

Elsevier Editorial System(tm) for Tourism Management
Manuscript Draft

Manuscript Number: JTMA-D-14-00547R1

Title: Indigenous Tourism in Australia: Time for a Reality Check

Article Type: Research Paper

Keywords: Indigenous tourism, visitor demand, Attrition Curve of Tourist Demand

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Abstract: Indigenous tourism is positioned as an integral part of Australia's tourism product offering yet participation in Indigenous tourism experiences by both international and domestic markets is in decline. The demand for, and interest in, Australia's indigenous culture that has been consistently portrayed by Australian government agencies has not translated into sustainable visitor flows for many indigenous tourism businesses. Therefore, the aim of this research was to explore visitor demand for indigenous tourism through interviews with 1357 international and domestic tourists. To overcome some of the limitations of previous indigenous tourism studies, this study used the 'Attrition Curve of Tourist Demand' to determine if insights could be gained by analysing the consumer decision making process (awareness, preferences and intentions). The results of the research show that while there has been much progress in the development of this niche tourism sector, there is low awareness, preference and intention to participate in indigenous tourism experiences in Australia.

Dear Professor Ryan,

Please find attached our revised submission 'Indigenous Tourism in Australia: Time for a Reality Check'.

We have addressed and/or responded to each of the reviewers comments as detailed in the attached 'Response to Reviewers'.

We thank you for taking the time to consider our submission and as requested in your previous email we have checked the references that accompany the paper.

Thanks and best regards,

Dr Lisa Ruhanen, Dr Michelle Whitford and Dr Char-lee McLennan

Response to Reviewers

Reviewer 1	
Generally speaking the paper is fine. The literature review is broad and comprehensive. The paper is easy to read and understand. The paper could be better if the author improve some issues listed in the following.	No changes.
I would suggest the authors think about the properness of using attrition curve. Attrition curve is not a common method. Readers without relative academic background may find it hard to grasp the meaning of attrition curve. If the authors want to keep the section of attrition curve, they should explain the attrition curve more clearly. More specifically, the authors should provide clear attrition curve measurement points as listed in Table 4.6 in Tourism White Paper Evaluation: Final Report (Department of Resources Energy & Tourism, 2008).	<p>We agree that the attrition curve has not being widely applied in the tourism literature. The attrition curve was deemed most appropriate for this particular study as previous studies have used destination choice sets (i.e. Woodside & Lysonski, 1989; Crompton & Ankomah, 1993) whereas we sought to explore experience (as opposed to destination) choice sets.</p> <p>We believe that this point of differentiation is in itself, a further contribution of this paper by extending the use of choice sets from destinations to experiences.</p> <p>However, we note the reviewer's suggestion that further explanation of the attrition curve is needed and also the suggestion of using the measurement points from the Tourism White Paper Evaluation Report. This has been included in the literature review attrition curve section (page 6, lines 262-270):</p> <p><i>"The attrition curve has five measurement points (Figure 1) including: destination awareness (percentage of people who have heard about Australia as a holiday destination); preference (percentage of people considering visiting Australia in the next three to four years); intention (percentage of people seriously considering going to Australia in the next 12 months); booking (percentage of people currently booked to travel to Australia); and, visited (percentage of people who have visited Australia in the past 12 months) (Department of Resources Energy and Tourism, 2008; Morrison, 2005)".</i></p> <p>The discussion of the attrition curve now constitutes two pages within the literature review section and approximately one page within the methods section. We believe that this is now a detailed review and justification of the attrition curve which will orient readers who do not have a background in choice sets.</p>
I would suggest the authors provide reasons for using questionnaire in Chinese to conduct interview. Is China the most important visitor	The survey was provided in both English and Chinese as we specifically sought a sample of Chinese respondents as part of the aims of the

<p>source country for Australia? Do Chinese visitors decline English interview more likely? Is Chinese visitors' English skill worse than that of visitors from other countries? Why do the authors not separate interview results of Chinese from visitors from other countries?</p>	<p>broader research project. Funding for the study was provided by two government agencies; Indigenous Business Australia and Tourism Australia. Tourism Australia was particularly interested in understanding the Chinese markets' demand for Australia's indigenous experiences given the importance of the Chinese market to Australia. For instance at the end of 2012 China became Australia's second largest inbound market in terms of visitor numbers and is also the fastest growing inbound tourism market in terms of visitor value; now the highest yielding market ahead of the United Kingdom, New Zealand and the United States. In the longer term, China is expected to be one of Australia's major inbound visitor markets with estimates of inbound arrivals continuing to increase at a compound annual rate of 11%, potentially reaching between A\$7 and \$9 billion in total expenditure by 2020.</p> <p>The decision to provide the survey in both English and Chinese was based on advice from our funding partners that the Chinese respondents may not have sufficient English skills to confidently complete such a detailed survey. For instance in a recent report from Tourism Research Australia (2014) 'Chinese Satisfaction Survey' it is noted that "highlighting the relevance of the availability of Chinese language services, 77% of Chinese visitors reported they could not speak English well or at all. A slightly lower proportion stated they were unable to read English well or at all (70%)" (p.9). To accommodate for this, the survey was provided in Chinese and at all times two members of the data collection team were fluent in Mandarin. Despite the findings of Tourism Australia and the availability of the Chinese language surveys only 8% of the China market respondents completed the Chinese version of the survey.</p> <p>The Chinese results were not presented separately from other international visitor respondents as it was not the objective of this paper to explore the differences between the different international markets. Further given that the final Chinese sample achieved was only 14% of the total sample it would not warrant separate discussion under the objectives of this paper.</p>
<p>Some Chinese translations cause</p>	<p>The authors thank the reviewer for identifying</p>

<p>misunderstanding and some are inconsistent. For example, the translations of "undertaken" in question 11 and question 14 are different, but they should be the same. The first item of question 18 is "limited budget" but the meaning of correspondence Chinese contents is "limited counting ability". The Chinese version of second item of question 24 is "no value" or "worthlessness", but the English version of that item is "value for money". Besides, the translations of aboriginal are totally different in simplified Chinese and in traditional Chinese. Translation of aboriginal in question 23 is of traditional Chinese style. Translation of aboriginal in first item of question 24 is of simplified Chinese style.</p>	<p>these translation inconsistencies. The survey was professionally translated and checked by colleagues so we are disappointed to learn that there were errors in the translation. To acknowledge this we have noted in the study limitations (page 9, lines 392-398): <i>“Third, the survey was conducted in both English and Chinese (to account for the funding partners requirements for a Chinese sample of international visitors) and post-data analysis small discrepancies were noted in the translation of several of the questions in the Chinese version of the survey which may have influenced how the respondents interpreted those questions. However, as the data was collected via interviews (as opposed to self-completed questionnaires) by bilingual data collectors, interpretation errors should have been negated”.</i></p>
Reviewer 2	
<p>In general a good article and in acceptable format. It could be better if post tourist behavior is also analyzed.</p>	<p>We agree that post behaviour perceptions of respondents would provide interesting insights and could contribute to studies previously undertaken (as outlined in the literature review). However, this particular study was limited to an investigation of visitor awareness, preferences and intention. The objective was to collect a large data set (as per the funding partners requirements) and given the difficulties in collecting reliable and robust post-visit samples, a decision was made to exclude the visitation (behavioural variable) from this particular study. This has been added to the limitations of the study (page 9, lines 398-399) in the revised submission. However, we recognise the value of the suggestion of the reviewer and as such is also noted as a future area of research within the limitations/ delimitations also (page 9, lines 399-401): <i>“The study was delimited to exploring only the awareness, preferences and intention aspects of the attrition curve. Future research could apply the attrition curve and extend to incorporate the behavioural variable (visitation)”.</i></p>
Reviewer 4	
<p>Thank you for a timely research report linking public sector activity in tourism with indigenous issues.</p>	<p>No changes.</p>

Tourism Research Australia (2014). *Chinese Satisfaction Survey*. Available at:
http://www.tra.gov.au/documents/Chinese_Satisfaction_Survey

Indigenous Tourism in Australia: Time for a Reality Check

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Highlights

- First national indigenous study with 1357 international and domestic tourists
- Attrition Curve of Tourist Demand applied to overcome bias in indigenous surveys
- Low awareness, preference and intentions to participate in indigenous tourism
- Disconnect between government objectives and the reality of tourist demand

1 **Indigenous Tourism in Australia: Time for a Reality Check**

2
3
4 Abstract

5 Indigenous tourism is positioned as an integral part of Australia’s tourism product offering
6 yet participation in Indigenous tourism experiences by both international and domestic
7 markets is in decline. The demand for, and interest in, Australia’s indigenous culture that has
8 been consistently portrayed by Australian government agencies has not translated into
9 sustainable visitor flows for many indigenous tourism businesses. Therefore, the aim of this
10 research was to explore visitor demand for indigenous tourism through interviews with 1357
11 international and domestic tourists. To overcome some of the limitations of previous
12 indigenous tourism studies, this study used the ‘Attrition Curve of Tourist Demand’ to
13 determine if insights could be gained by analysing the consumer decision making process
14 (awareness, preferences and intentions). The results of the research show that while there has
15 been much progress in the development of this niche tourism sector, there is low awareness,
16 preference and intention to participate in indigenous tourism experiences in Australia.

17
18 Keywords: Indigenous tourism, visitor demand, Attrition Curve of Tourist Demand
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51 1.0 Introduction

52 In Australia, indigenous culture has long been thought to have the potential to provide the
53 country's tourism industry with a key point of differentiation (Buultjens, Waller, Graham, &
54 Carson, 2005). Australia's amalgamation of tourism and indigenous culture was formalised
55 when the Australian Federal Government released the National Aboriginal and Torres Strait
56 Islander Tourism Strategy in 1997 and over the ensuing years, Australian states and
57 territories have been working towards "increasing indigenous participation in tourism,
58 particularly through employment, (to) help 'close the gap' of indigenous disadvantage and
59 help address labour shortages in the tourism sector, particularly in rural and regional
60 Australia" (Department of Resources Energy & Tourism, 2009, p. 10).

61
62 The interest in indigenous culture has led to the supply of a range of activities and
63 experiences which are often owned and/or managed by Australia's Aboriginal and Torres
64 Strait Islander peoples. While indigenous people involved in tourism generally have a
65 positive view of the industry and confidence in their products to exceed consumer
66 expectations (Jones Donald Strategy Partners 2009), there has been conflicting reports
67 pertaining to the success (or otherwise) of indigenous tourism in Australia (Buultjens & Gale,
68 2013; Buultjens, Gale, & White, 2010; Buultjens & White, 2008; Fuller, Buultjens, &
69 Cummings, 2005; Higgins-Desbiolles, Schmiechen, & Trevorow, 2010; Schmiechen &
70 Boyle, 2007; Tremblay & Wegner, 2009). Consecutive Australian governments, at Federal
71 and State levels, have consistently touted optimistic and favourable assessments of the
72 opportunities for Indigenous people due to tourism. For instance, the Australian government
73 claim that "tourism offers enormous potential to indigenous communities, both to create
74 sustainable jobs and employment and as a means to protect and nurture cultural and
75 environmental heritage" (Commonwealth of Australia, 2009).

76
77 Yet this reported demand has not transpired into visitor flows for many Australian
78 indigenous tourism businesses and so the impetus for this study was borne from a clear
79 divergence between the favourable and optimistic assertions of the Australian public
80 agencies and the realities of visitor flows for the indigenous tourism businesses. According to
81 one of the project stakeholders, "real demand for indigenous cultural tourism has not been
82 effectively demonstrated through existing research. In some studies of demand there has been
83 a tendency towards optimistic projections of the value of the indigenous cultural tourism
84 market" (Personal Communication, 2012). Similarly Tremblay and Wegner (2009) noted that
85 a lack of focused research has resulted in public sector strategies that have been developed
86 for growing indigenous tourism in Australia, are not underpinned and developed with explicit
87 empirical evidence but rather with assumptions (i.e., high interest or growing demand in
88 indigenous tourism). For instance, a current indigenous tourism strategy accepted that given
89 "the panel concluded that successful indigenous tourism industries in Rotorua, Hawaii and
90 other parts of the world, indicate there is a growing appetite for indigenous product"
91 (Yugambeh Museum, 2013, p. 6). Arguably comments that are indicative of the approach
92 that has been applied to indigenous tourism development in Australia where decisions are not
93 necessarily underpinned by a comprehensive understanding of visitor demand.

94
95 It is within this contextual scaffolding and in recognition of these research deficiencies and
96 anomalies, that this empirical research was instigated with the aim of delving into the 'real'
97 or actual visitor demand for Australia's indigenous tourism product through a research design
98 that specifically sought to elicit information not represented in previous studies of the market.
99 The objectives of the study were to: (1) model international and domestic visitor responses to
100 demand against an attrition curve approach (Department of Resources Energy & Tourism,

101 2008; Macfarlane & Jago, 2009; Morrison, 2005) to explore awareness, preferences and
102 intention for Australia's indigenous tourism products; and, (2) explore the associated demand
103 driven inhibitors to tourist participation in indigenous tourism in Australia.

104
105 Although there has been a range of site-specific or case study driven research undertaken on
106 indigenous tourism in Australia to date (e.g. Altman, 1993a, 1993b; Brereton et al., 2007;
107 Brim, 1993; Buultjens, Brereton, et al., 2010; Buultjens & Fuller, 2007; Buultjens & Gale,
108 2013; Buultjens, Gale, et al., 2010; Buultjens et al., 2005; Buultjens & White, 2008; Dyer,
109 Aberdeen, & Schuler, 2003; Finlayson & Altman, 2003; Fuller et al., 2005; Fuller &
110 Cummings, 2003; Hall, 2007; Higgins-Desbiolles, 2009; Higgins-Desbiolles et al., 2010;
111 Higgins-Desbiolles, Trevorrow, & Sparrow, 2014; Jones Donald Strategy Partners, 2009;
112 Mercer, 2005; Nielsen, Buultjens, & Gale, 2008; Pitcher, Van Oosterzee, & Palmer, 1999;
113 Ryan & Huyton, 2000, 2000a, 2002; Smith, Scherrer, & Dowling, 2009; Tremblay, 2007;
114 Tremblay & Wegner, 2009; Whitford, 2009; Whitford, Bell, & Watkins, 2001; Whitford &
115 Ruhanen, 2010; Zeppel, 2002), this research is significant as it is the first to undertake a
116 national study of indigenous tourism demand in Australia. It is also the first study to apply
117 the attrition curve methodology and visitor choice sets to investigate indigenous tourism. As
118 such, the research provides theoretical outcomes in terms of contributing to the traveller
119 choice literature through the application of the 'Attrition Curve of Tourist Demand' model.
120 Additionally, the practical implications of this study are significant for government and
121 industry operators as the methodology attempts to remove the bias limitations of previous
122 research and thus provides a realistic and frank exploration of indigenous tourism demand in
123 Australia.

124 125 1.1 Indigenous Tourism in Australia

126 Indigenous tourism can be defined as tourism activity in which indigenous people are
127 directly involved either through control and/or by having their culture serve as the essence of
128 the attraction (Butler & Hinch, 2007). In Australia and for the purpose of ascertaining visitor
129 demand, an indigenous tourism 'visitor' is defined as one who participates in at least one
130 indigenous tourism activity during their trip (i.e., experiencing indigenous art/craft or cultural
131 display; attending an indigenous performance). This participation may be a one-off activity
132 or a component of other tourism activities (Tourism Research Australia, 2008). The diverse
133 array of activities available for those visitors seeking an indigenous experience in Australia
134 include bushwalks, safaris, staying in indigenous owned/operated accommodation, going on
135 a tour with an indigenous guide, visiting an indigenous site or community, attending live
136 performances (e.g., dance, drama, music) and appreciating visual arts in State museums and
137 galleries or through commercial art and craft enterprises (Tourism Research Australia, 2011).

138
139 Indigenous tourism is considered one of the key Australian experiences which underpin the
140 country's global marketing activities and therefore, it is considered an important inbound
141 segment; "Australia's indigenous culture is a key point of differentiation in a highly
142 competitive international tourism market" (Tourism Research Australia, 2011, p. 1). Yet
143 despite its purported significance, the sector has continued to decline; indeed visitors in this
144 segment have declined for five successive years to 2010 (the last statistical data collection for
145 the market). The indigenous tourism segment reportedly comprises 13% of total international
146 visitors (down 3% on 2009), 20% of total international visitor nights and 19% of total
147 international tourism expenditure in 2010 (Tourism Research Australia, 2011). It is also
148 claimed that a significant proportion of domestic travellers are open to indigenous tourism
149 experiences (Tourism Research Australia, 2010), in fact claiming that two-thirds of domestic
150 tourism consumers have previously either considered, or actually taken part in indigenous

151 tourism activities. The domestic overnight indigenous tourism market accounted for 306,000
152 trips, 2.5 million visitor nights and \$490 million in expenditure in the same period. Such
153 figures represent declines of 17%, 19% and 23% respectively on 2009. Indeed, since 2006,
154 domestic overnight indigenous tourism has decreased on average each year by 19% in
155 overnight trips and 23% in visitor nights, while total expenditure has decreased on average
156 each year by 21%. Domestic overnight indigenous tourism has registered a much stronger
157 decline than the total domestic market for the same period (Tourism Research Australia,
158 2011).

159

160 Other empirical studies of indigenous tourism visitors in Australia have concluded that
161 participating in indigenous tourism is generally not a primary motivator to visit Australia
162 (Nielsen et al., 2008). Earlier research by Ryan and Huyton (2000, 2000a, 2002) also
163 investigated visitor interest in indigenous tourism in the Northern Territory and concluded
164 that both domestic and international tourists consistently ranked attractions based on
165 indigenous culture as being less attractive than other activities. They found that indigenous
166 tourism products are often seen as simply a component within a wider cultural and natural
167 context of the Australian tourism experience and that for approximately a third of the visitors
168 to the Northern Territory, the indigenous tourism experiences were not a major or 'must see'
169 attraction. Research focused on domestic demand for indigenous tourism has found low
170 appeal amongst the market, relative to other Australian experiences (Jones Donald Strategy
171 Partners, 2009; Ryan & Huyton, 2000; Tourism Australia, 2009). This was found to be due to
172 the limited ability of indigenous tourism to satisfy key domestic holiday needs of relaxation
173 and indulgence (Jones Donald Strategy Partners, 2009).

174

175 There are an array of underpinning reasons as to why there is inconsistency between
176 government research results and independent researcher results. We acknowledge the reasons
177 and/or issues behind these inconsistencies beget the need for a comprehensive discussion,
178 however for the purpose of this paper, we suggest the inconsistencies emanate from (among
179 other things) variance in methodological underpinning, research methods and research tools.
180 For instance, in an overview of indigenous tourism research in Australia, Tremblay and
181 Wegner (2009) suggested that the largest proportion of published research falls within the
182 'abstract or opinion' based research; that is, opinion pieces about the opportunities or
183 constraints of indigenous tourism based on existing public knowledge and which involve no
184 new research and limited legitimate theoretical explorations. Moreover, arguably too many
185 studies have simply assumed there is a demand for indigenous tourism (O'Rourke, 2005),
186 accepting the findings of the public sector statistical collections.

187

188 Importantly though it is the methodology applied in the national visitor studies which we
189 argue is driving the inconsistencies between the reported optimistic demand levels and actual
190 visitors 'on the ground'. TRA (2011), for example, defines an indigenous tourism visitor as
191 one who participates in at least one indigenous tourism activity during their trip. This
192 definition also includes those visitors for whom participation may be a one-off activity. In
193 such cases, engagement is often therefore not the focus of a trip and/or not specifically
194 planned for, but rather occurs as an ancillary to a wider set of tourism experiences. As a
195 consequence of using such a broad definition, it promotes the inflation of the visitor spending
196 figures attributed to 'indigenous tourism visitors' by including the spending of visitors for
197 whom engagement in an indigenous tourism activity is either not the focus of the trip or
198 which occurs as an incidental activity. The uniqueness and significance of this current study
199 lies in the methods we have employed in our quest to obtain more representative data results
200 pertaining to indigenous tourism demand in Australia.

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1.1.1 Tourist Choice Sets and the Attrition Curve

Choice sets have been applied to tourism destination contexts and have become a common and central component of destination selection models. While there has been significant work undertaken in examining destination choice sets (see Decrop, 2010 for a comprehensive overview and critique of the evolution of destination choice sets) there are relatively limited investigations into tourism experience choice sets and particularly into indigenous tourism experiences as a choice option.

Choice sets were initially introduced by Howard (1963) in the field of consumer behaviour. Choice sets are based on the notion that a consumer's (i.e., tourists) product awareness, combined with their emotional associations to that product, then influence the development of their preferences for the alternatives from the consideration set (Woodside & Lysonski, 1989). Preferences are thus the rankings consumers/tourists assigned to products (i.e., from most liked to least liked). Intention to purchase is a consumer/tourist's perceived likelihood of purchasing a product within a specific time period.

Destination choice sets aim to explain how individuals select their destination through three key stages: 1) development of an initial awareness set, 2) selection of the preferred options and 3) a final selection that results in intention to visit or actual visitation (Um & Crompton, 1990). Um and Crompton's model is based on a three stage 'funnel' or attrition process where the awareness set is narrowed down to an evoked preference set, from which the final choice is selected. Woodside and Lysonski (1989) also applied traveller's consideration sets to a destination level. They aimed to gather top-of-mind responses from their respondents by asking unprompted questions as an indicator of how prominent the destination was in the mind of the consumer.

The destination literature suggests that there are an unlimited number of destination choices, but visitors only actively consider between two to six destinations during the decision-making process (Howard, 1963; Howard & Sheth, 1969; Thompson & Cooper, 1979; Um & Crompton, 1990; Woodside & Sherrell, 1977). This is likely to also be the case for tourist experiences, although the choice set is limited by the chosen host destination.

One tool that has been applied to plot the 'funnelling' of choice sets into intention to visit or actual visitation to a destination is the attrition curve model. In other disciplines such as medicine/health, finance, commerce, economics and management, attrition models have also been used to measure the loss of clients, customers or participants over time (Au, Li, & Ma, 2003; Eysenbach, 2005; Smith, 2010; Van den Poel & Lariviere, 2004). Because the concept of attrition refers to the gradual reduction in size of a variable (such as customers), the attrition curve will usually slope downwards from left to right; that is, it has a negative association.

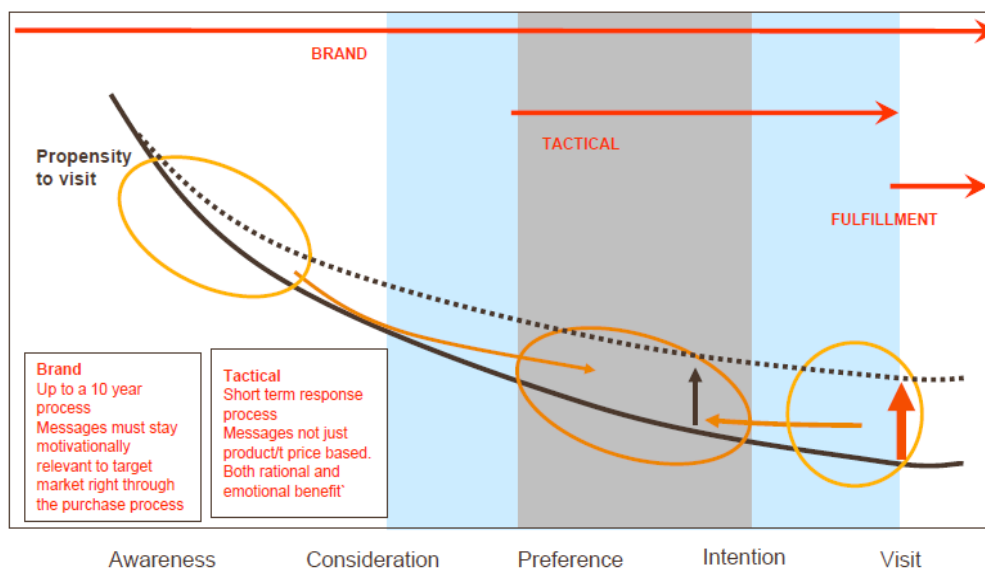
From a tourism perspective, the 'Attrition Curve of Tourist Demand' builds on the 'General Model of Destination Choice' (Woodside & Lysonski, 1989) and suggests that potential visitors go through a process of awareness, consideration, preference, and intention before they visit. Awareness of a product includes both the unprompted recall of a product from long-term memory and aided recognitions. The unprompted/unaided awareness is very important as it is strongly linked with positive attitudes, intentions to purchase and actual purchases (e.g. Axelrod, 1968; Bronner & de Hoog, 1985; Woodside & Carr, 1988). Thus, to encourage a consumer/tourist's preference for a specific destination, an effective tourism

251 marketing strategy needs to gain a large share of first mentions among consumers who are
 252 choosing between competing travel destinations. The shares of first mentions are estimated
 253 by using responses to a question such as: “of all the vacation-holiday destinations that would
 254 be available for you to visit...what destination first comes to your mind” (Woodside &
 255 Lysonski, 1989, p. 9). The destination responses are henceforth referred to as the
 256 consideration set.

257
 258 In practice, the ‘Attrition Curve of Tourist Demand’ is a tool that has been applied by tourism
 259 organisations in Australia (Department of Resources Energy & Tourism, 2008; Macfarlane &
 260 Jago, 2009), where it has been adopted to depict the relationship between the motivation
 261 variables of the model (i.e., awareness, preference and intention) and the behaviour variable
 262 (i.e., visitation). The attrition curve has five measurement points (Figure 1) including:
 263 destination awareness (percentage of people who have heard about Australia as a holiday
 264 destination); preference (percentage of people considering visiting Australia in the next three
 265 to four years); intention (percentage of people seriously considering going to Australia in the
 266 next 12 months); booking (percentage of people currently booked to travel to Australia); and,
 267 visited (percentage of people who have visited Australia in the past 12 months) (Department
 268 of Resources Energy and Tourism, 2008; Morrison, 2005). Mapping visitor preferences thus
 269 enables Tourism Australia to monitor the effectiveness of its brand and marketing
 270 communications.

271
 272 Macfarlane and Jago (2009) also applied the attrition curve in creating a methodology for
 273 determining and quantifying event induced tourism effects by linking awareness, preference,
 274 intention and visit. However, while the attrition curve is a model that can be used to evaluate
 275 tourist awareness, preference and intention to undertake a tourism experience, it is not a
 276 continuous phenomenon that can be used to predict behaviour. Whereas preference and
 277 intention are ‘thought’ variables that can be influenced largely by communication
 278 (marketing), actual visitation is influenced by external variables such as availability, cost and
 279 access. Correlations between preference and arrival are therefore a function not only of
 280 messaging and appeal of the tourism product but of externalities which vary both in time and
 281 personal context (Macfarlane & Jago, 2009). It is however, a useful tool for monitoring
 282 demand behaviour (Department of Resources Energy & Tourism, 2008).

283
 284 Figure 1. Attrition Curve of Tourist Demand



286 Source: Morrison (2005)

287

288 2.0 Method

289 To achieve the study aims and objectives, face-to-face surveys were administered to
290 international and domestic visitors in tourist precincts in Sydney, Melbourne, Cairns and
291 Darwin. Sydney and Melbourne are the two major international gateways and most visited
292 cities in Australia and so were selected as survey locations to provide access to both tourists
293 who have participated in indigenous tourism and those who have not. Cairns and Darwin are
294 locations which are generally accepted as relatively 'popular' destinations for indigenous
295 tourism and therefore were expected to provide access to higher populations of those visitors
296 who had more exposure or opportunity to participate in an indigenous tourism activity or
297 experience.

298

299 Teams of eight trained data collectors spent three to four days in each of the locations over
300 August and September 2012. The data collectors randomly approached people in the tourist
301 precincts and invited them to participate in the study. A sample of 1000 respondents was
302 initially sought: 500 international and 500 domestic respondents across the four locations. At
303 the conclusion of the survey, a total of 1357 useable surveys were collected representing:
304 international visitors (n=861; 63%); domestic overnight visitors (n=354; 26%); and domestic
305 day visitors (n= 142; 10%). Of these, 391 were collected in Sydney (representing a 68%
306 response rate); 303 in Melbourne (86% response rate); 315 in Cairns (70% response rate) and
307 348 in Darwin (78% response rate).

308

309 Respondents were not explicitly made aware at the commencement of the survey that the
310 study was focused on indigenous tourism. This was a deliberate strategy within the research
311 design to ensure the integrity of the responses by reducing the likelihood of a bias due to
312 respondents' attitudes and normative beliefs regarding indigenous tourism (Smith, 2007),
313 thus providing the opportunity to ascertain respondents unprompted awareness of indigenous
314 tourism vis-à-vis other tourism offerings in Australia. Instead respondents were approached
315 and invited to participate in a study on tourism products and experiences in Australia.

316

317 The respondent's experience (as opposed to destination) choice sets were elicited by
318 modifying Woodside and Lysonski (1989), Crompton and Ankomah (1993) and the attrition
319 curve work undertaken by Australian government tourism agencies (Department of
320 Resources Energy and Tourism, 2008; Macfarlane & Jago, 2009; Morrison, 2005). Crompton
321 and Ankomah (1993, pg. 461) stated that the choice sets concept "suggests that potential
322 tourists develop an early set of possible destinations, reduce this number to form a late
323 consideration set of probable alternatives, and make a final selection from that set". As
324 Woodside and Lysonski (1989) claimed, all unprompted options that the visitor is aware of
325 fall into the visitor's choice set. This is then reduced down into the consideration set which is
326 measured in this study by looking at experience preferences. The final selection from the set
327 is measured in this study as intention to undertake or having already undertaken the
328 experience. This was due to the study being an in-destination study.

329

330 This choice sets and demand decision-making data was plotted on an attrition curve. This tool
331 was employed as it has previously been applied within the Australian tourism industry and
332 government sectors to understand destination selection and could be readily and appropriately
333 applied to tourism experience selection. As a result, the survey was designed to collect
334 unprompted awareness, prompted preferences and prompted intentions/visit. The prompted
335 preferences and intentions were scaled down by the unprompted awareness. This is based on

336 the assumption that if the visitor was not aware of the experience, they cannot have a
337 preference or intention to visit (i.e., preferences are a function of awareness and emotional
338 associations) as per the arguments of Woodside and Lysonski (1989). While there are
339 arguably other choice sets, the awareness set was the starting point for this study as it is the
340 most common in the literature (Um & Crompton, 1990) and there were limitations to the
341 survey design given it was an in-destination survey. Moreover, there was a need to keep the
342 instrument reasonably short to balance the funding agencies requirements with respondent
343 fatigue. Additionally the survey instrument included financial and time scenario questions
344 designed to elicit, without prompting, the relative importance of indigenous tourism against
345 other experiences, followed by more specific questions about awareness, past experience,
346 exposure, interest and motivation to participate in indigenous tourism.

347
348 The attrition curve was used in this study to explore the survey respondents' (i.e., tourists)
349 propensity to undertake key Australian experiences, including an indigenous tourism
350 experience. The attrition curves were developed from three key questions in the visitor
351 survey. Firstly, visitors were asked to identify all the experiences they were aware of, that
352 they could undertake in Australia. This question was unprompted, so respondents listed as
353 many activities as they could that were 'top-of-mind' and these were coded as either:
354 Outdoor/nature experiences; Active outdoor/sport experiences; Arts/heritage experiences;
355 indigenous (referred to as Aboriginal in the survey) cultural experiences; Local
356 attractions/tourist experiences; and Social or other experiences. These groupings were based
357 on TRA's International Visitor Survey (IVS) and National Visitor Survey (NVS) broad
358 activity groupings, which are highly comprehensive groupings that include all experiences
359 reported in Australia by over 160,000 respondents each year for the past 15 years. This
360 provided a measure for unprompted awareness, that is, the percentage of respondents who
361 mentioned a specific tourism experience top-of-mind.

362
363 Next the respondents were asked to rate how important it was for them to experience 17
364 specific experiences and activities while in Australia. Again, this standard list of experiences
365 was derived from the IVS and NVS activity lists and directly corresponded to the broad
366 activity groupings published by TRA and used to code the previously outlined 'awareness'
367 question. To provide a measure of prompted preferences for each broad experience category,
368 the experience and activities items were mapped to the broader activity groupings and means
369 were generated and then converted into percentages (i.e., if the mean was 3, then the
370 corresponding percentage was 60%). This prompted preference percentage was then scaled
371 down by unprompted awareness to align with the attrition curve theory (Department of
372 Resources Energy and Tourism, 2008; Macfarlane & Jago, 2009; Morrison, 2005). That is,
373 unprompted awareness of an experience category was 15%, and preference for the experience
374 was 60%, then the scaled down preference percentage would be 9% (i.e., 15% multiplied by
375 60%).

376
377 Finally, the respondents were asked if they already had, or planned to, undertake any of the
378 17 experiences or activities on the standard list derived from TRA's IVS/NVS activity lists.
379 Again, these standard experience or activity items were mapped to the broad activity
380 groupings. From this it was possible to generate the percentage of respondents who had an
381 intention or had undertaken a particular type of experience (i.e., X% of respondents stated
382 they had or intended to undertake an indigenous [Aboriginal] cultural experience). This was
383 then scaled down by unprompted awareness, so if unprompted awareness of an experience
384 category was 15%, and intention to undertake the experience was 40%, then the scaled down
385 preference percentage would be 6% (i.e., 15% multiplied by 40%). The unprompted

386 awareness, preference and intention percentages could then be plotted along the attrition
387 curve.

388

389 There were several limitations and delimitations of this study. First, only visitors in the four
390 collection regions were included in the visitor survey. They were selected via convenience
391 sampling in common and acknowledged ‘tourist’ areas of the cities. Second, the research did
392 not account for change in perceptions/visitor type due to seasonality. Third the survey was
393 conducted in both English and Chinese (to account for the funding partners requirements for
394 a Chinese sample of international visitors) and post-data analysis small discrepancies were
395 noted in the translation of several of the questions in the Chinese version of the survey which
396 may have influenced how the respondents interpreted those questions. However, as the data
397 was collected via interviews (as opposed to self-completed questionnaires) by bilingual data
398 collectors, interpretation errors should have been negated. The study was delimited to
399 exploring only the awareness, preferences and intention aspects of the attrition curve. Future
400 research could apply the attrition curve and extend to incorporate the behavioural variable
401 (visitation).

402

403 3.0 Results

404

405 3.1 Attrition Curve: Mapping Unprompted Awareness, Preference and Visitation of 406 Indigenous Tourism Experiences

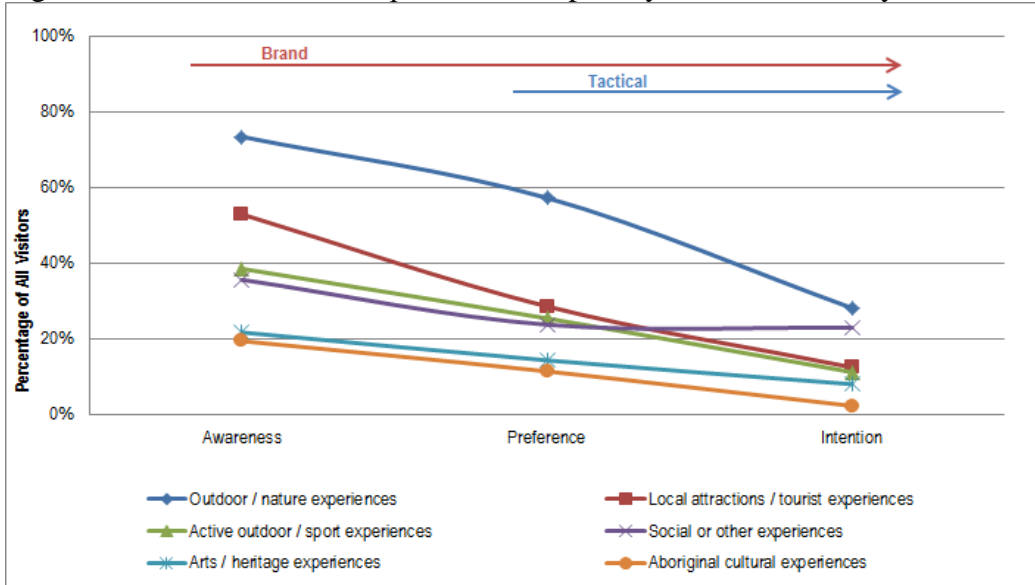
407 To identify *awareness* of indigenous tourism products and experiences, tourists were asked,
408 without prompting, “What experiences are you aware of that can be undertaken in Australia?”
409 The open ended responses to this question were coded into the six IVS/NVS
410 experience/activity options of outdoor/nature experiences, active-outdoor/sport experiences,
411 arts/heritage experiences, local attractions/tourist experiences, social experiences, and
412 indigenous (aboriginal cultural) experiences. A further question, which was a prompted
413 question, provided respondents with a list of 17 common experiences and activities that can
414 be undertaken in Australia, including five specific options for indigenous tourism. For this
415 question, respondents were asked to rate, on a scale of 1 to 5, the importance of experiencing
416 these activities while holidaying in Australia. These responses were recoded into the six
417 experience categories which allowed for the measurement of *preferences*. Finally, using the
418 same list of 17 experiences and activities, respondents were asked whether they had, or would
419 be, participating in any of the experiences and activities while in Australia. Again the answers
420 were recoded into the six experience categories which allowed for the measurement of
421 *intention*.

422

423 Plotting unprompted awareness, as well as preferences and intentions scaled down by
424 unprompted awareness to account for the attrition curve theory, we can see that indigenous
425 (Aboriginal cultural) experiences substantially underperformed in respondents’ *top-of-mind*
426 *awareness, preferences* and *intentions* to undertake the experience when compared with the
427 five other broad Australian experience categories (see Figure 2).

428

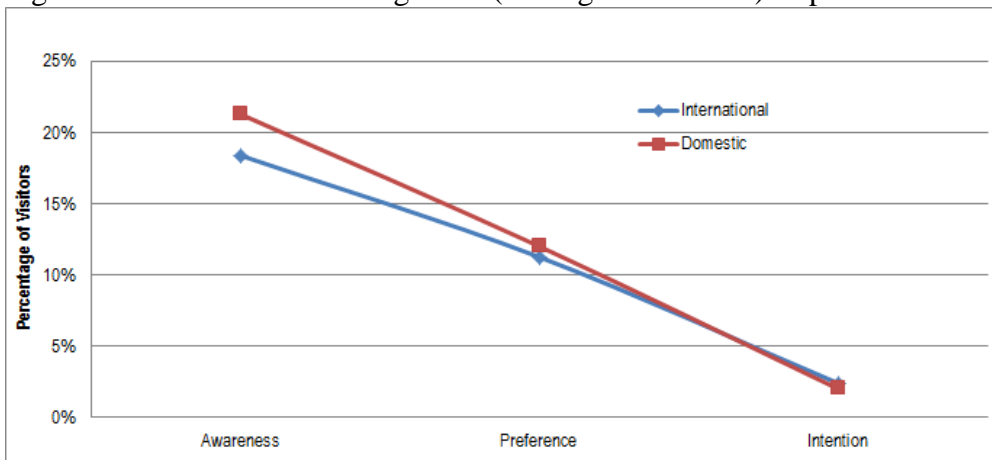
429 Figure 2. Attrition Curve: Respondents' Propensity to Undertake Key Australian Experiences



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Furthermore, the attrition curve in Figure 3 shows that for the awareness of indigenous experiences, there is little difference between international and domestic respondents: domestic respondents had slightly higher awareness levels (21%), citing indigenous tourism as an experience option available in Australia only marginally more often than international visitors (18%).

Figure 3. Attrition Curve: Indigenous (Aboriginal Cultural) Experiences



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Using the attrition curve theory, preferences and intentions were scaled down by unprompted awareness, which indicates that 12% of domestic visitors and 11% of international visitors have awareness and preference to undertake an indigenous activity and just 2% of domestic and international visitors are aware of and intend to undertake an indigenous tourism activity. Notably, the preferences and intention points were very close for both visitor groups, despite domestic visitors having slightly higher awareness of the available experiences. Each of these are explored in further detail below.

3.2 Awareness set

450 The respondents were asked, without prompting from the interviewers, what activities and
451 experiences they were aware of that could be undertaken in Australia. This question was
452 aiming for spontaneous responses that would elicit respondents' 'top of mind' awareness of

453 the types of activities, experiences or attractions available in Australia. Importantly, at this
 454 stage of the questionnaire, respondents were not aware, that the study was focused on
 455 indigenous tourism.

456
 457 ‘Outdoor/nature experiences’ generally and ‘local attractions/tourist experiences’ (citing
 458 particular attractions and experiences in the local vicinity) were the top of mind responses for
 459 the majority of visitors. ‘Arts/heritage experiences’ were top of mind for 22% of all
 460 respondents, and indigenous (Aboriginal cultural) experiences were for 19% of respondents.
 461 Domestic respondents were significantly more aware of the ‘arts/heritage experiences’ (p
 462 <0.001) available than international visitors (Table 1).

463
 464 Table 1. 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%

465
 466 3.3 Preferences

467 To determine the relative importance international and domestic visitors placed on
 468 indigenous tourism experiences vis-à-vis other tourism activities, respondents were asked to
 469 identify their ‘top’ or ‘must see’ tourist attractions or experiences in Australia. Tourists were
 470 asked, “if you had unlimited time and money what are the top five things you would like to
 471 do while in Australia?” This was designed to identify the spontaneous or unprompted
 472 awareness of, and interest in, indigenous tourism experiences.

473
 474 The ‘top’ attraction/experience on both the domestic and international visitors ‘wish list’ was
 475 general ‘sightseeing/travelling around’ with 37% of domestic and 50% of international
 476 respondents citing this as their most desired experience in Australia (Table 2). Indigenous
 477 tourism was ranked 37th for international visitors and 59th for domestic visitors.

478
 479 Table 2. Top Australian Experiences - Domestic and International Visitors (unprompted)

Rank	Domestic Visitors		International Visitors	
	Desired experience	% Domestic visitors	Desired experience	% International visitors
1	Sightseeing	37%	Sightseeing	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

480
481

482 3.4 Intention

483 Respondents were then asked to consider activities and experiences that could be undertaken
484 while visiting Australia from a predetermined list of 17 Australian experiences. The list was a
485 randomised and abridged version of the standardised visitor experience and activities list
486 developed to code activity responses in TRA's international and national visitor surveys.
487 Here, respondents were asked to rate on a scale of 1 to 5 (where '1' is not at all important and
488 '5' is extremely important), how important it was to undertake certain experiences while in
489 Australia. The respondents were also asked to state whether they had, or planned to,
490 undertake any of the experiences while on this trip. Table 3 shows that sightseeing was
491 important (mean 4.2) and that the vast majority of both domestic (84%) and international
492 (82%) respondents were undertaking this activity. Other activities such as national parks/state
493 parks/etc., while rated relatively high by respondents in terms of importance as an activity,

494 had fewer respondents intending to participate during this trip (Table 3).

Table 3. 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%

1 Respondents were still not aware at this point that the survey was focused on indigenous
 2 tourism although five of the experience options in the list related to indigenous tourism.
 3 ‘Going on a tour with an Aboriginal guide’, ‘visit and Aboriginal cultural centre/gallery’, ‘see
 4 an Aboriginal performance’, and ‘visit and Aboriginal site or community’ ranked around the
 5 midpoint of the scale with means of 3.1 and 3.0 for all visitors. Somewhat further down the
 6 importance scale was to ‘stay with an Aboriginal host’. The results show that few domestic
 7 visitors had intentions to participate in indigenous activities (e.g., ‘going on a tour with an
 8 Aboriginal guide’ 10%; ‘visit and Aboriginal cultural centre/gallery’ 14%; ‘see an Aboriginal
 9 performance’ 10%; ‘visit and Aboriginal site or community’ 10%; and, ‘stay with an
 10 Aboriginal host’ 3%). Intentions to participate in indigenous activities were slightly higher
 11 among international visitors (e.g., ‘visit an Aboriginal cultural centre/gallery’ and ‘see an
 12 Aboriginal performance’ were more popular at 20% and 18% respectively) (Table 3).

13
 14 For each of the indigenous related activities domestic respondents were significantly less
 15 likely than international respondents to consider it important to:

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

21
 22 In contrast, there were no significant differences found between domestic and international
 23 respondents in terms of how important it was to them to visit national parks/state parks/world
 24 heritage sites/botanical gardens; events, festivals, fairs and markets; shopping; museums, art
 25 galleries, history/heritage buildings, sites or monuments; and, visit the Outback (Table 3).

26 27 3.5 Barriers to Participation

28 To explore the barriers that prevent tourists from undertaking an indigenous experience in
 29 Australia, international and domestic visitors who indicated that they would not be
 30 participating in indigenous tourism were asked to rate a range of potential barriers on a scale
 31 of 1 ‘not at all’ to 5 ‘to a very great extent’. It was at this point that the survey participants
 32 were informed that the remaining questions would focus specifically on indigenous tourism.

33
 34 International tourists ranked ‘limited time available’ as the main barrier to participating, with
 35 ‘budget’, ‘other activities’ and ‘access’ also ranking above the mid point on the scale. Other
 36 items on the scale rated below the neutral response (i.e., 3 on the scale) and therefore were
 37 not seen as barriers to participating by the majority of respondents. Similarly, with domestic
 38 tourists there were few barriers that rated above the neutral point of 3 on the scale (Table 4);
 39 only ‘limited time available’ and ‘engaged in other activities/sightseeing’ rated.

40
 41 Table 4. 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	703	3.0	1.4

prestigious)			
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

42 *5 point scale from 1 "Not at all" to 5 "To a very great extent"

43

44 Within the visitor survey, there was an option for respondents to list any other factors that
 45 they considered to be barriers. The other barriers respondents indicated were: the experience
 46 was not deemed authentic (n=62); and they had previously participated in an indigenous
 47 activity and did not see a need to do so again (either in Australia or overseas) (n=12). While a
 48 low sample, several responses also related to previous negative interactions with indigenous
 49 individuals and/or communities; and having close contact with indigenous peoples and/or
 50 communities via friendships, employment or living in indigenous communities. Some
 51 respondents had participated in an indigenous experience in another country and did not wish
 52 to do so again in Australia.

53

54 Given the relatively low levels of preference and intention/visit, discussed previously with
 55 regards to the attrition curve, the extent to which these results (i.e., the neutrality of most of
 56 the barriers in Table 4) truly reflect the barriers to participating in indigenous tourism should
 57 be considered in relation to the following assumption. Respondents may have been hesitant to
 58 articulate broader barriers pertaining to otherwise culturally sensitivity issues relating to
 59 indigenous peoples and/or communities. In essence, respondents may have felt the need to
 60 adhere to political correctness, which may have unduly influenced the results in relation to
 61 barriers to participating in indigenous tourism.

62

63 4.0 Discussion & Conclusions

64 It was against a multifarious and complex backdrop of research motives, intentions and
 65 outcomes, that this study was commissioned by a government agency responsible for, among
 66 other things, providing start-up funding for indigenous businesses (including tourism
 67 businesses). The agency questioned the extent to which existing visitor statistics pertaining to
 68 indigenous tourism were representative of actual demand, given that too many indigenous
 69 tourism businesses are failing in a relatively short timeframe as a result of, among other
 70 things, unsustainably small visitor flows. Thus the current study was commissioned in part, to
 71 examine visitor demand through a research design that attempted to circumvent some of the
 72 apparent limitations of previous studies, particularly around survey bias and socially desirable
 73 responses (Smith, 2007). The attrition curve approach adopted in this study has proved
 74 effective and valuable in achieving this aim.

75

76 The results of this study confirm that claims of high levels of visitor interest and demand for
 77 Australia's indigenous tourism product, which have been made by a range of public sector
 78 agencies in Australia (Tourism Research Australia, 2010), are overstated and should be
 79 viewed with caution. Overall, the results from this study reveal that participating in an
 80 indigenous tourism experience in Australia is not an activity that either domestic or
 81 international tourists prioritise on their holiday agendas. Moreover, uptake of what little
 82 interest there is (i.e., intention to participate) is also very low.

83

84 Such low visitor interest in indigenous tourism in Australia is concerning given that
85 'Aboriginal Tourism' is currently supported by Tourism Australia as one of its three key
86 industry sectors (along with the cruise industry and luxury lodging sector). Moreover,
87 'Aboriginal Australia' continues to be promoted by Tourism Australia as one of the seven
88 uniquely Australian experiences (the other six include Aussie Coastal Lifestyle; Australian
89 Journeys; Australia's Major Cities; Food and Wine, Nature in Australia; and Outback
90 Australia). These current marketing campaigns are indicative of the range of marketing
91 campaigns that have been undertaken by Tourism Australia over the last decade, which have
92 utilised to varying degrees, indigenous imagery and experiences. For example, the most
93 current 2014 international tourism marketing campaign contains indigenous artwork of a
94 kangaroo alongside the words, *There's Nothing Like Australia*. Yet despite the efforts of such
95 international marketing campaigns, the international market's lack of awareness about
96 indigenous tourism suggests these campaigns have been less than effective.

97

98 Indeed, Buultjens & White's (2008) study found that between 60% and 80% of international
99 visitors who were either interested in experiencing, or had experienced an indigenous tourism
100 product believed they had been exposed to very little advertising. Buultjens & White's (2008)
101 claim is supported by the results from the attrition curve analysis conducted in this study. For
102 instance, 53 respondents mentioned 'lack of promotion' as a barrier to their participation in
103 indigenous tourism in Australia and according to one respondent, "after being in Australia for
104 a month I have never seen Aboriginal experiences promoted". Moreover, many of the data
105 collectors reported a number of the respondents asking where they could actually go to
106 participate in scenarios, which were presented in the questionnaire. For example respondents
107 reported that "travel agents in the US did not mention Aboriginal options to us otherwise we
108 might have been very interested in some of these options" while another said "all activities
109 sound great but don't know how to do them".

110

111 An overall lack of awareness however, is not the only challenge facing the sector.
112 Contributing to the challenges and/or barriers faced by indigenous tourism operators is an
113 apparent tourist indifference towards participating in indigenous tourism experiences.
114 According to one respondent, the opportunity to experience indigenous tourism rates as a
115 "care factor zero probably for a lot of people. Not interested in our Aboriginal people".
116 Moreover, the results (see Figures 2 & 3) revealed that those domestic tourists in particular,
117 who are aware of indigenous tourism opportunities, are not interested in participating in
118 indigenous tourism experiences. Contributing factors (which were revealed in some of the
119 open-ended statements of surveys) included perceived familiarity, racism and/or negative
120 media attention. Perceived 'familiarity' with indigenous peoples (i.e., culture, customs,
121 traditions) or 'backyard syndrome' is a key issue with a respondent noting "I'm from Darwin
122 so indigenous stuff is everywhere so (I) never bothered to hunt it down", while another said
123 "I think maybe sometimes when it's in your backyard you don't appreciate it so much". Such
124 indifference to indigenous tourism product from the domestic market arguably poses a major
125 challenge for the sector as the Australian domestic market comprises some 80% of the
126 country's tourists.

127

128 Given these results, it is not surprising that for many indigenous tourism operators,
129 translating tourists' interest into actual, on the ground participation is proving problematic.
130 Yet governments continue to promote tourism as a socio-economic cure-all for indigenous
131 peoples. The findings of this study throw open a range of questions and issues regarding the
132 socio-political objectives of Australia's government agencies involved with tourism. As early

133 as the early 1990s, cautious observers have maintained that “tourism will not provide an
134 instant panacea for Aboriginal economic disadvantage” (Altman, 1993a, p. 12). More
135 recently, Buultjens, Brereton, et al. (2010) commented on the tenuous nature of indigenous
136 tourism and warned that despite enthusiasm about its potential, only a select few businesses
137 are capturing the purported. Yet tourism continues to be promoted to indigenous people as a
138 universal, cure-all economic development opportunity providing, among other things,
139 increased employment and business opportunities. For example, in a 2010 report by TRA
140 which profiles indigenous tourism in Australia, indigenous tourism is recognised by the
141 Australian Government as “a means for economic development for indigenous Australians”
142 (p.1). Such evidence suggests that government is glossing over (or ignoring) the reality of the
143 current market situation and continues to espouse tourism as the magic bullet for a range of
144 socio-economic challenges facing contemporary indigenous Australians.

145
146 Our concern is that the full potential of indigenous tourism in Australia remains an unknown
147 quantity and the purported development of the sector continues to be based on assumptions.
148 We strongly advocate the need for further research to better identify and understand the
149 extent to which indigenous tourism can be grown and the pathways for effective
150 development. For instance, we need to investigate further, if low levels of awareness and
151 demand for indigenous tourism in Australia is a result of general indifference to the product
152 or if they are a result of inadequate and/or ineffective marketing and promotion strategies.
153 Moreover, we need to determine if developing targeted marketing and educational campaigns
154 to demonstrate to the broader community, the scope and breadth of indigenous tourism
155 operations in Australia is a suitable and effective option to increase product demand.

156
157 In the interim however, several recommendations can be made to increase the awareness of
158 both international and domestic markets. For the international market, promotion of export
159 ready indigenous tourism businesses through international distribution channels and targeted
160 marketing campaigns must be continued and possibly increased. Micro, small and start-up
161 businesses could be better integrated into local tourism distribution channels to increase
162 product awareness at both the international and domestic levels. Given that research has
163 suggested that of the total indigenous tourism visitor market, domestic visitors represent over
164 70% (Tourism Research Australia, 2010), it is certainly worthwhile investing in strategies to
165 increase the awareness of the domestic market. Awareness/marketing programs targeted at
166 the domestic market that highlight the range of indigenous offerings available in Australia
167 could also be developed. Strategies to overcome the low levels of interest and participation in
168 indigenous tourism and the negative perceptions amongst the domestic market will also be
169 necessary. Moreover, the low levels of demand for the current indigenous tourism product
170 offerings suggest alternative approaches to indigenous tourism development should be
171 considered. For instance, some operators in Australia have recognised the opportunities to
172 package indigenous tourism content into mainstream tourism product offerings such as
173 accommodation, restaurants and retail. This approach is advocated for instance, in Tourism
174 Queensland’s Indigenous Tourism Strategy. Other options include complimenting an existing
175 tourism attraction or experience with an indigenous element in culture, interpretation, history
176 or nature. While others have chosen to engage in the tourism supply chain but not identify
177 their business as indigenous owned and operated.

178
179 Thus there is range of pathways to pursue in the development of indigenous tourism in
180 Australia. At this point in time however, this paper is calling ‘time out’ for a reality check.
181 The development of indigenous tourism in Australia has been on the political agenda now for
182 nearly twenty years and while the sector has grown significantly during this time, the results

183 from this national demand study (coupled with other challenges), suggest long-term
184 sustainability of the sector is precarious. We suggest reality calls for government agencies to
185 discontinue espousing high levels of demand for indigenous tourism in order to cover
186 inadequacies in government marketing strategies and/or to ensure boxes are ticked for
187 political gain. We suggest reality calls for governments to discontinue presenting tourism
188 carte blanche, as a generic means of realising socio-economic benefits as the current domestic
189 and international visitor markets are not robust enough to cater for so many new businesses
190 entering into the market. Finally, we suggest the reality is that indigenous tourism is an
191 invaluable niche sector of the Australian tourism industry. Arguably, it has the potential to
192 provide socio-economic benefits to, at this stage an unknown (but arguably small) percentage
193 of indigenous tourism businesses whose stakeholders are au fait with the complexities and
194 volatility of the national and global tourism industry.

195

196 Acknowledgements

197 This study was funded by Indigenous Business Australia and Tourism Australia.

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	Domestic Respondents		International Respondents	
	Frequency	Percent (%)	Frequency	Percent (%)
Outdoor / nature experiences	356	74.2	608	73
Local attractions / tourist experiences	259	54	436	52.3
Active outdoor / sport experiences	215	44.8	291	34.9
Social or other experiences	174	36.3	293	35.2
Arts / heritage experiences	135	28.1	150	18
Aboriginal cultural experiences	102	21.3	153	18.4
Total respondents	480	100	833	100

	Experience	Domestic and International IBA resp		
		Observations	Mean	Std. Dev.
Social or other experiences	Sightseeing / looking arou	1253	4.2	0.9
Outdoor / nature experiences	National parks /	1255	4.1	1
Local attractions / tourist experiences	Wildlife parks / zoos / aqu	1249	3.7	1.1
Arts / heritage experiences	Museums, art galleries, h	1254	3.5	1.1
Outdoor / nature experiences	Visit the outback	1240	3.7	1.2
Arts / heritage experiences	Events, festivals, fairs an	1253	3.5	1.1
Active outdoor / sport experiences	Sports / Adventure activit	1233	3.3	1.3
Aboriginal cultural experiences	Go on a tour with an Abor	1246	3.1	1.3
Aboriginal cultural experiences	Visit an Aboriginal cultura	1246	3.1	1.2
Aboriginal cultural experiences	See an Aboriginal perform	1233	3	1.2
Aboriginal cultural experiences	Visit an Aboriginal site or	1237	3	1.2
Social or other experiences	Shopping	1245	2.9	1.3
Social or other experiences	Pubs, clubs, discos, casin	1242	2.9	1.4
Arts / heritage experiences	Attend theatre, concerts c	1258	2.9	1.2
Aboriginal cultural experiences	Stay with an Aboriginal ho	1236	2.5	1.2
Local attractions / tourist experiences	Amusement / theme park	1257	2.3	1.3
Local attractions / tourist experiences	Health spa or wellbeing c	1236	2.1	1.2

Total Respondents

	Awareness	Preference	Intention / visit	
Outdoor / nature experiences	73.40%	3.9	38%	78%
Local attractions / tourist experiences	52.90%	2.7	24%	54%
Active outdoor / sport experiences	38.50%	3.3	29%	66%
Social or other experiences	35.60%	3.3	64%	67%
Arts / heritage experiences	21.70%	3.3	37%	66%
Aboriginal cultural experiences	19.40%	2.9	12%	59%

Domestic Respondents

	Awareness	Preference	Intention / visit	
	Percent (%)			
Outdoor / nature experiences	74.2	4	31%	77%
Local attractions / tourist experiences	54	3	18%	53%

International and Domestic Visitor Survey

For the Interviewer to record:

1. Record language of interview:

- English
- Chinese

2. Record location and city of interview:

- Sydney Harbour / Opera House, Sydney
- Other Sydney location
- Melbourne
- Cairns
- Darwin

Introduction and ethics

Hello, I am undertaking a survey on behalf of the School of Tourism at the University of Queensland. I was wondering if you would be willing to spend approximately 15-20 minutes of your time to complete this survey concerning travel preferences and intentions in Australia with me?

If yes:

Here is a card with information on the ethics clearance and contacts for this study. Your responses are completely anonymous and you can withdraw at any time.

3. If no, what is their reason for not wanting to participate in the survey?

- Not enough time
- Don't like surveys

Other (please specify)

Screening Question

International and Domestic Visitor Survey

4. Are you currently travelling within Australia? That is, are you either:

- an international visitor to Australia
- an Australian resident who is away from home for at least one night, at a place at least 40kms from your home?
- an Australian resident who is on a daytrip that is at least 50kms in total and will be away from home for at least 4 hours?

[exclude commuting, travel as a part of your job (i.e. bus driver) or any other trip to the same place to do the same thing at least once a week]

您目前是否在澳洲旅游？您是否是：

- 澳洲的国际旅客
- 离家至少一晚的澳洲居民（这里远离您家至少有**40公里**）
- 离家至少四个小时的澳洲居民（这里远离您家至少有**50公里**） [不包括您为了工作而行驶（比如巴士司机）或您每一个星期至少一次到同样的地方做同样的事。]

- Yes, international visitor
- Yes, domestic overnight visitor
- Yes, domestic daytrip visitor
- No
- Don't Know

Questions for Australian Residents

5. How many nights will you be away from home on this trip? (nnn)

6. What is your state of residence?

- New South Wales
- Victoria
- Queensland
- South Australia
- Western Australia
- Northern Territory
- Tasmania
- Australian Capital Territory

International and Domestic Visitor Survey

7. What is the main reason for this trip?

- Holiday
- Visiting friends or relatives
- Business
- Convention / Conference
- Employment
- Education
- Exhibition
- Training or research
- To attend an event or sport

Other (please specify)

Questions for International Visitors

8. What is your country of residence?

您的居住国是什么？

- | | | |
|---|--|-----------------------------------|
| <input type="radio"/> Canada | <input type="radio"/> Israel | <input type="radio"/> Scotland |
| <input type="radio"/> China | <input type="radio"/> Italy | <input type="radio"/> Singapore |
| <input type="radio"/> Denmark | <input type="radio"/> Japan | <input type="radio"/> Spain |
| <input type="radio"/> England | <input type="radio"/> Korea | <input type="radio"/> Sweden |
| <input type="radio"/> Fiji | <input type="radio"/> Malaysia | <input type="radio"/> Switzerland |
| <input type="radio"/> Finland | <input type="radio"/> Netherlands | <input type="radio"/> Taiwan |
| <input type="radio"/> France | <input type="radio"/> New Zealand | <input type="radio"/> Thailand |
| <input type="radio"/> Germany | <input type="radio"/> Northern Ireland (British) | <input type="radio"/> USA |
| <input type="radio"/> Hong Kong | <input type="radio"/> Norway | <input type="radio"/> Vietnam |
| <input type="radio"/> India | <input type="radio"/> Papua New Guinea | <input type="radio"/> Wales |
| <input type="radio"/> Indonesia | <input type="radio"/> Philippines | |
| <input type="radio"/> Ireland (Republic of) | <input type="radio"/> Scandinavia | |

Other (please specify)

9. How many nights will you be in Australia in total on this trip?

在这次的此行中，你会在澳洲内呆上几个晚上？

International and Domestic Visitor Survey

10. When you arrived in Australia and completed your INCOMING PASSENGER CARD, what did you list as your main reason for coming to Australia?

当您到达澳洲并完成您的入境乘客卡时，您列出的主要原因是什么？

- Holiday 旅游
- Visiting friends and relatives 探亲访友
- Business 工作
- Convention / Conference 会议
- Employment 雇用
- Education 教育
- Exhibition 展览
- Immigration 移民
- Purpose not completed on card 没有完成入境卡

Other (please specify) 其他 (请注明)

Awareness (spontaneous)

11. What experiences are you aware of that can be undertaken in Australia? (unprompted)

您认为在澳洲里可以采取到什么经验？

- Outdoor / nature experiences
- Active outdoor / sport experiences
- Arts / heritage experiences
- Aboriginal cultural experiences
- Local attractions / tourist experiences
- Social or other experiences

Preference

12. If you had unlimited time and money, what are the top five things (in order of importance) that you would like to see or do in Australia:

如果您有无限的时间和金钱，您在澳洲想看或做的前五名事是什么？请按重要性排列。

No. 1	<input type="text"/>
No. 2	<input type="text"/>
No. 3	<input type="text"/>
No. 4	<input type="text"/>
No. 5	<input type="text"/>

International and Domestic Visitor Survey

13. Are you are undertaking these experiences on this trip?

在这次的此行中，您会不会体验这些经验？

	Yes	No	Don't Know
No. 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No. 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No. 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No. 4	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
No. 5	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Consideration

14. Below is a list of experiences and activities that can be undertaken in Australia.

Please rate on a scale of 1 to 5 how important it is for you to experience these while in Australia:

以下是一个能够在澳洲体验到的经验和活动的列表。对于在澳洲体验到这些经验或活动的重要性，请按1至5个等级分别列出（1=不重要；5=非常重要）。

	Not at all important	2	3	4	Extremely Important
Amusement / theme parks 游乐园	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Attend theatre, concerts or performing arts 参加戏剧，音乐会或表演艺术	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Events, festivals, fairs and markets 参加活动, 节日, 集贸市场	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Go on a tour with an Aboriginal Guide 同原住民/土著导游一起旅游	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Health spa or wellbeing centre 健康水疗或福利中心	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Museums, art galleries, history / heritage buildings, sites or monuments 博物馆，美术馆，历史/文物建筑，遗址或古迹	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
National parks / state parks / world heritage sites/ botanical gardens 国家公园/世界遗产/植物园	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Pubs, clubs, discos, casinos and restaurants 酒吧，夜总会，迪斯科舞厅和赌场	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
See an Aboriginal performance 观看原住民/土著的表演	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Shopping 购物	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sightseeing / looking around 游览	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Sports / Adventure activities 体育/冒险活动	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Stay with an Aboriginal host (in Aboriginal owned/run accommodation) 居住在原住民/土著主机的地方	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit an Aboriginal cultural centre/gallery 参观原住民/土著文化中心/画廊	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit an Aboriginal site or community 参观原住民/土著的地方或社区	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visit the outback 参观内陆地区	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wildlife parks / zoos / aquariums 野生动物公园/动物园/水族馆	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Consideration (continued)

International and Domestic Visitor Survey

15. Have you, or do you plan to, undertake any of the following activities or experiences while on this trip?

在这次的此行中，您有没有打算进行下列任何活动或经验？

- Amusement / theme parks
- Attend theatre, concerts or performing arts
- Events, festivals, fairs and markets
- Go on a tour with an Aboriginal Guide
- Health spa or wellbeing centre
- Museums, art galleries, history / heritage buildings, sites or monuments
- National parks / state parks / world heritage sites/ botanical gardens
- Pubs, clubs, discos, casinos or restaurants
- See an Aboriginal performance
- Shopping
- Sightseeing / looking around
- Sports / Adventure activities
- Stay with an Aboriginal host (in Aboriginal owned/run accommodation)
- Visit an Aboriginal cultural centre/gallery
- Visit an Aboriginal site or community
- Visit the outback
- Wildlife parks / zoos / aquariums

Don't intend to visit

16. An Aboriginal experience is an interaction with Aboriginal people that provides an opportunity to learn about Aboriginal culture.

原住民/土著的经验包含着与土著人民的相互作用并被提供了一个能够深入了解原住民/土著文化的机会。

Have you ever previously undertaken an Aboriginal experience in Australia?

您有没有在澳洲体验过原住民 / 土著的经验？

- Yes
- No
- Don't Know

International and Domestic Visitor Survey

17. Are you likely to undertake an Aboriginal experience in Australia sometime in the future?

你很可能在未来的某个时候在澳洲进行原住民 / 土著人之类的经验吗？

- In the next month
- In the next year
- In two to five years
- One day, but not in the next 5 years
- Never

Barriers

18. On a rating of 1 to 5, with '1' being not at all and '5' being to a very great extent, please indicate the extent to which each of the following has prevented you from undertaking an Aboriginal experience in Australia:

以下的因素说明在何种程度上阻碍了你在澳洲进行原住民 / 土著经验的影响力，请按1至5的评分标准(1 = 没有影响，5 = 很大的程度) 打分。

	Not at all	To a small extent	To a moderate extent	To a great extent	To a very great extent	Don't Know
Activity is too expensive/limited budget 活动过于的昂贵 / 个人计算有限	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other activities provide better value for money 其他的活动提供更高的价值	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Access/transport availability 交通 / 运输的可用性	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Too far to travel 太远的旅程	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Too busy with other activities/sightseeing 忙于其他事	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of interest 没兴趣	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Limited time available 时间有限	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outside my comfort zone (Cultural or language barriers) 感到不舒服 (文化或语言阻碍)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Don't know where to go/what is available/how to book 不知道哪里去 / 有什么 / 怎么预约	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not available in destinations you are visiting 您游览的目的地没有提供	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not a high priority (not recommended by others, not prestigious) 没有高优先级 (别人没推荐, 不著名)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Prefer more adventurous or active activities (not fun / exciting enough) 比较喜欢惊险或积极的活动 (不够好玩 / 不够精彩)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Worried about safety or food 对于安全或食品感到担忧	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Not authentic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please list any other factors that have prevented you from undertaking an Aboriginal experience in Australia: 请列出任何其他因素阻止你在澳洲进行原住民 / 土著经验:

International and Domestic Visitor Survey

Two hour walking tour with an Aboriginal Guide

I am now going to ask you about a series of specific Aboriginal experiences or activities that can be undertaken in Australia.

我现在要问你能够在澳洲采取的一系列原住民 / 土著经验或活动。

19. The first experience I will ask you to consider is 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.

和原住民/土著导游一起步行游览两个小时。经过这个旅程，你会体会到丛林食物、历史、传统、与文化。这将会在主要省会城市的行驶距离内。

Please rate how appealing going on a two hour walking tour with an Aboriginal guide is to you:

请您评估和原住民导游两个小时徒步旅行的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Two hour walking tour with an Aboriginal Guide

20. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Two hour walking tour with an Aboriginal Guide

International and Domestic Visitor Survey

21. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

22. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify)

Two hour walking tour with an Aboriginal Guide

International and Domestic Visitor Survey

23. Which of the following factors are impacting your ability or preferences to go on a two hour walking tour with an Aboriginal guide?

以下哪些因素影响了您和原住民导游去上两个小时徒步旅行的偏好设定？

- Not authentic
- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food

Other (please specify) 其他 (请注明)

Two hour walking tour with an Aboriginal Guide

24. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

25. How much are you willing to pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Two hour walking tour with an Aboriginal Guide

26. Why is going on a two hour walking tour with an Aboriginal guide unappealing?

和原住民导游徒步旅行两个小时缺乏吸引力的原因是什么？

- Activity is too expensive / limited budget 活动过于的昂贵 / 个人计算有限
- Other activities provide better value for money 其他的活动提供更高的价值
- Access / transport availability 交通 / 运输的可用性
- Too far to travel 太远的旅程
- Too busy with other activities/sightseeing 忙于其他事
- Lack of interest 没兴趣
- Limited time available 时间有限
- Outside my comfort zone (Cultural or language barriers) 感到不舒服（文化或语言阻碍）
- Don't know where to go/what is available/how to book 不知道哪里去 / 有什么 / 怎么预约
- Not available in destinations you are visiting 您游览的目的地没有提供
- Not a high priority (not recommended by others, not prestigious)（别人没推荐，不著名）
- Prefer more adventurous or active activities (not fun / exciting enough) 比较喜欢惊险或积极的活动（不够好玩 / 不够精彩）
- Worried about safety or food 对于安全或食品感到担忧
- Not authentic

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

27. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

28. The next experience I would like you to consider is staying overnight in a remote Aboriginal Community or on Aboriginal Land. This may be in budget or mid-range accommodation with shared facilities. For example, staying in a Safari Tent with a shared bathroom.

夜宿在一个偏远的原住民/土著社区或土地。这可能是一个共用设施的经济或中档的住宿。例如，一间需要共用浴室的帐篷。

Please rate how appealing staying overnight in a remote Aboriginal Community or on Aboriginal owned land is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

29. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

International and Domestic Visitor Survey

30. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

31. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

International and Domestic Visitor Survey

32. Which of the following factors are impacting your ability or preferences to stay overnight in a remote Aboriginal Community or on Aboriginal Land?

以下哪些因素影响了您夜宿在一个偏远的原住民/土著社区或土地的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

33. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

34. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Stay overnight in a remote Aboriginal Community / on Aboriginal Land

35. Why is staying overnight in a remote Aboriginal Community or on Aboriginal Land unappealing?

夜宿在一个偏远的原住民/土著社区或土地缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

36. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Visit an Aboriginal cultural centre

37. The next experience I would like you to consider is visiting an Aboriginal cultural centre. This will involve viewing displays of photos, art, artefacts and crafts to learn about Aboriginal history, heritage and culture, and the centre is located in a city.

参观原住民/土著的文化中心。位于城市的中心，这会将涉及观赏照片，艺术品，文物和工艺品，并能够了解原住民的历史，传统和文化。

Please rate how appealing visiting an Aboriginal cultural centre is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Visit an Aboriginal cultural centre

38. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Visit an Aboriginal cultural centre

International and Domestic Visitor Survey

39. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

40. Why did you choose to undertake this activity?

您为什么会选择进行这项活动

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Visit an Aboriginal cultural centre

International and Domestic Visitor Survey

41. Which of the following factors are impacting your ability or preferences to visit an Aboriginal cultural centre?

以下哪些因素影响了您参观原住民/土著的文化中心的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Visit an Aboriginal cultural centre

42. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

43. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Visit an Aboriginal cultural centre

44. Why is visiting an Aboriginal cultural centre unappealing?

参观原住民/土著的文化中心缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

45. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes I am going to undertake this activity
- No
- Don't know

Experience an Aboriginal cultural show or performance

46. The next experience I would like you to consider is attending an Aboriginal cultural show or performance as one part of a larger tourist attraction. For example, Dreamworld or Currumbin Wildlife Sanctuary.

参加原住民/土著文化表演或表现的一部分。例如，在梦幻世界（**Dreamworld**）或可伦宾野生动物保护区（**Currumbin Wildlife Sanctuary**）。

Please rate how appealing experiencing an Aboriginal cultural show or performance is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Experience an Aboriginal cultural show or performance

47. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Experience an Aboriginal cultural show or performance

International and Domestic Visitor Survey

48. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

49. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Experience an Aboriginal cultural show or performance

International and Domestic Visitor Survey

50. Which of the following factors are impacting your ability or preferences to experience an Aboriginal cultural show or performance?

以下哪些因素影响了您参加原住民/土著文化表演或表现的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Experience an Aboriginal cultural show or performance

51. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

52. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Experience an Aboriginal cultural show or performance

53. Why is experiencing an Aboriginal cultural show or performance unappealing?

参加原住民/土著文化表演或表现缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

54. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Stay overnight in a luxury cabin on Aboriginal land

55. The next experience I would like you to consider is staying overnight in a luxury cabin on Aboriginal land. This luxury cabin is located on a remote beach with private facilities.

在原住民/土著土地上的豪华客舱过夜。这家豪华的客舱位于一个偏远的海滩，并提供私人的设施。

Please rate how appealing staying overnight in a luxury cabin on Aboriginal land is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Stay overnight in a luxury cabin on Aboriginal land

56. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Stay overnight in a luxury cabin on Aboriginal land

International and Domestic Visitor Survey

57. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

58. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Stay overnight in a luxury cabin on Aboriginal land

International and Domestic Visitor Survey

59. Which of the following factors are impacting your ability or preferences to stay overnight in a luxury cabin on Aboriginal land?

以下哪些因素影响了您在原住民/土著土地上的豪华客舱过夜的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Stay overnight in a luxury cabin on Aboriginal land

60. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

61. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Stay overnight in a luxury cabin on Aboriginal land

62. Why is staying overnight in a luxury cabin on Aboriginal land unappealing?

在原住民/土著土地上的豪华客舱过夜缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

63. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Experience an Aboriginal museum display

64. The next experience I would like you to consider is viewing a museum display of Aboriginal history, photos, art, artefacts and crafts, which is one part of a larger museum.

观赏博物馆中陈列的原住民历史，照片，艺术品，文物和工艺品——这是一个较大的博物馆的一部分。

Please rate how appealing experiencing an Aboriginal museum display is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Experience an Aboriginal museum display

65. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Experience an Aboriginal museum display

International and Domestic Visitor Survey

66. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

67. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Experience an Aboriginal museum display

International and Domestic Visitor Survey

68. Which of the following factors are impacting your ability or preferences to experience an Aboriginal museum display?

以下哪些因素影响了您观赏博物馆的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Experience an Aboriginal museum display

69. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

70. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Experience an Aboriginal museum display

71. Why is experiencing an Aboriginal museum display unappealing?

观赏博物馆缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

72. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Full day tour with an Aboriginal Guide

73. The next experience I would like you to consider is 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.

与原住民导游在一辆车里度过一整天的游览。这将涉及标志性景观和旅游景点，如丹翠雨（**Daintree Rainforest**），卡卡杜，大洋路和澳大利亚的阿尔卑斯山。通过游览中，您可以了解原住民的历史，传统和文化。

Please rate how appealing a full day tour with an Aboriginal Guide is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Full day tour with an Aboriginal Guide

74. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Full day tour with an Aboriginal Guide

International and Domestic Visitor Survey

75. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

76. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Full day tour with an Aboriginal Guide

International and Domestic Visitor Survey

77. Which of the following factors are impacting your ability or preferences to go on a full day tour with an Aboriginal Guide?

以下哪些因素影响了您与原住民导游在一辆车里度过一整天的游览的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Full day tour with an Aboriginal Guide

78. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

79. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Full day tour with an Aboriginal Guide

80. Why is going on a full day tour with an Aboriginal Guide unappealing?

与原住民导游在一辆车里度过一整天的游览缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

81. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Half day adventure activity with an Aboriginal guide

82. The next experience I would like you to consider is joining an Aboriginal guide for a half day adventure activity. For example, Four Wheel Driving, Mud Crabbing, Fishing or Kayaking.

加入与原住民导游的半天冒险活动。例如，四轮驱动，泥捕蟹，钓鱼或划皮艇。

Please rate how appealing a half day adventure activity with an Aboriginal guide is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Half day adventure activity with an Aboriginal guide

83. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Half day adventure activity with an Aboriginal guide

International and Domestic Visitor Survey

84. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

85. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Half day adventure activity with an Aboriginal guide

International and Domestic Visitor Survey

86. Which of the following factors are impacting your ability or preferences to go on a half day adventure activity with an Aboriginal guide?

以下哪些因素影响了您加入与原住民导游的半天冒险活动的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Half day adventure activity with an Aboriginal guide

87. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

88. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Half day adventure activity with an Aboriginal guide

89. Why is going on a half day adventure activity with an Aboriginal guide unappealing?

加入与原住民导游的半天冒险活动缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

90. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Visit remote Aboriginal rock paintings or carvings

91. The last experience I would like you to consider is visiting a remote outback location to see Aboriginal rock paintings or carvings.

游览远程的内陆位置，参观原住民的岩石绘画或雕刻。

Please rate how appealing visiting remote Aboriginal rock paintings or carvings is to you:

请您评估这项活动的吸引力：

- Not appealing
- Slightly appealing
- Somewhat appealing
- Very appealing
- Extremely appealing
- Other (short)

Visit remote Aboriginal rock paintings or carvings

92. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Visit remote Aboriginal rock paintings or carvings

International and Domestic Visitor Survey

93. How much did you pay for this experience?

为了这方面的经验，您付出了多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

94. Why did you choose to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

Visit remote Aboriginal rock paintings or carvings

International and Domestic Visitor Survey

95. Which of the following factors are impacting your ability or preferences to visit remote Aboriginal rock paintings or carvings?

以下哪些因素影响了您游览远程的内陆位置，参观原住民的岩石绘画或雕刻的偏好设定？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

Visit remote Aboriginal rock paintings or carvings

96. Why have you chosen to undertake this activity?

您为什么会选择进行这项活动？

- Interest in Aboriginal history, culture and traditions 对于土著历史，文化与传统感到兴趣。
- Value for money 无有所值
- Convenient location 地点方便
- Part of a tour itinerary 旅游行程的一部分
- Spur of the moment decision 一时兴起的决定
- Other people I am travelling with wanted to undertake this activity 和我一起旅游的人想进行这项活动
- It was recommended to me 被人推荐

Other (please specify) 其他 (请注明)

International and Domestic Visitor Survey

97. How much would you pay for this experience?

为了这方面的经验，您愿意付出多少钱？

- Free
- \$1-\$50
- \$51-\$100
- \$101-\$200
- \$201-\$500
- \$501-\$1,000
- More than \$1000

Visit remote Aboriginal rock paintings or carvings

98. Why is visiting remote Aboriginal rock paintings or carvings unappealing?

参观原住民的岩石绘画或雕刻缺乏吸引力的原因是什么？

- Activity is too expensive/limited budget
- Other activities provide better value for money
- Access/transport availability
- Too far to travel
- Too busy with other activities/sightseeing
- Lack of interest
- Limited time available
- Outside my comfort zone (Cultural or language barriers)
- Don't know where to go/what is available/how to book
- Not available in destinations you are visiting
- Not a high priority (not recommended by others, not prestigious)
- Prefer more adventurous or active activities (not fun / exciting enough)
- Worried about safety or food
- Not authentic

Other (please specify)

International and Domestic Visitor Survey

99. Have you or are you going to undertake this activity?

您有没有 / 会不会进行这项活动？

- Yes, I have undertaken this activity
- Yes, I am going to undertake this activity
- No
- Don't know

Demographics

100. What is your gender?

您的性别是什么？

- Male
- Female

101. Which of these age groups do you fall within?

您属于哪一个年龄组？

- | | |
|---|---|
| <input type="radio"/> 15 to 19 years 十五到十九岁 | <input type="radio"/> 50 to 54 years 五十到五十四岁 |
| <input type="radio"/> 20 to 24 years 二十到二十四岁 | <input type="radio"/> 55 to 59 years 五十五到五十九岁 |
| <input type="radio"/> 25 to 29 years 二十五到二十九岁 | <input type="radio"/> 60 to 64 years 六十到六十四岁 |
| <input type="radio"/> 30 to 34 years 三十到三十四岁 | <input type="radio"/> 65 to 69 years 六十五到六十九岁 |
| <input type="radio"/> 35 to 39 years 三十五到三十九岁 | <input type="radio"/> 70 to 74 years 七十到七十四岁 |
| <input type="radio"/> 40 to 44 years 四十到四十四岁 | <input type="radio"/> 75 to 79 years 七十五到七十九岁 |
| <input type="radio"/> 45 to 49 years 四十五到四十九岁 | <input type="radio"/> 80 or more years 八十岁以上 |

Survey Close

102. Do you have any comments about this survey or Aboriginal tourism in Australia?

您对这次的调查或在澳洲里头的原住民旅游有任何意见？

Thank you very much for your participation in this survey!

Author Vitae

Dr Lisa Ruhanen is a Senior Lecturer and the Director of Tourism Postgraduate Coursework Programs with the UQ Business School, The University of Queensland. Her research interests include Indigenous tourism, sustainable tourism destination policy and planning, and climate change. She has been involved in some 30 academic and consultancy research projects in Australia and overseas and has worked extensively as a consultant, external collaborator and executive committee member with a variety of divisions of the United Nations World Tourism Organization. In 2010 Lisa was awarded a fellowship under the Oxford Brookes University International Visiting Fellow Scheme in the United Kingdom.

Dr Michelle Whitford is a Senior Lecturer and Higher Degree Research Convenor in the Department of Tourism, Sport and Hotel Management. Her research expertise is in the field of event policy and planning and Indigenous tourism and events. Dr Whitford's research work includes co-coordinating projects in the area of Indigenous tourism and events with a focus on supply and demand, capacity development, entrepreneurship, authenticity and commodification and management. She has also co-coordinated research projects for various organisations including the Sustainable Tourism Cooperative Research Centre, the Australian Institute of Aboriginal and Torres Strait Island Studies and numerous Australian Government agencies.

Dr Char-lee McLennan is a Research Fellow with the Centre for Tourism, Sport and Services Research at Griffith University, Gold Coast, Australia. Her research interests include tourism transformation theory, destination development and evolution; institutional development; tourism policy and planning; sustainable tourism; indigenous tourism; and scenario modelling. Char-lee is the recipient of the 2013 Emerald/EFMD Outstanding Doctoral Research Award in the Hospitality Management category, the 2012 UQ Dean's Award for Research Higher Degree Excellence and the 2012 Best Paper Award from the Journal of Hospitality and Tourism Research.

Author Photos



Dr Lisa Ruhanen



Dr Michelle Whitford



Dr Char-lee McLennan