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

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.

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

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

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\(^1\)
- 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

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\(^2\) 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).

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.

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 visitor nights 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 4: International Indigenous tourism visitors’ average annual growth, 2006–2010

Figure 3: International Indigenous tourism visitors, by country of residence, 2010

Who were they?

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

1 TRA IVS and NVS expenditure (excludes spending on international pre-paid airfare and packages, and motor vehicles). Expenditure is for the entire trip.
2 TRA IVS expenditure per trip (excludes airfares).
Travel package ('000)  
Total ('000)  
21  
26  
22  
91  
11  
17  
101  
63  
41  
on average,  
19  
25  
192  
the number of  
20  
12  
6  
60  
22  
41  
14  
73  
27  
497  
38  
689  
6  
37  
82  
35  
10  
the number of  
53  
almost two and a  
126  
74  
30  
138  
57  
59  
20  
23  
visitors were more likely to travel for the  
During 2010, domestic overnight Indigenous tourism visits were made by adult couples (28%), friends or relatives travelling together without children (25%), and family groups (23%).

**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).

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

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

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

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3 TRAVS expenditure per trip (excludes motor vehicles).
Table 3 Activities by international and domestic overnight Indigenous tourism visitors, 2010

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

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 are scouring out currently available and new data sources for delivering better Indigenous tourism-related supply statistics.

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

<table>
<thead>
<tr>
<th>Experience</th>
<th>International %</th>
<th>Domestic overnight %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Art/craft</td>
<td>59</td>
<td>64</td>
</tr>
<tr>
<td>Music</td>
<td>51</td>
<td>34</td>
</tr>
<tr>
<td>Weapons</td>
<td>44</td>
<td>31</td>
</tr>
<tr>
<td>Rock art/carvings</td>
<td>36</td>
<td>37</td>
</tr>
<tr>
<td>Hunting and gathering</td>
<td>29</td>
<td>39</td>
</tr>
<tr>
<td>Dancing/performance</td>
<td>29</td>
<td>21</td>
</tr>
<tr>
<td>Dreamtime</td>
<td>28</td>
<td>38</td>
</tr>
<tr>
<td>Bush tucker</td>
<td>24</td>
<td>34</td>
</tr>
</tbody>
</table>

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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.

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’s Indigenous tourism portal (www.indigenoustourismaustralia.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


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