to <http://www.ret.gov.au/tourism/Documents/tmc/TRAB-National-Tourism-Research-Agenda.pdf>