



INDIGENOUS TOURISM

Indigenous Tourism encompasses tourism product that provides consenting contact with Aboriginal people, culture or land. The term is also applied to businesses that are either Aboriginal owned or part owned or that employ Aboriginal people. Indigenous Tourism encompasses all tourism product opportunities – Cultural Heritage, Adventure, Rural, Leisure, Educational, Arts and Crafts and provision of tourism services.

Indigenous Tourism is a specialist market in Australia, with only about 200 operators currently active in the market. The current interest in Indigenous Tourism is primarily centred within the International market.

In 2002, Tourism Queensland conducted a review of current research to gain a better understanding of the Indigenous Tourism market. Specific objectives of conducting the review were to:

- Develop a market profile of the Indigenous Tourism sector in Queensland;
- Provide information on what people are looking for in an Indigenous Tourism experience;
- Identify any product gaps; and
- Identify core issues that confront both the operation and development of tourism businesses targeting the Indigenous market

Market Insight

- People most likely to be attracted to indigenous tourism include tourists from overseas, people interested in learning about Aboriginal Culture, young people, adventurous people, and those interested in the process of reconciliation.¹
- Indigenous Tourism is more popular amongst international visitors to Australia than amongst domestic travellers, with international visitors currently leading the development of Australian indigenous tourism.²
- Overseas visitors are increasingly seeking to add an indigenous cultural experience to their holiday itineraries, and are increasingly expecting to meet indigenous Australians during their Australian holiday.²
- The United States of America, the United Kingdom, Europe and Japan are the largest international source markets for Indigenous Tourism.³
- In 1999, over 5% (approx. 200,000) of international visitors visited an Aboriginal site/community and 11% (470,000) of international visitors experienced Aboriginal arts and crafts or cultural displays during their stay in Australia. Some of these visitors participated in both of these experiences, making a total of 538,000 international visitors that participated in Indigenous Tourism.⁴
- Purchases of Aboriginal art and souvenirs by international visitors were worth \$67 million in 1996. This is an increase from the estimated \$46 million in 1993.⁵
- Domestic travellers indicate only moderate interest in participating in Indigenous Tourism experiences.¹
- The Northern Territory leads the states in terms of Indigenous Tourism for the domestic market. Thirty-nine percent (39%) of all aboriginal art/culture/cultural display experiences and 43% of all visits to an aboriginal community/site for domestic visitors occur in the Northern Territory.⁶
- Queensland does not perform well in the domestic market, with only 1% of visitors to the state participating in Indigenous Tourism experiences.⁶
- Domestic tourists do not tend to identify Aboriginal people with Queensland's coastal environment. Many believe that 'real' Aboriginal experiences can only be found in remote areas like central Australia and the Kimberleys.⁷
- Queensland leads the way amongst international visitors, with 26% of all aboriginal art/culture/cultural display experiences and 24% of all visits to an aboriginal community/site for international visitors occurring in Queensland.⁸
- Visitors indicate that they would most likely seek out day tours or short tours and incorporate an indigenous tourism element into a broader holiday.¹
- Being made aware of the ability to take Indigenous tours prior to arriving in the destination and awareness of the benefits increases the likelihood of uptake.¹
- As 80% of Australia's tourism market is domestic, indigenous tourism operators need to attract a greater share of this market to experience real growth.⁷

Interstate Indigenous Culture Market Year Ending December 2001

	NSW	QLD	VIC	ACT	SA	WA	TAS	NT
Total interstate overnight visitors	8,112,000	5,031,000	5,085,000	2,094,000	1,855,000	831,000	658,000	540,000
Experienced aboriginal art/culture or cultural displays								
Visitor numbers	30,000	36,000	18,000	15,000	18,000	26,000	1,000	91,000
State share of market	13%	15%	8%	6%	8%	11%	<1%	39%
% of total visitors to State	<1%	1%	<1%	1%	1%	3%	<1%	17%
Visited an aboriginal community/site								
Visitor numbers	33,000 88,000	29,000	13,000	-	18,000	24,000	-	
State share of market	16%	14%	6%	-	9%	12%	-	43%
% of total visitors to State	<1%	1%	<1%	-	1%	3%	-	16%

(Source: Bureau of Tourism Research - National Visitor Survey, December 2001).

International Indigenous Culture Market 1999

	NSW	QLD	VIC	ACT	SA	WA	TAS	NT
Total international visitors	2,363,000	1,950,000	1,060,000	181,000	317,000	537,000	96,000	364,000
Experienced aboriginal art/culture or cultural displays								
Visitor numbers	302,000	317,000	174,000	36,000	90,000	92,000	22,000	184,000
State share of market	25%	26%	14%	3%	7%	8%	2%	15%
% of total visitors to State	13%	16%	16%	20%	28%	17%	23%	51%
Visited an aboriginal community/site								
Visitor numbers	139,000	151,000	81,000	21,000	56,000	44,000	11,000	118,000
State share of market	22%	24%	13%	4%	9%	7%	2%	19%
% of total visitors to State	6%	8%	8%	12%	18%	8%	11%	33%

(Source: Bureau of Tourism Research - International Visitor Survey, 1999).

Please note that all information pertaining to type of experience sought, activities, accommodation and length of experience pertains to Australian travellers only. No research is currently available on this for the international market.

Type of Experience Sought

Visiting natural landscapes with rare and impressive scenery is an important element of an Aboriginal holiday experience. To a lesser extent, the benefit of learning about Aboriginal mythology and legend is an expected outcome of an Aboriginal holiday experience. Native food and traditional culture are, comparatively speaking, less important aspects of an Aboriginal holiday experience.¹

Activities⁹

Guided walks incorporating indigenous elements are the most appealing sort of indigenous experience for Australians. Travellers are most interested in guided walks and tours in exceptional and rare scenic areas. Having an Aboriginal guide is seen as "adding value" to the experience, as these guides are perceived to be able to offer more local information, history and mythological stories about the significance of the location. A guided walk is considered to be an appropriate vehicle for incorporating Aboriginal cultural interests such as viewing cave or rock wall paintings, or being shown bush tucker or bush survival techniques. Bird or wildlife watching is also seen as an appropriate activity to incorporate into guided walks, although these activities are more appealing to the mature holidaymaker.

The more "stereotypical" activities such as **dance troupes, Art & Craft retailing and Art & Craft manufacturing** are less appealing to most Australian holidaymakers, being regarded as artificial and more suited to the international tourist. Art and craft manufacturing generates interest only if conducted using traditional methods. There is some interest in purchasing locally made art and craft if the items are authentic and different (not the familiar boomerangs and didgeridoos).

Other activities such as **horse trail riding, beach lazing, fishing and four wheel driving** are not considered to be consistent with the label "Aboriginal cultural experience". They are however all considered to be appealing activities and holidaymakers are happy to be led or serviced by Aboriginal people.

Accommodation Preferences⁹

Visitors conducting or seeking indigenous tourism consider a range of accommodation options to be appropriate for an Aboriginal Tourism product, with differing levels of appeal for the various options.

Older holidaymakers are likely to have accommodation already arranged in town in either motels or caravan sites and would generally prefer to return to their base the same night.

Camping mainly appeals to males and/or the young adventurer type who rate an 'authentic', 'back to nature' experience as highly appealing. Green and cool looking locations appeal more than dry and dusty looking campsites. For those interested in camping type options, most would expect to pitch in to help with setting up and dismantling the campsite.

Rainforest log cabins are appealing to most. The expectation is that the facilities within would be simple, and such luxuries as the telephone and television would not be included.

Resort style lodge accommodation is suitable for a wide range of holidaymakers, particularly those with low interest in camping type accommodation options. For those more interested in an authentic outback experience, they envisage that they could use such accommodation as a starting point, perhaps staying there the night before their tour commenced.

Research conducted in the Northern Territory indicates that most indigenous tourism visitors stay in a hotel/motel (51%) or caravan park (29%).

Information Sources

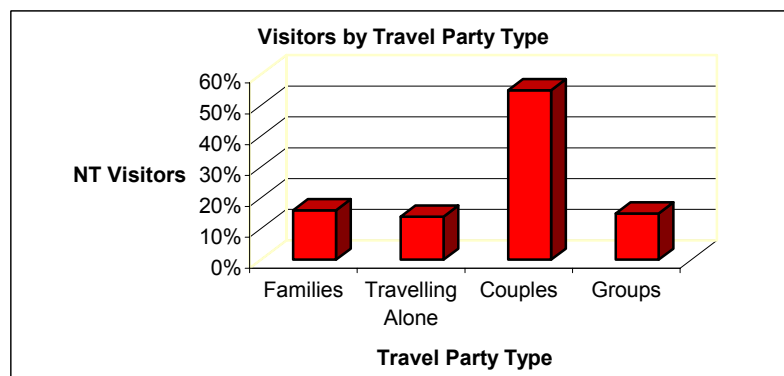
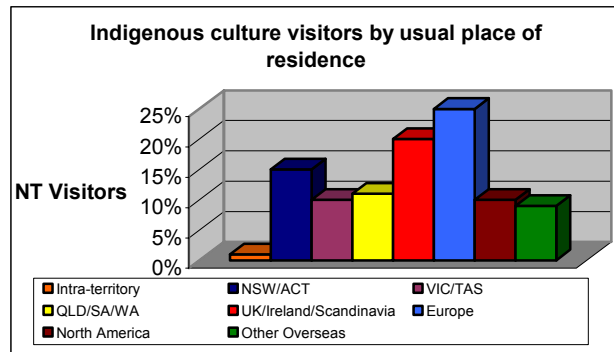
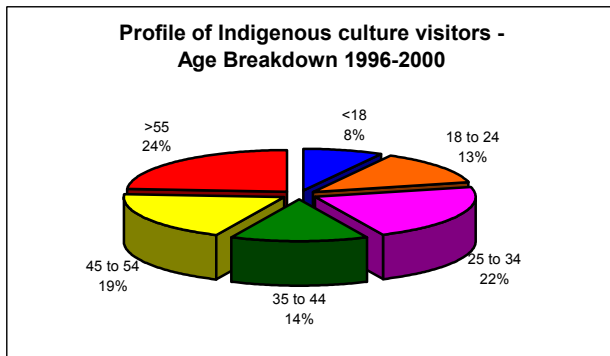
Indigenous culture visitors are more likely to look for information before leaving home than non-indigenous culture visitors. It should be noted that a large proportion of indigenous culture visitors are from overseas, so information usage patterns tend to follow those of international visitors, with relatively high usage of magazines, books and travel agents.¹⁰

Many internationals who want an indigenous tourism experience look for information before they leave home. While currently the main sources remain travel guide books and brochures, a significant 13% seek information on the availability of indigenous experiences from the Internet. Those from Germany and North America are particularly likely to use the Internet.¹¹

Length of experience¹

It is most likely that an Aboriginal experience tour or holiday would be taken as a 'side trip' in the context of a touring holiday (eg: a driving holiday where a number of destinations are visited). Older holidaymakers on touring holidays are likely to be most interested in a short Aboriginal Tourism experience lasting a half-day or full day. Young single or couple travellers appear to be most interested in taking longer tours in order to absorb or learn some of the culture. The likely time this group would expect to spend on tour ranges from two to four days.

Demographic Profile¹⁰



Barriers⁸

- Lack of time and distance to travel to participate in indigenous tourism experiences are major barriers, suggesting an opportunity to promote activities located closer to capital cities.¹¹
- Many Australians believe that they have a good grasp of Aboriginal culture and feel that they would not learn anything from an indigenous tourism experience. In addition, many indigenous tourism experiences are regarded as being artificial and more suited to the international tourist.⁹
- In many areas there are obstacles to involving indigenous people in interpreting the natural environment. These include an unavailability of permits in areas subject to limited commercial opportunities and uncertainty on the part of ecotourist operators about how to involve indigenous people.²
- It is generally recognised that there are particular problems in developing tourism products in more remote areas, which are often the areas with the strongest cultural resources.²

Opportunities

- Significantly, research findings indicate that interest in Aboriginal Tourism is not being fully met. Over a third of those who experienced Aboriginal culture said they would have liked to have had additional cultural experiences including visiting Aboriginal Communities, meeting and talking to Aboriginal people, seeing cave paintings and rock art sites, or watching a performance.¹¹
- It is recognised that the industry as a whole will benefit from increased product diversity. However, it will be generally more feasible to develop indigenous cultural tourism where an enterprise can:
 - Cater to places where tourists already visit
 - Be linked to an area of spectacular environmental quality
 - Be linked to existing transport and accommodation infrastructure, or
 - Be linked to other destinations as part of a special interest package.²

- Cultural tours dominate the current product range. These require relatively low levels of capital commitment, and entry into the market is not difficult. This is also an area where Aboriginal and Torres Strait Islander people have a particular contribution to make, which gives them a competitive edge over other tour operators.²
- There is a particular interest in traditional knowledge about native plants and their use as bushfoods and in traditional medicine. There may be problems in presenting this information where it is potentially commercially valuable to Indigenous people (via plant copyright) or where there are traditional restrictions on sharing of information. Nonetheless, there is much information that can be presented, and tourists appreciate this being provided by Aboriginal or Torres Strait Islander people themselves.²
- There is an increasing interest by tourists in ecotourism and nature-based tourism. Indigenous tourism can use this opportunity to strengthen the inclusion of Indigenous cultural interpretation, as Aboriginal and Torres Strait Islander culture is strongly based in the physical environment. Traditional understanding of the landscape and its features can be explained to tourists in a way which adds value to their experience.¹⁰

Marketing Tools

- Aboriginal and Torres Strait Islander people feel strongly that promotion of their cultures needs to acknowledge distinctive regional differences. To date, much promotion has used Indigenous themes, which portray a single Indigenous culture – one where boomerangs, didgeridoos, dot or X-ray style painting and stereo typed imagery are dominant.²
- Many Australians believe they have a good understanding of the Aboriginal culture and they do not expect to experience anything ‘new’ or ‘different’ from a holiday described in this way. Australians respond better to Aboriginal tourism when described using phrases such as: ‘Bush experiences’; ‘Outback tours’; ‘Survival trek’; or ‘Natural landscape tours guided by people indigenous to the area’. A range of new and unexpected experiences is envisaged and the propensity to consider such a holiday increases.⁹
- Care needs to be taken regarding the issues of cultural property, copyright, intellectual property and authenticity. There have been a number of by well publicised “rip offs” in recent years which have disadvantaged Aboriginal and Torres Strait Islander people. There is now probably a greater awareness of these issues within indigenous communities than within the mainstream tourism industry.²

Other Considerations

- Cultural tourism is based on the strength of local culture and needs to be have reinvestment from tourism in order to maintain cultural resources. There is a parallel with nature-based tourism, where it is generally accepted that some of the returns from tourism need to be reinvested in maintaining the value of the natural environment.²
- It is important to ensure indigenous peoples have direct participation in the planning, implementation, and regulation of tourism activities that affect them. The commercialisation of indigenous culture can lead to social degradation and growing tourist numbers can lead to increased pollution and environmental damage, depleting the rich biodiversity of their natural resources. Unless consultative measures and benefit-sharing mechanisms are put in place, indigenous peoples will continue to be mere cogs in the wheel of the tourism industry.¹²
- Within National Parks and other conservation areas, training and employment of Aboriginal and Torres Strait Islander people in interpretation has been funded through government programs. It is desirable that initiatives of this sort continue in the future. This will become increasingly significant to Aboriginal and Torres Strait Islander people as they gain title to lands with conservation significance.²
- Permits for indigenous tourist sites are issued through the Land Councils who act on behalf of traditional owners. The permit system is designed to help protect the privacy of Aboriginal Communities, preserve Aboriginal culture, safeguard the natural environment and promote visitor safety.¹³

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- ¹ Special Interest Unit New Product Research Report, MCR, June 2000
² www.atsic.gov.au - March 2002
³ International Visitors Survey, Bureau of Tourism Research, 1998 and 1999
⁴ Participation in Aboriginal Tourism by International Visitors in 1999, Tourism Research, South Australian Tourism Commission
⁵ Commercial Value of Indigenous Cultural and Intellectual Property – www.ataust.org.au - April 2002
⁶ National Visitors Survey, Bureau of Tourism Research, 2001
⁷ www.tq.com.au - March 2002
⁸ International Visitors Survey, Bureau of Tourism Research, 1999
⁹ Indigenous Tourism Research Report, MCR, April 2000.
¹⁰ Aboriginal Art and Culture Fact Sheet 2000, Northern Territory Tourist Commission
¹¹ New research Explores Aboriginal Tourism, South Australian Tourism Commission, Winter 2000
¹² www.twinside.org.sg/title/chavez-cn.htm - April 2002
¹³ www.ataust.org.au/Permits.htm - March 2002

Further Information

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