

National demand for cultural tourism in Australia

DEPARTMENT OF
TOURISM AND CULTURE



Introduction

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Both Indigenous and non-Indigenous culture has consistently been identified as a potential trigger for domestic holidays to the Northern Territory. In January 2017, Tourism NT contracted Instinct and Reason to conduct strategic research on this topic to identify opportunities that would allow the Northern Territory to raise the profile of its cultural offering for Australians and attract more visitors. In particular, to better understand the level of demand for experiencing culture whilst holidaying in Australia, the types of desired cultural experiences and activities as well as the triggers that would attract more visitors.

Research Approach

The findings in this report were obtained from both qualitative and quantitative studies of Australians open to visiting the Northern Territory. The first stage was exploratory in nature and employed qualitative methods to understand perceptions about Aboriginal culture and uncover experiences and offers, which would attract visitors. The second stage adopted quantitative methods to size interest in the NT and different cultural experiences.

Qualitative exploration

Four mini-groups were conducted with n=6 participants in each group. Interstate participants were either open to visiting the NT, considering or intending to visit in the next twelve months.

Quantitative modelling

A survey employing an online questionnaire and an experimental choice model design was used, with a sample of n=400, 18-70 year olds achieved. Participants were screened to ensure they were open to visiting the NT, had travelled interstate for leisure for two nights or more within the last two years, and were interested in experiencing culture when travelling.

Research findings

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Attitudes and perceptions

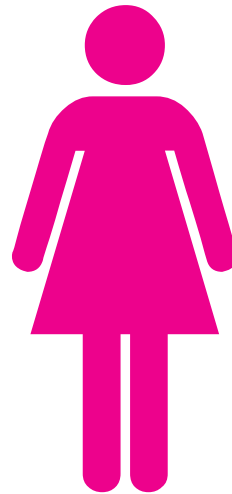
- Experiencing a different culture is considered to be a key aspect of a holiday. Australians, however, do not immediately perceive different destinations throughout Australia to provide a sufficient range of cultural diversity to justify travelling for this reason.
- Culture makes a destination authentic – it represents the unspoiled nature of the destination and its personality. Genuine interactions with locals are perceived as most authentic, while ‘staged’ culture is a turn-off and easily spotted.
- People want opportunities to experience culture but have varying levels of how they want to do this – based on their comfort levels.
- Depending on the level of desired cultural engagement, three segments emerged referred to in this study as ‘Observers’, ‘Intrigued’ and ‘Immersives’.



44 AVERAGE AGE
35% 18-34, 34% 55-70

Observers - approx 12.4% of the interstate population.

More interested in the overall tourism experience. Culture is a by-product of travelling to another place.



43%

63% Married, 21% Single



57%



prefer culture from a distance



take photos for later



Look to museums for cultural engagement

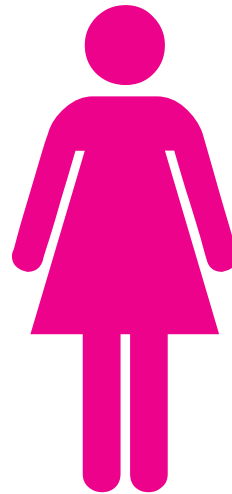


48

AVERAGE AGE
35% 18-34, 34% 55-70

Intrigued - approx **12.4%** of the interstate population

Interested in visiting friends and connecting yet non confrontational cultural experiences.



55%



45%

70% **Married**, 17% **Single**



Want a blend of comfort and challenge



Prefer short cultural experiences



Planned and considered as part of travel



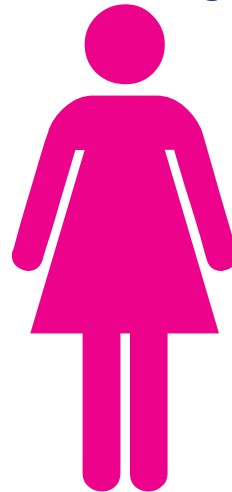
41

AVERAGE AGE

38% 18-34, 21% 55-70

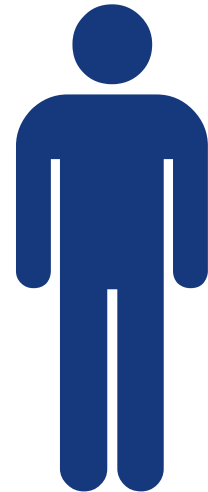
Immersive - approx **13.9%** of the interstate population

Expect holidays to provide opportunity to participate in events, learn and experience another culture and learn something about themselves



56%

60% **Married**, 26% **Single**



44%



Want to build memories and live in the moment



Prefer longer cultural experiences



Personal connection, to learn, to make something

Aboriginal cultural experiences on an Australian holiday

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33% Of Interstate population are interested in cultural experience when on holiday

Aboriginal culture can be polarising in Australia. Some have stereotypical views while others are in wonder of its breadth and heritage.

67% want to visit sacred rock art sites.
47% are willing to pay.

64% want to learn about Aboriginal beliefs and connection to land.
39% are willing to pay.

60% want to hear stories about the Dreamtime.
36% are willing to pay.

- **Immersives** - keen to participate in involving experiences such as attending ceremonies/dances and hearing stories about the dreamtime.
- **Observers** - interested in learning about Aboriginal beliefs, the stolen generation, visiting sacred rock sites and cultural centres.
- **Intrigued** - more interested in learning about bush tucker/hunting, taking workshops or watching an Aboriginal artist.

Aboriginal cultural experiences in the Northern Territory

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Australians intending to visit the NT have a deeper appreciation for Aboriginal culture.

85%

of respondents believed that the NT was the best place to experience the Aboriginal culture



Intrigued & Immersives - most interested in such an experience in the NT

NT's culture could be experienced at a variety of locations

