

VISITOR EXPERIENCE AND EXPECTATIONS RESEARCH (VEER) 2019-20 - ABORIGINAL TOURISM

July 2020

BACKGROUND AND METHODOLOGY



Objective

The research objective was to better understand visitor experiences in Western Australia. The survey measured visitors experiences, expectations and general thoughts of WA and their holiday



Sample

The survey involved 270 face to face intercept interviews with international and interstate visitors on holiday in WA for 2 or more nights, and Western Australian residents who were currently on a WA short break/holiday or who had holidayed in WA in the past 6 weeks.



Timeline

Fieldwork was conducted by Thinkfield in 2019-20 in two waves over the course of the year from October 2019 to February 2020.



Comparison

Significant difference testing has been included throughout this report. The **green** squares /upward pointing arrows represent a significantly higher score and the **red** squares/downward pointing arrows represent a significantly lower score at 95% confidence level. Significant difference testing has been shown between years and 2019-20 total against visitor type subgroups.

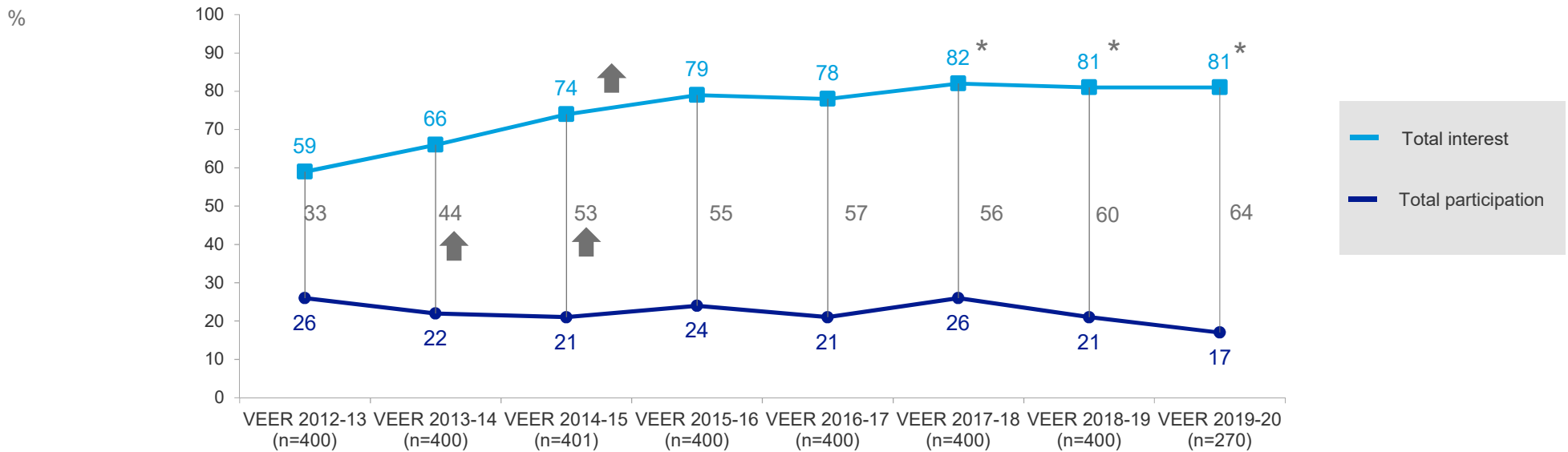
Sample Structure

Interview Location	Total	Intrastate	Interstate	International
City of Perth	55	7	24	24
Perth Visitor Centre	43	6	14	23
Elizabeth Quay	41	6	11	24
Fremantle	33	7	10	16
Mandurah	36	27	4	5
Other Perth	62	32	10	20
TOTAL	270	85	73	112

ABORIGINAL EXPERIENCE

Visitor interest in Aboriginal experiences continued to far outweigh participation in the tourism offer in 2019-20. Four in five visitors (81%) would be interested in experiencing an Aboriginal tourism experience or activity if it were easily accessible in WA, however less than one in five visitors (17%) participated in Aboriginal tourism during their WA holiday.

Overall Interest and Participation in Aboriginal Tourism – by Year

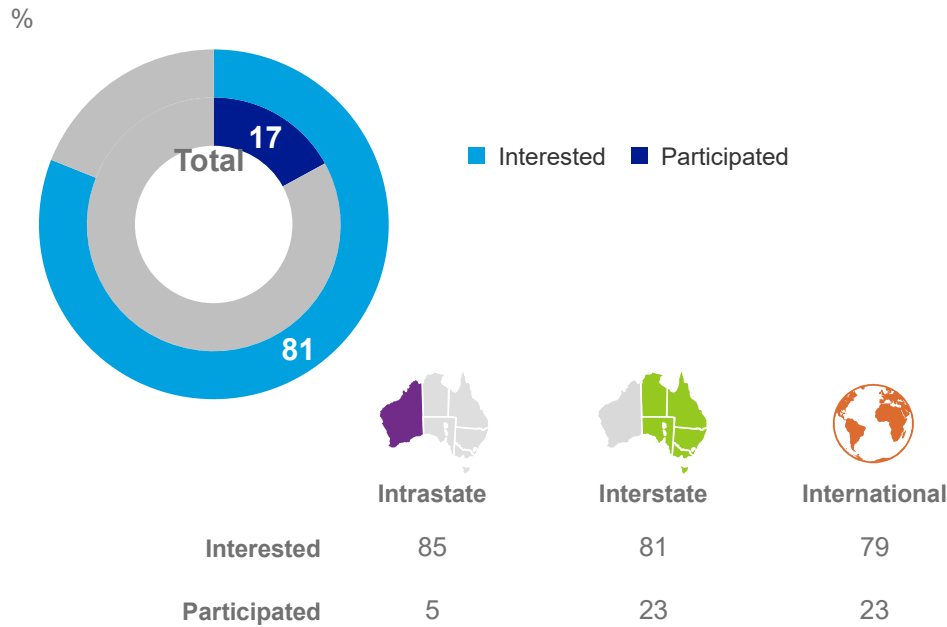


*"Experience Native bush food" was added to list of Aboriginal tourism experiences in 2017-18, which has resulted in a higher result for total interest from 2017-18. If "Experience Native bush food" had not been added, total interest would have been 77% in 2017-18, 78% in 2018-19, and 77% in 2019-20, consistent with previous years.

SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia?
 Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia?
 BASE: All respondents, 2019-20 n=270; 2018-19 n=400; 2017-18 n=400; 2016-17 n=400; 2015-16 n=400; 2014-15 n=401; 2013/14 n=400; 2012-13 n=400.

“Go on a tour with an Aboriginal guide” and “Experience Native Bush Food” generate the most interest, and also the largest gap between interest and participation, indicating a potential opportunity for development. Visiting Aboriginal galleries and seeing art, craft or cultural displays were the most common activities undertaken.

2019-20 Interest and Participation in Aboriginal Tourism – by Visitor Type



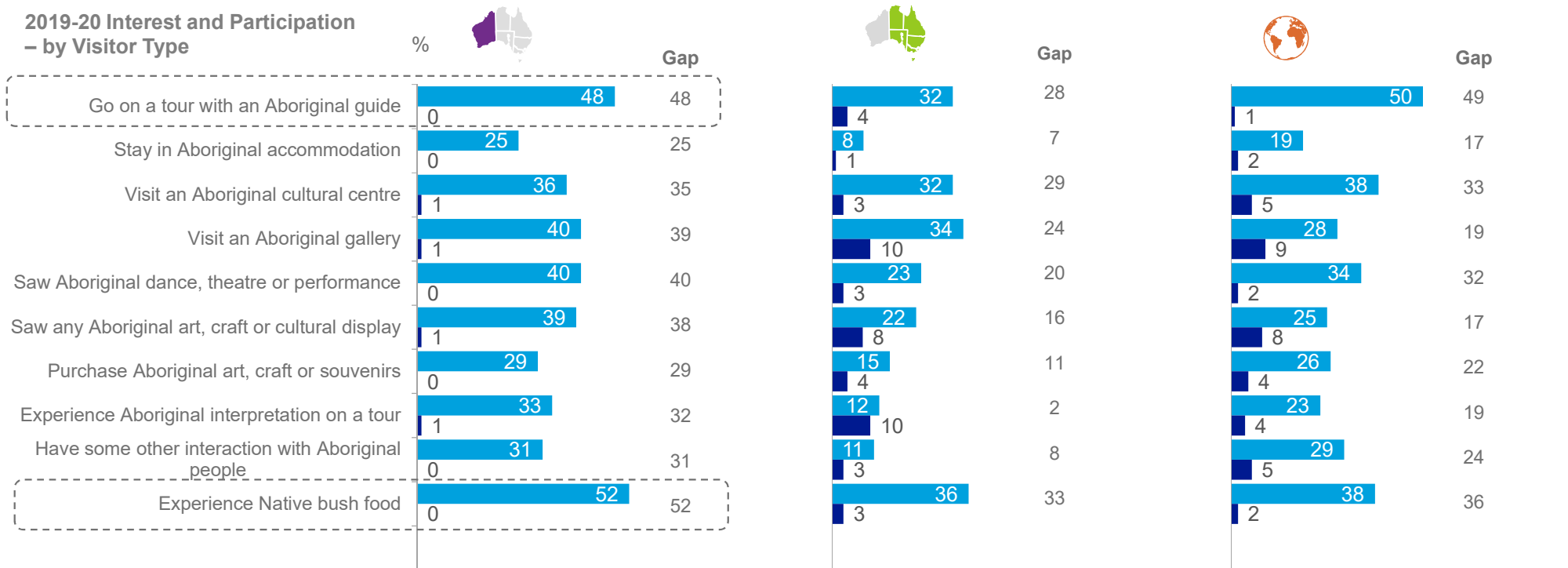
2019-20 Participation in Aboriginal Tourism



SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia?
 Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia?
 BASE: All respondents n=270; Intrastate visitors n=85; Interstate visitors n=73; International visitors n=112.

The gap between interest and participation is most significant for intrastate visitors; they are the most interested audience, yet the one which participates in Aboriginal tourism the least. Across all visitor markets, the types of experiences visitors are more interested in is largely similar – with experiencing native bush food and going on a tour with an Aboriginal guide ranking in the top three most appealing experiences across all three markets.

2019-20 Interest and Participation – by Visitor Type

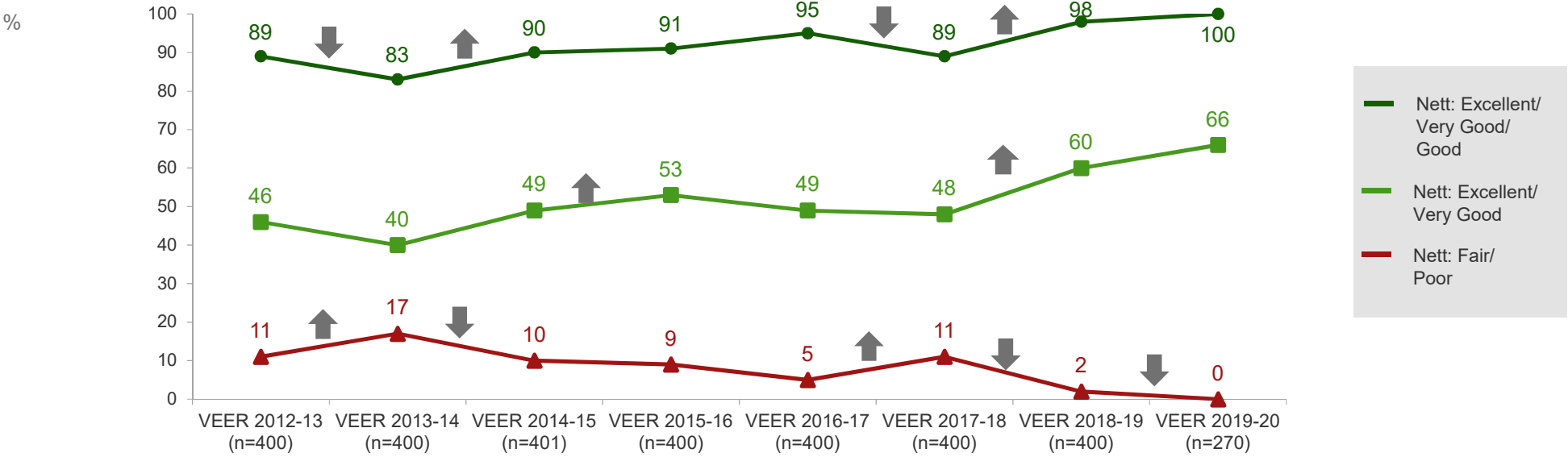


SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia?
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 BASE: All respondents n=270; Intrastate visitors n=85; Interstate visitors n=73; International visitors n=112.

■ Interested ■ Participated

For those visitors who had participated in an Aboriginal activity, satisfaction with the experience was at an all time high. 100% rated their experience as 'excellent', 'very good', or 'good'. This was an increase of 2% points on last year, with a 6% point growth in those visitors rating their experience of 'very good' or 'excellent'.

**Overall Aboriginal Experience
– by Year**

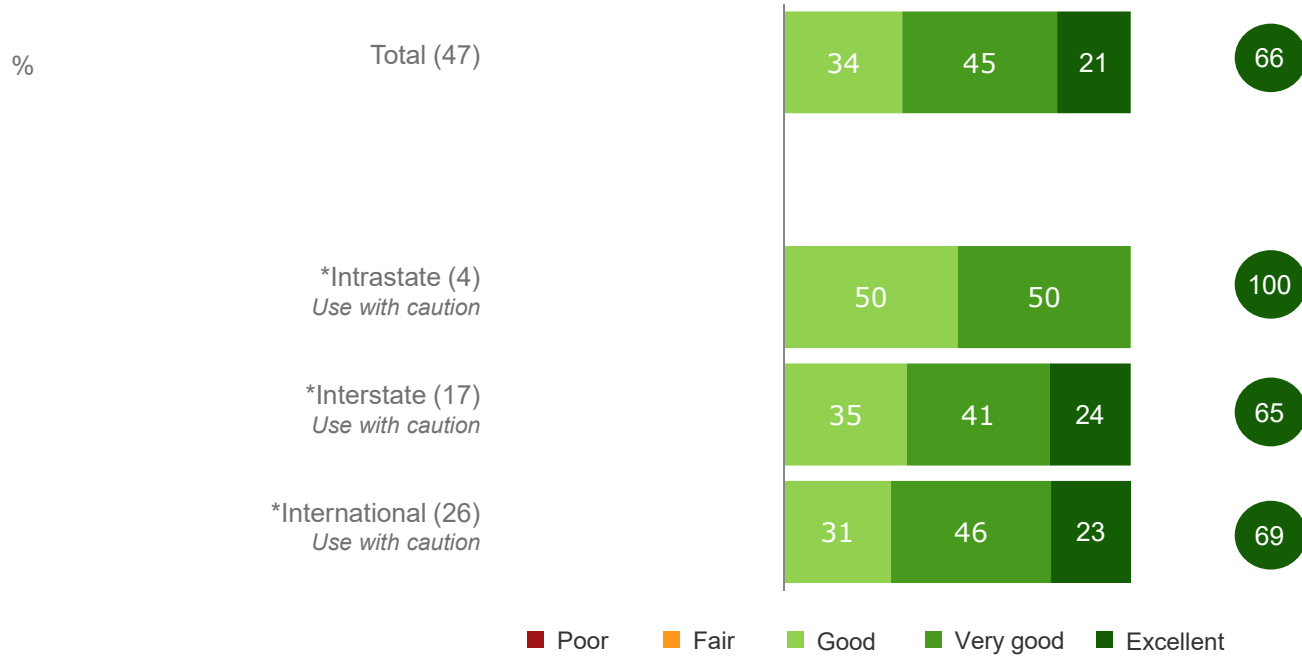


SOURCE: Q14. And using this scale, can you please rate overall the Aboriginal activities and experiences you experienced in Western Australia?
 BASE: All respondents who participated in an Aboriginal activity, 2019-20 n=47, 2018-19 n=83; 2017-18 n=103; 2016-17 n=85; 2015-16 n=95; 2014-15 n=83; 2013-14 n=86; 2012-13 n=102.

Ratings of Aboriginal tourism experiences were high across all three markets.
 (Note: small sample sizes; results are indicative only)

**2019-20 Aboriginal Experience
 – by Visitor Type**

Top 2 Box



SOURCE: Q14. And using this scale, can you please rate overall the Aboriginal activities and experiences you experienced in Western Australia?
 BASE: All respondents n=47; Intrastate visitors n=4; Interstate visitors n=17; International visitors n=26. *Note small sample size

Most participants of Aboriginal tourism found the experience interesting and enjoyed the chance to experience 'something different'. The experiences were perceived as unique and informative. Many mentioned the beauty of Aboriginal artwork.



“Friendliness and openness of the stories we read and were told about the aborigines”

“I like that it was young children displaying the aboriginal culture”

“Lovely art”

“Realizing that there was a lot here before Europeans”

“Took photos to show students at home, very interesting”

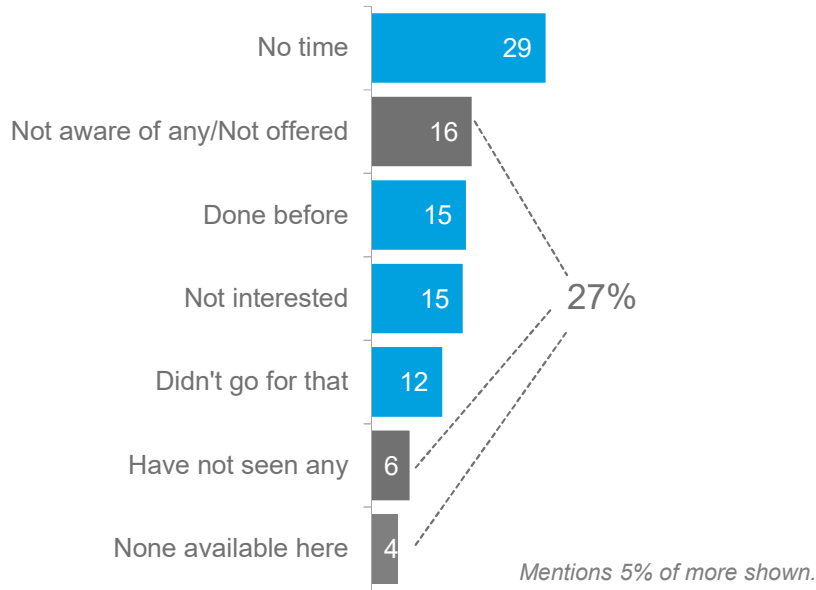
“Very professional, quality of the work”

SOURCE: Q15. What was the main thing that was poor/fair? What was good/excellent? FIRST RESPONSE ONLY
BASE: Respondents who had participated in an Aboriginal activity n=270.
NOTE: Size of the word in the image represents frequency of mentions.

Those who did not participate in Aboriginal tourism cited a lack of time as the main reason. Lack of knowledge and/or availability of Aboriginal tourism experiences is also a significant barrier to participation, with a quarter (27%) saying they have not come across any Aboriginal tourism experiences during their trip.

**2019-20 Deterrent of Aboriginal Experience
– Did not participate**

%



“Didn’t know there were any”

“Lack of time”

“Nothing advertised”

“Have done elsewhere”

“Just not interested”

“Done all before elsewhere”

“No time and I have small children”

SOURCE: Q16. Can I ask why you chose to not participate in Aboriginal activities or experiences? FIRST RESPONSE ONLY
BASE: Respondents who had not participated in an Aboriginal activity n=207.

For those who were not interested in participating in an Aboriginal activity or experience, their main reasons were a lack of enthusiasm and a feeling of *'been there, done that'*. Upselling the breadth and uniqueness of experiences available in WA may help to overcome these barriers.

**2019-20 Deterrent of Aboriginal Experience
– Not interested**

%		
1	Not interested in participating	63%
2	Have had previous experiences	30%
3	Did not have the time to participate	7%

“Just not interested”

“Done it in the past.”

“Just not interested and lack of awareness.”

“Saw in NT.”

“Don’t like set tours etc, don’t like crowds

“Already seen them before in central Australia”

SOURCE: Q17. Why are you not interested in participating in an Aboriginal activity or experience in Western Australia?
Why are you not interested in participating in another Aboriginal activity or experience in Western Australia?
BASE: Respondents who were not interested in an Aboriginal activity n=43.

For further information, contact:

research@westernaustralia.com

