

Building knowledge for Aboriginal and Torres Strait Islander remote tourism Key visitor markets and opportunities in remote Australia

Damien Jacobsen

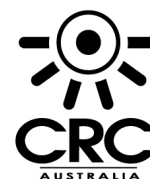
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Executive summary

This report was developed as part of the CRC for Remote Economic Participation (CRC-REP) Aboriginal and Torres Strait Islander Tourism Product project. It provides an overview of various visitor markets relevant to remote Aboriginal and Torres Strait Islander people involved in tourism. The report accumulates this information for CRC-REP stakeholders to update existing market knowledge and stimulate remote Aboriginal and Torres Strait Islander people to consider broad development opportunities based on accessible visitor segments. The report divides the market descriptions into two categories: Aboriginal and Torres Strait Islander tourism, and remote tourism. The third section of the report provides a snapshot of visitor segments in three different destination regions of remote Australia.

Aboriginal and Torres Strait Islander tourism market segments include international and domestic visitors, with the key international visitor markets including Germany, Japan, the United Kingdom, the United States and South Korea. Visitor numbers from many of these countries have reduced in recent years, and overall international Aboriginal and Torres Strait Islander tourism visitor numbers have also declined. However, there has been growth in visitors from China. Statistics and research about domestic markets for Aboriginal and Torres Strait Islander tourism show that this segment has also recorded a downward trend in recent years. Other challenges for the domestic market include matching Aboriginal tourism experiences with domestic visitor expectations.

The report also draws attention to a range of remote tourism visitor segments, including four-wheel drivers, caravanners and campers, grey nomads, volunteers, wildlife visitors, fishing enthusiasts and ecotourists. The needs of each segment offer diverse tourism development opportunities, and the information in this report may stimulate Aboriginal and Torres Strait Islander people involved in tourism to cater to segments accessible in their regions. Finally, the report discusses visitor segments in three destination regions of remote Australia. It highlights that while different regions can share some visitor segments, the diversity of remote Australia requires decision making that combines localised insight with an understanding of remote tourism.

Although it presents a brief outline of many remote visitor segments, this report is unable to specify visitor segments and tourism initiatives relevant to every destination region of remote Australia, because decision makers must determine the unique tourism potential specific to their region.

1. Introduction

This report provides a review of statistics and research relevant to remote Aboriginal and Torres Strait Islander people involved in tourism. The report presents figures from a range of sources that discuss some of the key traveller segments in remote Australia. These descriptions may encourage Aboriginal and Torres Strait Islander people involved in remote tourism to consider a range of issues and challenges related to participating in tourism. The report is divided in two main sections. The first section covers recent market statistics related to Aboriginal and Torres Strait Islander tourism, providing a snapshot which also gives insight to areas for future research. The second section covers a range of tourism markets associated with tourism in remote Australia.

2. Tourists in remote Australia: Aboriginal and Torres Strait Islander tourism and remote tourism

The statistics are divided into two categories (visitation linked to Aboriginal and Torres Strait Islander tourism and visitation associated with remote tourism) to reflect various development and participation options available to remote Aboriginal and Torres Strait Islander people. Many authors categorise Aboriginal and Torres Strait Islander tourism as ‘Indigenous tourism’ and define it as ‘tourism activity in which Indigenous people are directly involved either through control and/or by having their culture serve as the essence of the attraction’ (Butler & Hinch 1996, p. 9). In the present report, the term ‘Aboriginal and Torres Strait Islander tourism’ will be used instead of ‘Indigenous tourism’. This report will discuss visitation linked to Aboriginal and Torres Strait Islander tourism by highlighting the international and domestic markets for this tourism. Visitation associated with remote tourism, on the other hand, includes discussion of a range of visitor segments in remote Australia that provide tourism opportunities and challenges for remote Aboriginal and Torres Strait Islander people.

By reviewing Aboriginal and Torres Strait Islander tourism and remote tourism market segments, one aim of this report is to highlight the various market opportunities available to remote Aboriginal and Torres Strait Islander people involved in tourism. The statistics and data briefly reviewed in this report highlight some of the key sources of information currently available to remote Aboriginal and Torres Strait Islander people. Much of the information discussed in this report is from sources intended for a general tourism industry audience, hence the application of some information specifically to remote Aboriginal and Torres Strait Islander contexts in this report may in some cases be unusual. An important role of this report is to assess how existing research and information (in its present form) meets and targets the needs of remote Aboriginal and Torres Strait Islander people. This background will help to identify gaps in the existing research to determine future research needs for remote Aboriginal and Torres Strait Islander people involved in tourism.

3. Aboriginal and Torres Strait Islander tourism markets

3.1 Aboriginal and Torres Strait Islander tourism and international visitors

The 2011–2012 figures released by Tourism Australia (TRA 2012a) indicate that Australian inbound tourism had continued on an upwards trend of recovery. A milestone of 6 million arrivals in 2011–2012 exceeded the previous high of 5.9 million in 2010 (TA 2011). This new benchmark comes in the wake of downturns created by global events such as the 2008 global financial crisis, the Iceland volcanic eruptions and swine flu concerns. Visitor numbers increased from several major markets (including India, Indonesia and France), but the highest growth in visitor numbers in 2011–2012 came from China. Even though inbound travel from the United States had dropped 1.6% in 2010, Tourism Australia expects that initiatives such as the Oprah Winfrey Ultimate Australian Adventure will stimulate visitation by American tourists.

Targeting international visitors has been an ongoing impetus behind Aboriginal and Torres Strait Islander tourism and development. This is largely a by-product of the role Aboriginal and Torres Strait Islander culture plays in Australia's national tourism product. The 2003 Tourism White Paper indicated that 'international visitors are clearly interested in experiencing these cultures but, at this stage, our tourism industry has not been able to develop sufficient Indigenous tourism product to meet that demand' (Commonwealth of Australia 2003, p. 31). An objective of the more recent Tourism 2020 initiative is to increase Aboriginal tourism products, skills and labour (TRA 2012a). Outcomes from the work may be released in 2013 (TRA 2012a). Research in 2012 indicates that Aboriginal culture rates 15th out of 19 features that international visitors considered most appealing about Australia (TRA 2012b). International tourist participation in Aboriginal tourism has been in decline from 18% of overall international visitors in 2006 to 14% in 2009 (TRA 2009). Experiencing an art, craft or cultural display is the most common activity for international visitors. Almost half of the market is made up of European visitors, with visitors from the United States and China comprising large proportions of the remaining participants.

A brief overview will now be provided of some key international markets for Aboriginal and Torres Strait Islander tourism.

3.1.1 Germany

According to Tourism Australia there are several key German target market segments (including Self-challengers, Cocoon Travellers, Comfort and Learning, Taste and Try and Pushing Boundaries), but of these, Comfort and Learning and Self-challengers are the greatest potential market segments:

- Comfort and Learning: Making up 14% of the German market, this segment 'keep learning, security, comfort and enjoying in balance' (TA 2007, p. 10).
- Self-challengers: Accounting for 12% of the German market, the best way to describe this segment is that 'travel fulfils an inner drive to challenge themselves and the reward is intensely personal' (TA 2007, p. 6). This segment is 'drawn to the natural phenomena and Indigenous culture that Australia has to offer' (TA 2007, p. 6).

Table 1: Germany – Main Australian tourism segments

	Comfort and Learning	Self-challengers
% Overall German outbound market	14	12
Age	More likely older travellers	18–75
Travel profile	Organised tour	Alone or with friends
Average stay	Short stays	33 days
Preferred accommodation	Luxury hotel	Budget/camping
Main activities	Wildlife, landscapes, guided tours	Culture, wildlife, photography
Main source of information	Travel agent, newspaper, TV	Internet, magazines, travel guides

(Source: TA 2007)

Table 1 shows that the Comfort and Learning segment are typically high-end visitors who often plan and travel using organised tours. Self-challengers, on the other hand, plan and travel independently for extended periods alone or with friends. Both segments have relatively similar interests; however, the way these features are experienced varies between the two. After a period of steady visitation between 2008 and 2010 (155,000, 156,000 and 155,000 visitors per year respectively) visitation from Germany fell to 149,000 in 2011 (TRA 2011a). From 2007 to 2011 German visitors accounted for 3% of overall international visitors to Australia (TRA 2011a).

3.1.2 Japan

The key market segments for Japan are Self-challengers, Cultural Explorers, Travel in Style, Collectors and First Timers; of these, Self-challengers and Cultural Explorers are the greatest potential target markets (TA 2006a):

- Self-challengers: Accounting for 24% of the Japanese market, for Self-challengers ‘travel fulfils an inner drive to challenge themselves and extend their appreciation and understanding of other cultures’ (TA 2006a, p. 6). Self-challengers ‘are more likely to be interested in the opportunity to learn about the Indigenous culture’ (TA 2006a, p. 6).
- Cultural Explorers: Accounting for 18% of the Japanese market, for Cultural Explorers ‘travel fulfils their desire to understand other cultures and people while not exposing them to the challenges of exploring a destination on their own’ (TA 2006a, p. 8).

Table 2 shows that both segments have interest in cultural experiences and share similar age profiles. Where Cultural Explorers are more likely to prefer luxury accommodation and organised tours, the Self-challengers are more likely to be independent travellers. Tourism Research Australia Statistics show that the decline between 2007 and 2009 (531,000, 424,000 and 332,000 visitors per year respectively) reversed in 2010 (368,000); however, 2011 (305,000 visitors) saw the return of a decline in visitor numbers (TRA 2011a). In 2011, visitors from Japan represented about 6% of international visitors to Australia (TRA 2011a).

Table 2: Japan – Main Australian tourism segments

	Self-challengers	Cultural Explorers
% Overall Japanese outbound market	24	18
Age	45–54	More likely older, married, retired
Travel profile	Alone or with friends	Organised tour, large group
Average stay	High compared to other Japanese segments	High average length of stay
Preferred accommodation	With friends, budget/camping	Luxury hotel
Main activities	Culture, visit friends, extreme sports, backpacking	Icons/landmarks, museums, national parks, culture
Main source of information	Internet, newspapers, magazines	Travel agent, newspaper, TV

(Source: TA 2006a)

3.1.3 United Kingdom

According to Tourism Australia the key market segments for the UK are Self-challengers, Comfort Adventurers, Cocoon Travellers, Taste and Try and Pushing Boundaries; of these, Comfort Adventurers, Self-challengers and Cocoon Travellers are the greatest potential target markets (TA 2006b):

- Comfort Adventurers: Making up around 18% of the UK market, Comfort Adventurers ‘seek to experience the unique and unusual without compromising their creature comforts’ (TA 2006b, p. 8).
- Self-challengers: This segment accounts for about 12% of the UK market; for them, ‘travel fulfils a personal drive to challenge themselves and the reward is intensely personal’ (TA 2006b, p. 6). Self-challengers ‘exhibit no major barriers to visiting Australia; moreover, they are attracted by the natural environment, people and Indigenous culture and are highly knowledgeable of Australia as a holiday destination’ (TA 2006b, p. 6).
- Cocoon Travellers: Accounting for 12% of the UK market, Cocoon Travellers perceive that ‘superior holiday experiences are personally satisfying and affirm their status as travellers’ (TA 2006a, p. 11).

Table 3: United Kingdom – Main Australian tourism segments

	Comfort Adventurers	Self-challengers	Cocoon Travellers
% Overall UK outbound market	18	12	12
Age	Average around 40 years old	18–75	More likely empty nesters
Travel profile	More likely with spouse	Alone or with friends	More likely with spouse
Average stay	Average 2 weeks	3–8 weeks	Average 2 weeks
Preferred accommodation	Luxury hotel	Budget/mid-range accommodation	Moderate to luxury hotel, with family
Main activities	Food and wine, events, hiking, shopping	Hiking, wilderness, culture	Food and wine, events, hiking, shopping, golf
Main source of information	Newspaper, magazine, word of mouth	Internet, word of mouth, TV, newspaper	Newspaper, travel agents, internet

(Source: TA 2006b)

Table 3 shows that the segments are in the 40 years or above age group, except that younger sub-groups such as backpackers are likely to be included in the Self-challengers segment. Table 3 suggests that the Self-challengers are the most likely to have an interest in cultural experiences. Statistics from Tourism

Australia show that the UK market has continued a steady decline from 2007 to 2011 (643,000, 632,000, 625,000, 609,000 and 574,000 visitors per year respectively) (TRA 2011a). In 2011, visitors from the UK accounted for 11% of all visitors to Australia (TRA 2011a).

3.1.4 United States

According to Tourism Australia the key market segments for the United States include Self-challengers, Travel in Style, Roots, and Home from Home (TA 2006c). Of these, Self-challengers and Travel in Style are the greatest potential target markets:

- Self-challengers: Making up 33% of the United States market, Self-challengers often hold the perception that ‘travel fulfils an inner drive to challenge myself and is an affirmation of my identity’ (TA 2006c, p. 6).
- Travel in Style: Accounting for 27% of the overall United States market, this segment perceives that ‘superior vacation experiences are satisfying but they also affirm status’ (TA 2006c, p. 8).

Table 4: United States – Main Australian tourism segments

	Self-challengers	Travel in Style
% Overall US outbound market	33	27
Age	18–75 years	18–75 years (more likely 18–24)
Travel profile	Often travel alone	More likely as organised tour
Average stay	High average length of stay	Usually less than 4 weeks
Preferred accommodation	Budget hotels, camping, staying with friends	Resort hotels, cruise ship
Main activities	Cultural events, historic sites, nature experiences, hiking, local culture	Sightseeing, cruises, health spas, golf
Main source of information	Internet, travel magazines	Travel agents, television, newspaper travel section

(Source: TA 2006c)

Table 4 shows that Self-challengers are likely to participate in cultural events and to experience local culture, whereas the Travel in Style segment are more likely to prefer health spas, sightseeing, cruises and golf. Travel in Style visitors may have a higher preference to travel in organised groups than Self-challengers, who may prefer independent travel. United States visitation trends from 2007 to 2011 show that after growth in 2009 (450,000 visitors), numbers have returned to 2007 and 2008 levels of 429,000 visitors (TRA 2011a). United States visitors account for around 8% of all international visitation to Australia (TRA 2011a).

3.1.5 South Korea

According to Tourism Australia the key market segments for South Korea include Adventure Seekers, Family Focus, Comfort Tourists and Functional Travellers; of these, Functional Travellers, Family Focus and Adventure Seekers are the greatest potential target markets (TA 2009):

- **Functional Travellers:** Making up 38% of the South Korean travel market, Functional Travellers feel that ‘holidays provide a sense of relaxation and an opportunity to enjoy new experiences outside of their daily routine without the stress involved of planning it themselves’. (TA 2009, p. 12).
- **Family Focus:** Accounting for 30% of the South Korean market, Family Focus travellers seek ‘family connection and learning through travel’ (TA 2009, p. 8).
- **Adventure Seekers:** Accounting for 19% of the South Korean market, Adventure Seekers are ‘world citizens travelling to learn and experience the diversity and adventure on offer outside Asia’ (TA 2009, p. 6).

Table 5: South Korea – Main Australian tourism segments

	Functional Travellers	Family Focus	Adventure Seekers
% Overall South Korean outbound market	38	30	19
Age	More likely older Travellers	35–49	18–34
Travel profile	More likely with family	Family group	Alone, customised package, with friends
Average stay	-	Often within school holidays	Long stay, including working holiday
Preferred accommodation	Moderate to luxury hotel	Moderate to luxury hotel	Moderate hotel, B&B, Guesthouse
Main activities	Historical places, nature, museums, photography	Historical places, museums, children’s activities	Landmarks, off the beaten track, local food and culture
Main source of information	Newspaper, internet, word of mouth, TV	Newspaper, internet, word of mouth, TV	Newspaper, travel sites, social networking, reviews

(Source: TA 2009)

Visitation from South (and North Korea) has been in steady decline since 2007 (TRA 2011a). After a sharp fall in 2009 to 168,000 visitors (compared with 202,000 visitors in 2008), visitor numbers increased to 199,000 in 2010, but then fell again in 2011 to 183,000 (TRA 2011a). Visitors from South and North Korea account for around 3% of all visitors to Australia (TRA 2011a).

3.1.6 China

According to Tourism Australia the key market segments for China are Self-challengers, Family Connections, Sightseers, Ready to Leave and Close to Home (TA 2006d); of these, Self-challengers and Sightseers are the greatest potential target markets. These include:

- **Self-challengers:** Accounting for 22% of the Chinese market, Self-challengers have ‘an inner drive to immerse themselves in other cultures through travel and learn about themselves and the world’ (TA 2006b, p. 6).
- **Sightseers:** Making up around 18% of the Chinese market, Sightseers prefer ‘the guarantee of seeing world famous sights in a comfortable, secure fashion and the public status that this confers’ (TA 2006b, p. 12).

Table 6: China – Main Australian tourism segments

	Self-Challengers	Sightseers
% Overall Chinese outbound market	22	18
Age	25–34	Average around 38 years old
Travel profile	More likely travel alone	More likely as organised tour
Average stay	(n/a)	Highest average stay of Chinese segments
Preferred accommodation	Moderate to luxury hotels	Moderate to luxury hotels
Main activities	Nightlife, water sports, local culture	Shopping, nightlife, wildlife experiences, landmarks, historic sites
Main source of information	Internet, travel books, word of mouth	Word of mouth, magazines, tour operators

(Source: TA 2006b)

Table 6 shows that while there are differences in the travel profile of these segments, the main activities are relatively similar. For both segments, however, the potential for interest in Aboriginal Tourism experiences is unclear. Statistics from 2007 to 2011 (TRA 2011a) show an upward trend of visitation from China (340,000, 338,000, 351,000, 431,000 and 513,000 visitors per year respectively). Figures from 2012 show that Chinese visitors totalled 573,071 to become Australia's second largest inbound tourism market behind New Zealand (TRA 2012c). A 2012 report highlights that the growth in Chinese visitors is playing an important role in Asian visitor growth for the Australian tourism industry; from 2009 to 2012 visitors from China increased by 217,000, far more than the second largest Asian growth market (Singapore), which recorded growth of 34,000 visitors for the same period (TRA 2012a).

Australian tourism authorities have responded to this upward trend and built upon industry connections established in the 1990s which culminated in the 2011 launch of the *China 2020 Strategic Plan* (TA 2012). The strategic plan places emphasis on key Chinese target segments that are affluent, experienced travellers who come from cities such as Shanghai or Guangzhou. While Australia compares very favourably to other destinations among Chinese markets (TA 2012), it is unclear how remote Australia and Aboriginal and Torres Strait Islander culture rate outside of iconic and easily accessible destinations.

According to Tourism Australia, factors such as safety and having a laid back and easy-going experience are the top preference for Chinese markets (TA 2012). Chinese travellers rely heavily on organised travel providers and predominantly travel as groups (especially first-time visitors) that include family and friends (TA 2012). While initial findings of the *China 2020 Strategic Plan* will help advise product and experience development, as well as future marketing campaigns, Tourism Australia maintain that further market research is required. State tourism agencies (such as Tourism Queensland, Tourism Western Australia and Tourism Northern Territory) are also building research and industry links with China.

3.2 Aboriginal and Torres Strait Islander tourism and the domestic market

The majority of tourism activity in Australia is travel by Australians. Figures from 2012 indicate a 5.8% increase in 2011–2012 for domestic overnight tourism activity compared to 2010 (TRA 2012b). However, it is important to recognise that this growth is contrary to forecasts of domestic tourism decline (DRET

2010a; Tourism Forecasting Committee 2010), and that statistics for 2009 indicate that previous years have recorded an ongoing downward trend of domestic tourism. The Department of Resources, Energy and Tourism found that between 1998 and 2009 domestic overnight trips have decreased an average of 1.0% per year (DRET 2010b). While statistics for 2010 signalled a change in this trend (TRA 2011b) that has continued into 2011–2012 (TRA 2012c), Tourism Research Australia (TRA 2010a) point out that numerous issues contribute to the declines of recent years, including the strong Australian dollar, consumer perceptions of domestic travel, demographics, changing consumer behaviour, competition and availability of overseas travel.

The statistics are unclear on the actual domestic visitation figures for Aboriginal and Torres Strait Islander tourism. According to TRA (2010b) there were 16 million visitor nights taken by domestic Aboriginal and Torres Strait Islander tourism visitors; however, a more recent report in 2011 reported far fewer visitor nights at 3.1 million (TRA 2011b). In their 2011 research report, Tourism Research Australia (TRA 2011b) highlight that domestic Aboriginal tourism visitation has decreased an average of 19% per year between 2006 and 2010.

The Discussion Paper: National Strategy for Indigenous Tourism 2007–2012. Building a Sustainable Future Through Tourism highlighted a need for both domestic and international market research (Indigenous Tourism Australia 2007). By 2010 Tourism Research Australia had released a publication suggesting marketing approaches targeting the domestic market:

Older Australians (with children no longer living at home), and families with older children were more likely to find Indigenous experiences appealing, as they like the learning aspect.

The main reason that domestic tourists are generally not participating in Indigenous tourism experiences is that Australian holidays are primarily for relaxation. Whilst they don't dislike Indigenous activities, a perception exists that the holiday would not be enjoyable and refreshing. Further, most Australians are very familiar with stereotypical Indigenous experiences such as boomerang throwing and the corroboree, and thus these experiences are often perceived to be mostly inauthentic, clichéd and designed for the international tourist market.

There is an opportunity for Indigenous tourism operators to leverage off the convention and conference market. People on business meeting excursions were one group identified in the research that while they don't participate in many Indigenous tourism activities, there is a real opportunity to use these familiarisations/field trips to create an interest and desire to engage in an Indigenous tourism experience in future personal travels.

(TRA 2010c, p. 2)

The publication points out that domestic tourism markets should be considered as 'potential customers' and recommends particular strategies to attract those visitors. It suggests that marketing should focus on fun activities, where visitors can be involved and have opportunities for learning, and which have qualities such as safety and ease of access. The publication points out, however, that targeting domestic tourists can be a challenge, a caution which corroborates various past studies showing that domestic tourist interest in Aboriginal tourism products is minimal (SATC 1995; Pitcher et al. 1999), while actual participation is often incidental (Ryan & Huyton 2000). In 2009, 0.5% of domestic tourists participated in Aboriginal tourism activities (TRA 2010d). Recent research suggests that while domestic tourists account for up to

71% of all Aboriginal tourism visitors, less than 3% of all domestic tourists might be interested in Aboriginal tourism products or experiences (TRA 2010b).

Other research from 2009 (TRA 2010b) highlights five domestic Aboriginal tourist segments:

- Active NT focused (8%): generally between 35 and 64 years of age, this group typically travel for the purpose of holidaying in family groups, as adult couples as well as with children. This group often stay in their own caravan or camp, sometimes staying in a hotel (TRA 2010b).
- Young singles Indigenous introduction (11%): typically young parents or singles, this group often travel for holiday or study, and stay in standard hotel accommodation or caravan or camp (TRA 2010b).
- Business meeting excursioners (16%): this group often travel alone for business purposes or to attend conventions, are aged from 35 to 64 years, and stay in standard hotel accommodation (four stars or below). The internet is the main source of information for this group (TRA 2010b).
- Retired self-drive (20%): this group are usually older, non-working or retired, and travelling as a couple for the purpose of holiday. This group often travel in their own vehicle, and use standard hotel accommodation or stay in a caravan or camp. The internet or word of mouth through friends or relatives are the main sources of information for this group (TRA 2010b).
- Leisure opportunists (45%): this group often travel for the purposes of holiday or visiting friends and relatives, are aged from 35 to 54 years, and use standard hotel accommodation or stay in a caravan or camp. This group often travel in their own vehicle as a couple or family group and gain information by word of mouth, from the internet or a previous visit (TRA 2010b).

An important consideration about the 2009 figures, however, is that the statistics are based on a range of activities, some of which include ‘purchase an indigenous art or craft’, ‘visit an Indigenous gallery’, ‘go on a tour with an Indigenous guide’, ‘visit an Indigenous cultural centre’, ‘see any Indigenous art, craft or cultural display’ and ‘some other personal interaction with Indigenous people’. Figures reported by Tourism Research Australia indicate that the activity ‘see any Indigenous art, craft or cultural display’ is by far the highest ranked form of participation by domestic tourists (TRA 2010b).

It is unclear whether there is a difference between remote regions and other parts of Australia for marketing Aboriginal and Torres Strait Islander tourism to domestic visitors.

4. Remote tourism

4.1 Tourist visitation in remote Australia

Tourism visitation to remote Australia reflects the overall national visitation patterns, in that travel by domestic tourists is the most common of all travel activity. Research conducted as part of the Tourism 2020 program indicates that while visitors from 11 key international markets (including China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA) rated ‘unspoilt natural wilderness’ as fifth out of 19 features that international visitors considered most appealing about Australia, the ‘Outback/desert’ was rated 16th (TRA 2012b). As shown in Figure 1, the key outback tourism regions, which cover much of remote Australia, received eight times as many domestic travellers as international visitors in 2008/2009. Tourism regions such as Queensland Outback, Outback NSW and Australia’s North West received domestic visitation that far exceeded international visitor numbers (note

that international visitor numbers were not available for Australia's Golden Outback at the time this information was compiled). In other regions, such as Alice Springs, and Outback SA, the difference was less. The only exception in Figure 1 is the Petermann Region of the Northern Territory, offering tourists drawcard landscape attractions such as Uluru and Kings Canyon, where domestic visitation was overshadowed by international visitation.

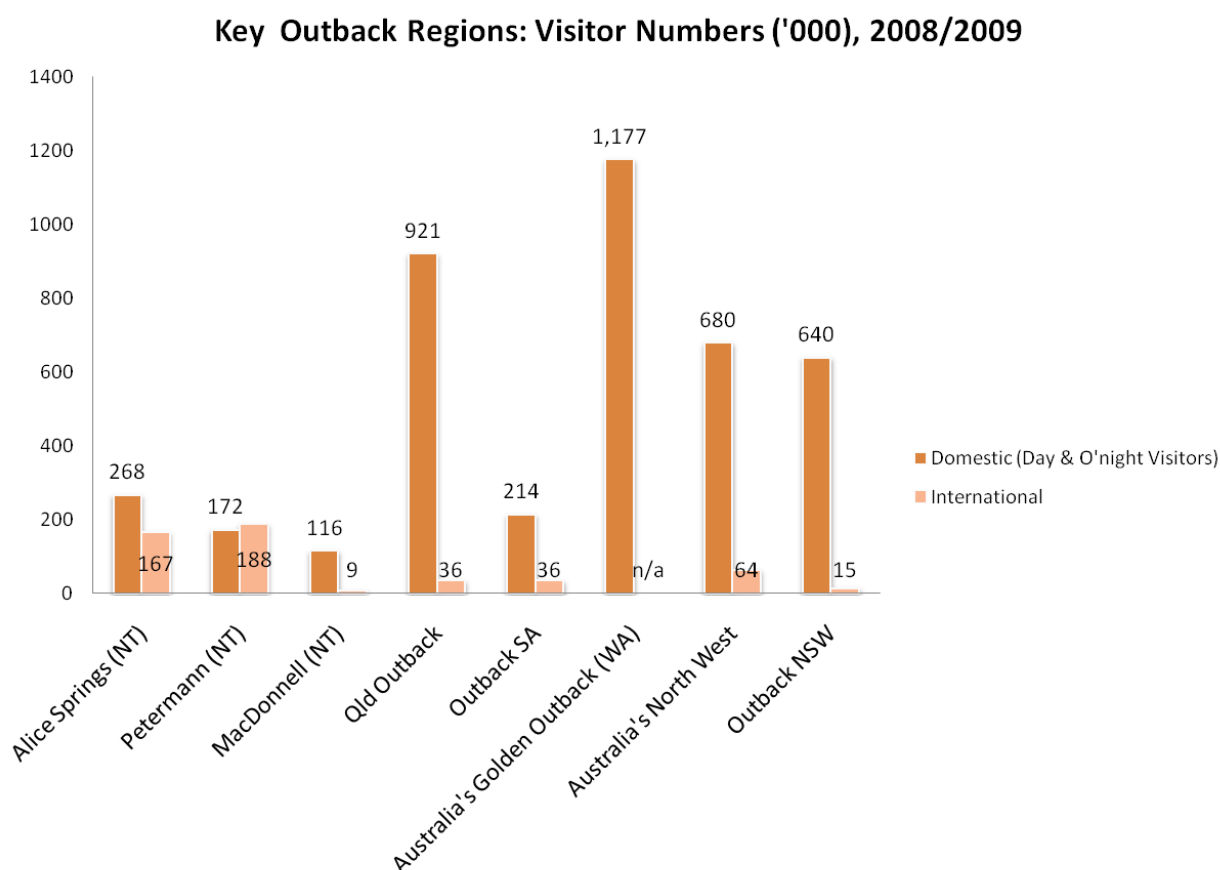


Figure 1: Visitor numbers to key outback regions in 2008/09

Source: TRA (2010e; 2010f; 2010g; 2010h; 2010i; 2010j; 2010k; 2010l)

In a 2007 survey, the South Australian Tourism Commission explored the strength of their brand compared to other Australian states (SATC 2007). One of the key measures explored by the survey was market perceptions of each state offering the opportunity for experiences of the 'Outback'. Key domestic tourist markets of Sydney and Melbourne ranked South Australia fourth as a destination for Outback experiences (SATC 2007). According to the survey the Northern Territory came first, followed by Western Australia and then Queensland.

The remote Aboriginal and Torres Strait Islander tourism sector may have opportunities to place increasing emphasis on domestic visitors generally, but the statistics suggest that carrying out such an approach may be met with mixed, or even limited success, and requires careful consideration. A key question for future research is whether publications like TRA (2010c) go far enough in highlighting the complexities of the

domestic market. For example, TRA (2010c) do not discuss complex matters such as reconciliation issues between domestic tourists and Aboriginal and Torres Strait Islander people, nor socio-political matters that have been explored in some background studies (e.g. Jacobsen 2010). While it may be sufficient for the existing government research to meet the needs of some tourism objectives, future inquiry is needed that is more applicable to the needs of remote Aboriginal and Torres Strait Islander tourism enterprises.

4.2 Some key visitor segments in remote Australia

There are various visitor segments with differing characteristics and interests in remote Australia. Many of these segments may be classified as part of the drive market, which accounts for around 70% of national travel activity (Tourism NT 2011). The exception in remote Australia may be parts of the Northern Territory, where drive tourism is the second largest transport market behind air travellers (Tourism NT 2011). Separating the segments that used multiple transport options shows that domestic visitors (70%) are much more likely to only drive within the NT compared with international visitors (14%) (Tourism NT 2011). Other regions, such as Outback Queensland, report a similar trend of domestic visitors being a primarily drive-based market which, as shown in Figure 1, accounts for the majority of travel in the region.

The different drive market segments identified in this report include four-wheel drivers (4WDers) and grey nomads, both of whom form part of the caravan and camping segment which will also be described.

Discussion will also include other visitor segments such as wildlife tourism, volunteer tourism, ecotourism and fishing tourism. Many of these segments overlap (e.g. some grey nomads may be 4WDers, as well as engaging in wildlife tourism and fishing tourism), but each are a target market with different needs for tourism planners to consider. The following discussions will highlight that contemporary market segmentation approaches used by tourism research agencies define visitors using experiential categories such as ‘experience seekers’ or ‘spirited travellers’ or ‘connectors’. While this can make it a little unclear about the exact match with niche categories, the experiential categories highlight how visitors to remote Australia have an overall orientation towards active pursuits and a desire for self-development and to be in touch with nature.

4.2.1 Four-wheel drivers

Four-wheel drivers are an important travel segment in remote Australia, and the existing literature suggests that for Aboriginal and Torres Strait Islander people involved in tourism there may be opportunities to engage with this market.

Increasing research in recent years has built an understanding of remote four-wheel-drive (4WD) activity. Studies have moved away from focusing on impact assessments towards identifying the characteristics and motivations of these travellers. A definition of 4WD tourism is ‘tourism experiences which the consumer and supplier perceive as heightened in value by the use of 4WD vehicles’ (Carson & Taylor 2010, p. 22). Carson and Taylor (2010) point out that in relation to 4WD tourism, especially for many domestic 4WDers, the distinction between tourism and leisure can be unclear as spending time four-wheel driving may be as important a motivator for the activity as seeing new places and relaxing. Other work has argued that domestic 4WDer activity in desert Australia may be far more complex, involving aspects of national, historical, political and group identity that provide deeper meaning for participants (Jacobsen 2010). Other

studies explore similar issues such as links to spirituality (Narayanan & MacBeth 2009) and heritage (Carson et al. 2009).

Studies on 4WD travel in remote Australia suggest that landscapes play an important role in the travel experiences of many 4WDers. Much of remote Australia may be regarded as part of the ‘Outback’, a term which provides landscape symbolism of ancientness, isolation and beauty (McGrath 1991). Taylor and Prideaux (2008) used the term ‘Explorer Travellers’ to reflect how domestic 4WD travellers in desert regions may sometimes perceive that their travel activity retraces, or even emulates the ‘pioneering’ of early European explorers in central Australia. Four-wheel-drive travel based on perceptions like this, Jacobsen (2010) suggests, may present a complex challenge for Aboriginal and Torres Strait Islander people involved in tourism. The picture emerging from the recent literature seems to illustrate that domestic 4WD tourism in remote Australia may be a setting where legacies of Australia as a colonial state must be taken into account.

Some tourism studies suggest that around 40% of self-drive leisure visitors in remote regions of desert Australia use a 4WD vehicle (Carson & Taylor 2010). Figure 2 identifies some findings from research on activities 4WD travellers indicated that they preferred during their 4WD journeys (Coghlan & Prideaux 2009). The highest scoring activities relate to camping, visiting natural landscapes and driving their 4WD vehicles. The figures suggest that 4WDers prefer activities where they are immersed in landscapes with the opportunity to become familiar with the surroundings. The mid to lower preference activities included active pursuits such as fishing, bushwalking and bird watching.

Figure 2 also indicates that the lowest preference activities include visiting Aboriginal and Torres Strait Islander cultural sites and communities, and attending cultural performances. As Carson and Taylor (2010, p. 29) also found, 4WD visitors interviewed in central Australia ‘generally do not purposively seek out Aboriginal tourism products’. For remote Aboriginal and Torres Strait Islander people involved in tourism this information raises a challenge for tourism development. The remote Australia visitation figures indicate that it is an area dominated by domestic drive travel, including 4WD travel, yet this segment may be difficult to classify as potential Aboriginal and Torres Strait Islander tourism visitors.

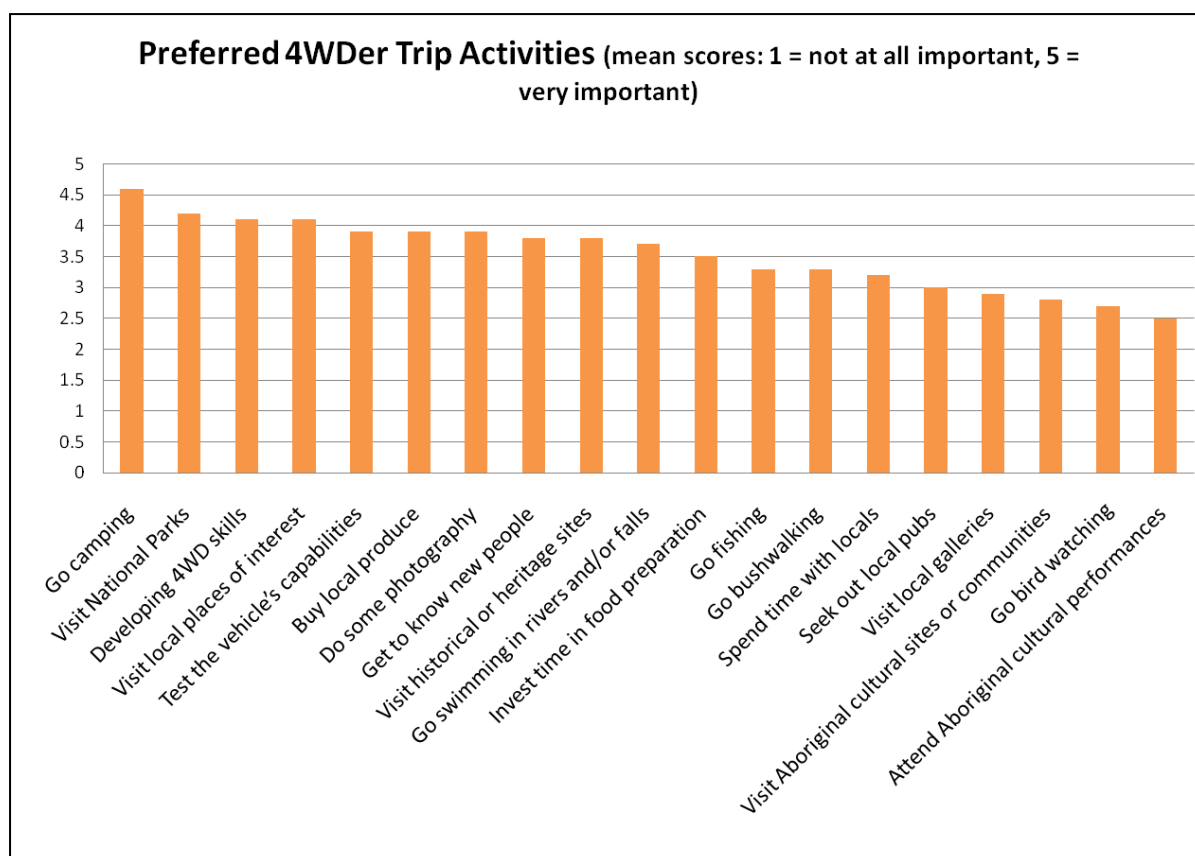


Figure 2: Preferred 4WDer trip activities (N = 208)

Source: Coghlan & Prideaux (2009, p. 13)

The insight from 4WD tourism research provides reason to suggest that remote Aboriginal and Torres Strait Islander people be involved in tourism that meets the needs of 4WD travellers. These forms of involvement may include providing opportunities for landscape immersion or opportunities for 4WD activity. Aboriginal and Torres Strait Islander control would be important to the cultural appropriateness of such initiatives. Aboriginal and Torres Strait Islander people may also need to consider that diversification could involve planning remote 4WD tourism around the possibility for deeper engagement between hosts and visitors. Activities and experiences that appeal to 4WDers can be accompanied by opportunities for them to also participate in cultural activities. Innovation and creativity may be an important part of building strategies for Aboriginal and Torres Strait Islander people to effectively access remote 4WD travellers.

4.2.2 Caravan and camping segment

The caravan and camping segment (which include the recreational vehicle, or RV, market) is a broad group that overlaps with other segments, including the 4WD and grey nomad markets. The official statistics are unclear, however, about how each of those other segments contributes to the overall caravan, camping and RV sector. In 2011 the overall caravan and camping market accounted for more than 45 million visitor nights, which is approximately 10% of overall visitor nights in Australia (TRA 2012d).

Around half of all caravan and camping segment visitors are aged 30–54, and about a quarter of other caravan and camping visitors were aged 55–70 (TRA 2012d).

Publications by Tourism Research Australia and Caravan and Camping Industry bodies emphasise that the caravan and camping segment has experienced growth in various ways. For example, the manufacture of new motor homes, camper trailers and caravans in 2011 experienced a 32% increase from 2010 (CCIANSW 2011). Over the past five years motor home and caravan registrations have also increased by around 23%, which Tourism Research Australia highlight is much higher than the 14.5% annual growth for all motor vehicle registrations in Australia (TRA 2012d). According to the CCIANSW (2011), there are approximately 330,000 motor homes and RVs registered in Australia and up to 80,000 people on some form of long-term caravan and motor home/RV travel around the nation.

The caravan and camping statistics provide insight that may be of use for remote Aboriginal and Torres Strait Islander people involved in tourism to target these travellers. The available information is unclear about the activities that caravan and camping visitors prefer; however, there may be scope for Aboriginal and Torres Strait Islander people to cater to the needs of these visitors (e.g. campgrounds). Similar to the 4WD market discussed above, innovation and creativity may be an important part of building strategies for Aboriginal and Torres Strait Islander people to effectively access caravan and camping travellers. More research may be needed to explore the kinds of tourism development opportunities catering to caravan and camping market. The assessment of such markets should take into account issues such as access, basic infrastructure and links between nearby attractions, destinations and touring routes.

4.2.3 Grey nomads

The grey nomad segment describes ‘retired Australians who travel in caravans and motor homes’ within Australia who are often on some form of extended journey (Holloway 2007, p. 164). They are usually older travellers who use a caravan, motor home or other vehicle (e.g. modified bus) as their source of accommodation and mode of transport. Some sources in the literature suggest that as Australia’s population continues to age the market in grey nomad tourism will similarly expand (EDC 2011). It is generally accepted that the segment include travellers aged 55 and over.

The available literature is unclear about preferred grey nomad activities, but a review of grey nomad tourism in Queensland showed that they are often motivated by experiencing landscapes and taking time to experience Australia (EDC 2011). The review highlights a need for more research and statistics on grey nomads, but suggests that they are part of the caravan and camping market, the drive market and the mature age market. This reflects that grey nomads should not be classed as a single group, but rather as exhibiting diverse characteristics (EDC 2011).

It is important to point out that existing work by Tourism Research Australia discussed earlier involves market segments which correspond with grey nomads. Indeed, this includes the retired self-drive segment discussed earlier, which according to TRA (2010b) accounts for around 20% of the domestic market for Aboriginal and Torres Strait Islander tourism experiences. Tourism development opportunities in addition to Aboriginal and Torres Strait Islander tourism for grey nomad/retired self drive visitors have received little discussion in the literature. As grey nomads are a sub-set of the camping and caravan sector (EDC 2011), there may be scope for Aboriginal and Torres Strait Islander people to develop services and infrastructure that cater to the needs of these visitors. Development strategies may include considering issues such as access, basic infrastructure and links between nearby attractions, destinations and touring routes. Further research is needed into the diverse opportunities the grey nomad market may offer for

remote Aboriginal and Torres Strait Islander people involved in tourism, as the EDC (2011) review pointed out that this market segment is important to regional tourism.

4.2.4 Volunteer tourism

Some state tourism authorities have placed increasing emphasis on targeting tourists who travel to and within Australia for the purposes of volunteering. Tourism NT (2008a), for example, maintained that volunteer tourism is an opportunity for the Northern Territory because it corresponds with its key experiential traveller market segment. Experiential travellers seek enrichment through cultural and landscape immersion experiences which, according to Tourism NT, can be provided through volunteering experiences. Tourism NT divided their potential volunteer markets into two groups: skilled mature travellers and younger, but largely unskilled travellers.

Volunteer tourism market opportunities for remote Aboriginal and Torres Strait Islander people may be varied, but might include community development, land management and other activity programs. While the supply of accommodation for long-term volunteer tourists may be a concern in some remote areas, segments such as the grey nomad market have the potential to provide for their own lodging needs (given the availability of some basic infrastructure). The Indigenous Community Volunteer program is one avenue for remote Aboriginal and Torres Strait Islander people involved in tourism to develop so they can cater to volunteer tourists. More research is needed to understand the volunteer tourism opportunities for remote Aboriginal and Torres Strait Islander people involved in tourism.

4.2.5 Wildlife tourism

Viewing wildlife is often an important element of tourist experiences in remote Australia. Work by the Cooperative Research Centre (CRC) for Sustainable Tourism highlights that there are many variations and options for developing wildlife tourism. Forms of wildlife tourism discussed by the CRC Sustainable Tourism include wild kangaroos (Croft & Leiper 2001); recreational hunting (Bauer & Giles 2002); captive wildlife experiences (Tribe 2001); bird watching (Jones & Buckley 2001); sea turtle ecotourism (Tisdell & Wilson 2002); dolphin, whale watching and marine tourism (Smith et al. 2006; Birtles et al. 2001); and other terrestrial wildlife viewing (Higginbottom & Buckley 2002). Wildlife opportunities for tourists in Australia include the chance to view unique, rare and endangered species where fauna are part of overall experience of natural environments (Rodger et al. 2007).

The terminology used by research agencies about wildlife tourism can differ from state to state, making it difficult to compare between states and studies. For some state tourism agencies, wildlife tourism experiences (such as bird watching) fall under nature-based tourism experiences or ecotourism as highlighted below. Tourism South Australia, for instance, view nature-based tourism as:

... any sustainable tourism activity or experience that relates to the natural environment, whether for relaxation, discovery or adventure. This covers a range of tourism experiences including ecotourism, bushwalking, wildlife experiences, bird watching, marine/coastal tourism, fossil/geological tourism, responsible 4 wheel driving, scuba diving, adventure tourism, caving, whale watching, etc. (SATC 2007, p. 1, emphasis in original)

Tourism South Australia say that around 72% of domestic tourists prefer to holiday in areas where they 'can see nature or be in a natural setting' (SATC 2007, p. 1). This preference includes visiting areas such as national parks. According to Tourism South Australia around 11% of domestic visitors to the state in

2005/06 participated in whale/dolphin watching, bushwalking or visiting national parks during their visit. Tourism Queensland viewed wildlife tourism as a segment involving ‘tourists who engaged in the activities of “whale or dolphin watching” or “visiting wildlife parks, zoos and aquariums” during their visit’ (TQ 2006a). Tourism Queensland indicate that domestic tourists in 2005 who participated in either of these activities ‘accounted for 3% of all visitors to QLD’ (TQ 2006a). In a 2007 survey of domestic tourists to Queensland ($N = 1,356$), the CRC Sustainable Tourism found that around 32% had taken a trip within the previous 12 months which involved some form of wildlife experience (Fredline 2007). More than half of domestic tourist wildlife experiences occurred within national parks and other natural settings; however, the study reported little difference between the characteristics of those domestic wildlife tourists and domestic tourists with captive wildlife experiences (Fredline 2007).

The international wildlife tourist statistics also show some differences in the measurement and reporting methods used by tourism agencies in different states. For example, Tourism Queensland adopt the same definition of ‘wildlife tourism’ for their international tourists as they use for their domestic tourists to say that in 2005/06, 43% of all international tourists engaged in wildlife tourism activities (TQ 2006a). Tourism South Australia used their slightly broader nature-based tourism definition of participating in visiting national parks, bushwalking or watching whales/dolphins to give the larger figure of 51% of 2005/06 international tourists having participated in such activities (SATC 2007). Tourism South Australia also indicated variation among international visitors based on their country of origin. Visitors from countries such as Switzerland and Germany report above 75% participation, while other countries such as Japan report strong but less participation of 59% (SATC 2007). These different participation rates in wildlife tourism between domestic and international visitors highlight the relative importance of wildlife and nature-based tourism for international tourists. Tourism South Australia and Tourism Queensland recommend that these different visitor segments need careful consideration.

In many existing Aboriginal and Torres Strait Islander remote tourism initiatives it would be unusual for a visitor experience not to include some form of wildlife encounter. Aboriginal cultures are strongly bound to fauna through totem, story, food and other associations, which creates potential for various initiatives in remote Australia. Anangu have shared some of their ideas for future opportunities in Uluru – Kata Tjuta National Park, such as considering animal tracking tours and establishing endangered species interpretation and display (Uluru – Kata Tjuta National Park 2010). Whether for conservation or cultural interpretation, the research and industry examples highlight that wildlife experiences are sought by many visitors and represent development potential for remote Aboriginal and Torres Strait Islander people involved in tourism.

4.2.6 Fishing tourism

While fishing tourism is often viewed as a drawcard activity for some parts of remote Australia, it is invariably classified as a niche market. Fishing is often a feature of regions such as the Northern Territory’s ‘Top End’, Cape York and north-west Western Australia. The Cape York and Torres Strait Tourism Development Action Plan 2008–2011 (TQ 2008a) indicates that alongside four-wheel driving, adventure, nature-based and cultural drawcards, fishing ranks highly among visitors, particularly domestic travellers. At the time of developing the plan, TQ (2008a) maintained that fishing is an existing drawcard in Cape York with the potential for further development, while for the Torres Strait there was scope for fishing to be an important ingredient in targeting adventurous tourists seeking new tourism experiences and regions. The tourism development plan included an aim to build awareness in domestic and international markets about the fishing opportunities in the Cape York and Torres Strait regions.

The appeal of fishing in parts of remote Australia is highlighted by the Tourism NT claim that ‘the Northern Territory is widely regarded as Australia’s last wild fishing frontier because of the abundant number of fresh and saltwater fish species found in its waters, its comparatively low human population and its wilderness appeal’ (Tourism NT 2009, p. 1). In the Northern Territory, around 84% of fishing visitors are intra or inter-state domestic tourists (Tourism NT 2009). The average length of stay differed between intra (3 nights) and interstate (11 nights); however, Tourism NT report that for international fishing visitors the average length of stay (24 nights) was much longer than the overall Northern Territory international visitor average length of stay (9.2 nights) (Tourism NT 2009). The majority of fishing visitors to the Northern Territory (75%) reported being on holiday during their visit.

Other regions such as the Pilbara in north-west Western Australia are also recognised by tourism authorities as having unique visitor fishing opportunities (TWA 2010), and still other studies have explored charter boat fishing (Gartside 2001) and fishing development opportunities for Aboriginal and Torres Strait Islander people (Palmer 2001). Where the charter boat sector is concerned, Gartside (2001) observes that there are opportunities to develop charter boat tourism away from populated areas; however, the report recommends that entering the industry should be based on sustainable practices rather than opportunism. Gartside (2001) argues for codes of conduct and representative bodies to ensure the sector is well coordinated and delivers high standards.

In relation to fishing tourism opportunities for Aboriginal and Torres Strait Islander people in Northern Australia, Palmer (2001) observed that charter boats and safari hunting (e.g. crocodile) offer two key development opportunities. Similar to Gartside (2001), Palmer (2001) also maintained the need to establish codes of conduct in these sectors, especially to ensure proper treatment of animals such as crocodiles. Palmer (2001) also argued that the establishment of these kinds of ventures by Aboriginal and Torres Strait Islander people would be best approached in joint venture or partnership arrangements with experienced operators familiar with the industry. Palmer (2001) further pointed out that a considerable hurdle in developing such initiatives is tenure over land and sea resources by Aboriginal and Torres Strait Islander people.

Since Palmer’s (2001) report, the Torres Strait Regional Sea Claim has passed the native title tribunal, including the use of marine resources for commercial purposes (NNTT 2010). The Torres Strait Regional Sea Claim came almost 10 years after the Croker Islander case in which the High Court granted Croker Islander claimants native title rights to non-commercial fishing and hunting in their claim area, the first recognition of its kind in Australia.

4.2.7 Ecotourism

There is a range of data available on ecotourism. Tourism Queensland’s most current information, from 2006, described ecotourist segments from source countries like China (TQ 2006b), the United States (TQ 2006c), Germany (TQ 2006d) and the UK (TQ 2006d). Tourism Queensland research viewed an ecotourist:

... as someone who did at least one of the following activities on their last long haul holiday:

- Saw wildlife in its natural surroundings
- Stayed in the wilderness
- Visited a rainforest/jungle
- Visited national parks

And agreed that they look for at least one of the following activities:

- Environmental/ecological sites to visit
- See wildlife in natural surroundings
- Walk in untouched countryside and natural environments.

(TQ 2006b, p. 1)

According to Tourism Queensland, 22% of all Chinese tourists surveyed ($N = 1016$) qualified as ecotourists (TQ 2006b), while for the German market ($N = 1012$) it was 33% (TQ 2006d), 26% for the UK ($N = 1004$) (TQ 2006e) and 20% for the United States ($N = 1017$) (TQ 2006c). In evaluating their 2003–2008 Ecotourism Plan, Tourism Queensland maintained that international and domestic visitors who experienced nature-based activities in Queensland from 2003 to 2007 increased at an average of 5% per year (TQ 2008b). While the average length of stay differed, 17.9 nights for international compared to 5.9 nights for domestic nature-based tourists, these visitors demonstrated a tendency to spend time within the destination.

According to the Tourism and Transport Forum, around 61% of international visitors in 2011 participated in nature-based activities, generating more than \$10.3 billion (TTF 2012). Tourism Australia (TA 2006e) maintains that between 30% and 50% of all inbound visitors to Australia may be classified as ‘experience seekers’. Tourism Australia note that, among a range of characteristics, experience seekers engage in activities to enhance themselves, are usually well-educated and aim to become immersed in the destinations they visit (TA 2006e). This overall segment is similarly targeted by state tourism authorities such as Tourism NT, for instance, who describe their collection of main market segments (including baby boomers, working holiday, youth, budget travellers, drive and special interest) as ‘spirited travellers’ and ‘experience seekers’ (Tourism NT 2008b). Segmenting visitors as ‘ecotourists’ appears to be less of a priority by these agencies; however, this is not to say that key target markets such as experience seekers do not correspond in some regards with ecotourism products and experiences, but further inquiry is required to verify the possibilities.

The literature about ecotourism is still developing (see Weaver 2007) and the potential for ecotourism development for remote Aboriginal and Torres Strait Islander people has received some debate and discussion (e.g. Fuller et al. 2005a, 2005b; Beck & Somerville 2002; Commonwealth Department of Tourism 1996). The literature argues that ecotourism development is suitable for Aboriginal and Torres Strait Islander people because it encourages small-scale development based on principles of sustainability and striking a balance between development and natural environments. Sources also maintain that ecotourism provides models to combine environmental conservation objectives with community development and the preservation of culture and existing ways of life (Hill & Hill 2011; UNESCO 2003).

Some work supports the suggestion that ecotourism development for remote Aboriginal and Torres Strait Islander people requires strategies that also integrate community development (Fuller et al. 2007; Beyer et al. 2005). Fuller et al. (2007) argue that in remote Australia ecotourism offers Aboriginal and Torres Strait Islander people economic opportunities, but development must consider a range of issues, such as the influence of culture, the need for education and training, links to broader tourism industry and the utilisation of consultants and planning in the early stages of development. As Beyer et al. (2005) argue, there are numerous planning considerations and guidelines that must be taken into account; however, there are many cases in Australia (e.g. Fuller et al. 2005b) and overseas (e.g. UNEP 2007) of remote native peoples having established ecotourism initiatives which continue to operate.

5. Visitor segments in remote Australia: examples from three destination regions

Remote Australia includes many different regions administered and funded federally, and by different state and local tourism agencies. Some of the key tourism regions include:

- Australia's Golden Outback
- Outback NSW
- Outback Queensland
- MacDonnell
- Torres Strait Islands
- Australia's North West
- Outback SA
- Petermann
- Cape York (Far North Queensland)

In addition to these key regions, there are a range of other areas reflecting smaller regions, localities, touring routes and other features. Examples include:

- The Gulf of Carpentaria
- The Red Centre Way
- The Kimberley Region
- Corner Country
- The Canning Stock Route
- Spinifex Country
- The 'Top End'
- The Outback Way
- The Pilbara Region
- The Flinders Ranges
- Arnhem Land
- The Savannah Way

While there are many other examples, such as the various 4WD and drive routes like the Binns Track, the number of different tourism destination regions reflect the diverse character of tourism across remote Australia. Each region contains particular attractions and tourism experiences, yet most fall within the common perception of 'the Outback' as discussed earlier (4.2.1). Many tourism regions in remote Australia have been the subject of market research and planning activity.

It is important to recognise that market opportunities in remote Australia are different from place to place. There are many reasons for the diversity, including access routes, market trends, destination attractions, destination infrastructure, existing investment, and the available experiences and activities. This means that marketing considerations require localised decision making; there is no one-size-fits-all across remote Australia. The market characteristics of three regions (Central Australia, the Outback Way and Outback Queensland) will be briefly presented below. Each are administered by different tourism authorities and offer different tourism experiences, yet seem to overlap with many of the market segments discussed in this report. Future research might explore these issues and how remote Aboriginal and Torres Strait Islander enterprises can tailor their strategies accordingly.

5.1 Central Australia

The following information is derived from the 2012 Tourism Research Australia report titled *Central Australia Visitor Profile and Satisfaction Report: Summary and Discussion of Implications* (TRA 2012e). Visitation statistics (from quite a small sample: $N = 50$) were gathered as part of the Central Australia Visitor Profile and Satisfaction project. Some of the key findings highlighted the place of origin, life stage, transport, travel routes and activity preferences for visitors to the region.

Place of origin figures revealed that around three-quarters of visitors to Central Australia were domestic tourists, around 97% of whom were inter-state visitors, primarily from NSW and Victoria (27% each) and Queensland (18%). International visitors mostly came from Europe, which accounted for around 67% of visitors. International visitors were likely to have reported visiting Central Australia because the region was iconic (83%), for nature experiences (40%), and to learn about Aboriginal culture (25%). On the other hand, domestic tourists were likely to have reported visiting Central Australia because of opportunities for relaxation (22%), for spending time with others (14%), for the variety of things to see and do (29%), and for events (9%).

The figures show that up to 60% of domestic visitors were older life stage visitors, compared to 28% of international tourists. Around 32% of all visitors to Central Australia were aged 55–64, while another 19% were 65 years and above.

The main modes of transport used by visitors to reach Central Australia were air (49%), self-drive (37%) and rail/coach (13%). Central Australia received various segments, including holiday, visiting friends and relatives and business visitors. International visitors (89%) and rail/coach visitors (95%) were most likely to have visited the region for holiday or leisure. Among the drive visitors, 45% drove north along the Stuart Highway from South Australia, while around 28% drove the Stuart Highway south from Tennant Creek. Leaving Central Australia, 42% drove the Stuart Highway south towards South Australia, while 33% departed driving the Stuart Highway north towards Tennant Creek.

5.2 The Outback Way

The Outback Way is a branded driving route covering 2,750 kilometres linking Winton in Queensland with Laverton in Western Australia, to give a path from Cairns to Perth. The route traverses a range of sealed and unsealed roads. The Outback Way project emerged from the Outback Highway Development Council which aimed to improve the driving infrastructure and tourism opportunities covering a transcontinental portion of remote Australia. According to the Outback Way Tourism Plan, a driving route of this nature:

... appeals ‘naturally’ to adventure travellers (i.e. 4WD explorers, self contained campers, active outdoor-oriented self-drive travellers) who are generally well provisioned in respect to water, food, high ground clearance vehicles and offroad trailers / vans. Research suggests a majority of travellers along the Outback Way have a preference for a self-guided journey with minimum interference and maximum freedom to immerse themselves in the outback. (Evolve Solutions 2008, p. i).

Research conducted in preparation for the tourism development plan highlights market preferences to increase infrastructure such as signage and campsites along the route, and to increase provision of short ‘side trips’ and excursions leading from the Outback Way, particularly opportunities to explore landscapes and engage in wildlife encounters. Indeed, the market typically travelled in their own 4WD vehicles and preferred self-guided visitor activity and natural landscapes with limited infrastructure such as roadhouse accommodation, new tours or attractions.

The Outback Way tourism development plan (Evolve Solutions 2008) identified three main market segments ($N = 157$) that travel along the Outback Highway:

- Group 1: This group accounted for 49% of the sampled Outback market. Around 67% of travellers in this group were from South Australia, NSW or Western Australia. Aged 60 years and above, this

group were mainly interested in adventure camping and the landscape; they typically travelled as couples/families in their own 4WD vehicle and often took journeys of 23 days or more (63%). Many reported to have previously travelled roads along the Outback Way, and relied on information sources such as friends/relatives (23%), atlases/maps (23%), past experience (19%) and visitor centres (14%).

- Group 2: This group accounted for 40% of the sampled Outback Way market. Aged 40–59, this group were mainly interested in the landscapes, flora and fauna, and four-wheel driving. They typically travelled as family groups or couples in their own 4WD vehicle and often took journeys of 3–7 days (41%), 8–14 days (23%) and more than 23 days (28%). Of this group, 58% had not previously travelled roads along the Outback Way; they gathered information from atlases/maps (28%), friend/relatives (26%), past experience (18%) and visitor centres (10%). Around 71% of Group 2 were from Western Australia, Queensland and NSW.
- Group 3: This group accounted for 11% of the sampled Outback Way market. Aged 19–39, this group were mainly interested in the landscapes, flora and fauna, and opportunities for adventure. This group often travelled as friends or singles, with 69% using their own 4WD vehicle, 15% using a hired vehicle and 15% travelling by coach. Group 3 were from overseas (38%) and Western Australia, Queensland and NSW (38%). Around 69% had not previously travelled roads along the Outback Way, and their main sources of information were atlases/maps (31%), friend/relatives (28%) and newspapers/magazines (15%).

An additional difference between the three Outback Way market segments is the preferred type of accommodation. Group 1 preferred caravan (43%), camper trailer (29%) and swag (11%). Group 2 preferred swag (40%), camper trailer (23%) and caravan (16 (percent), while Group 3 preferred swag (54%), car/4WD (24%) and camper trailer (15%). In addition to these variations, the Outback Way Tourism Plan highlighted that all groups notably did not indicate hotel, motel, cabin, lodge or other forms of accommodation.

The Outback Way Tourism Plan identified future target markets comprising primary and secondary segments. Primary segments included Retired Baby Boomers and Grey Nomads (see Section 4.2.3), and families and couples travelling in 4WD vehicles. Primary markets were predominantly domestic tourists, ‘travellers who are predisposed to travelling in the outback, camping, 4WDing and being largely self-sufficient in respect to travel in remote areas’ (Evolve Solutions 2008, p. 47). Secondary target markets included international visitors, special interest groups, and Australian youth.

5.3 Outback Queensland

Outback Queensland, covering around 48% of the state and 21 local government areas, is overseen by the Outback Queensland Tourism Association. Outback Queensland accounted for 2% of visitation in Queensland in 2011 (TQ 2012). Research conducted by Tourism Queensland and Tourism Research Australia in 2010 highlighted that among the various visitor segments targeted by Tourism Queensland state-wide (e.g. active explorers, unwinders, stylish travellers, self-discoverers, connectors and social fun seekers), the connector segment is the most likely to visit Outback Queensland (TQ 2011a). Tourism Queensland (TQ 2011b) defines the connector segment as visitors that identify with the following statement:

I see holidays as a chance to connect with the people I care most about. I will often compromise my own preferences in terms of activities to ensure everyone has a good time. It's about what is real and what's important. (TQ 2011b, p. 1).

According to Tourism Queensland (TQ 2010), the connector segment identify with Outback Queensland because the region provides opportunities for bush walking, hiking, escaping crowds, visiting natural attractions, meeting local characters, as well as experiencing heritage culture and history. The visitors surveyed in Outback Queensland were long-haul holiday older Australians (TQ 2011a). The main place of origin for these visitors was Queensland (37%), NSW (23%) and Victoria (26%), and they were more likely to travel as a couple (66%) (TQ 2011a).

The Tourism Queensland figures show that up to 85% of Outback Queensland visitors drove their own motor home or vehicle, predominantly preferring to use camp grounds and caravan parks as their main form of accommodation (71%) (TQ 2011a). TQ (2011a) also point out that almost half of Outback Queensland visitors used a combination of non-commercial and commercial camping areas during their visit. In discussing the different camping options, Outback Queensland visitors reported that:

The facilities, entertainment and social interaction are all seen as positive aspects to staying in commercial camping sites; whilst a lack of privacy, noise and expense are seen as potential drawbacks. Privacy, and the ability to have a 'real' outback experience (complete with camp fires, star gazing and isolation or quietness), are the perceived positives to staying in non-commercial camping sites; whilst a lack of facilities, safety issues and a lack of policing of non-commercial sites emerge as the negatives. (TQ 2011A, p. 1).

Despite the preference for escaping crowds, self-sufficient accommodation and modes of transport, the TQ research highlighted that visitors perceived visitor facilities, services and hospitality to be of high standard. The main visitor experiences were described by Tourism Queensland as follows:

The wide range of attractions gave visitors an insight into Australia's pioneering country; additionally, the 'charming streetscapes', historical buildings and quirky Outback life allow visitors to discover the region's identity.

...[but] it is the people – their tales of personal life in the outback and unique outback charm, personal anecdotes and insider knowledge – that enable visitors to understand and appreciate the region. (TQ 2011a, p. 2).

Tourism Queensland advised tourism operators that the region can suffer from poor visitor expectations or understandings, but once people visit 'many discover it is unique and actually has more to offer as a destination than they had thought' (TQ 2011a, p. 2). Tourism Queensland recommend that Outback tourism operators play an active role in 'selling' and providing visitors with information about the entire Outback region.

December 2011 figures showed a downturn in domestic and international visitation to Outback Queensland of around 5% and 10% respectively, which Tourism Queensland attributed largely to widespread flooding affecting much of the state (TQ 2012). Tourism Queensland observed that decreased visitation in the region was largely due to a downturn in visiting friends and relatives, while for the three years leading to and year ending 2011, the 'touring' market remained 'resilient' (TQ 2012). Tourism Queensland also found that declining numbers of European visitors to Australia generally flows on to downturns in Outback tourism visitation because of the importance of European tourists in remote Australia.

6. Summary

This report has provided a brief description of some of the main market segments and statistics related to remote Aboriginal and Torres Strait Islander people involved in tourism. By dividing the statistics and information into two main groupings (Aboriginal and Torres Strait Islander tourism and remote tourism) the report highlights that remote Aboriginal and Torres Strait Islander people involved in tourism have various tourism development and participation options. The statistics highlight that while Aboriginal and Torres Strait Islander tourism opportunities based on culture are common forms of participation, numerous other visitor segments that already exist in remote Australia offer the potential for development in different sectors of tourism. This could give remote Aboriginal and Torres Strait Islander people the opportunity to engage in tourism development in roles that include different skills, infrastructure and approaches than those used in Aboriginal and Torres Strait Islander tourism development.

The statistics for many of the market segments reveal that engaging in diversified forms of involvement in tourism would require responding to the needs of existing markets in remote Australia. For example, developing remote tourism may involve the provision of campgrounds for grey nomads, 4WDers, caravan and camping segments. The desire for wildlife and ecotourism segments to be immersed in landscape highlights opportunities to provide walking trails and special interest wildlife experiences. There may be opportunities to develop new 4WD tracks and 4WD destinations, or unique volunteer tourism experiences linked to tourism or community initiatives. While it is useful to consider new visitor markets, it is crucial to assess opportunities from accessible visitor segments. The market conditions of remote Australia can be challenging, highlighting the importance for decision makers to be well-informed about their options.

Remote Australia is diverse and covers a tremendous range of regions, ecologies, locations, places and branded tourism destination regions. As the three regional examples highlighted in this report show, the market characteristics and needs will differ from region to region. The many segments reviewed in this report highlight that there will always be challenges in targeting one segment over another; however, by considering some of the main segments available to remote Aboriginal and Torres Strait Islander people involved in tourism, there is scope for decision makers to identify all tourism potential in their region and to make assessments based on a wide range of available knowledge.

There are various reasons why Aboriginal and Torres Strait Islander people have the capacity to develop remote tourism, and in various parts of Australia the determination of native title is playing a part to increase these opportunities. As of 2012, native title determinations Australia-wide comprised lands covering around 17% of the continent (NNTT 2012). While lands where native title ‘may’ exist under Australian law often include areas viewed as ‘unproductive’ by settler society, Neates (2010) highlights that acquiring native title opens economic opportunities for Aboriginal and Torres Strait Islander people. Legal recognition provides Aboriginal and Torres Strait Islander people with more scope to take control over the future direction of activities on country (e.g. traditional lands). Tourism may provide an important way to ensure that future generations and visitors continue to share in the many features of the landscape. Developing initiatives suited to a range of visitor segments may also generate opportunities for Aboriginal and Torres Strait Islander people involved in tourism to enrich the experiences, and influence the expectations and understanding of all kinds of travellers to remote Australia.

6.1 Future research needs

Some of the future research needs arising from this report include:

- the need for statistics related to remote Australia as a whole
- the need for tourism statistics specifically related to remote Aboriginal and Torres Strait Islander people involved in tourism
- the need to highlight how diverse tourism visitor market segments may be specifically linked to remote Aboriginal and Torres Strait Islander people involved in tourism
- further attention being given to other visitor segments, such as the corporate market, the cultural awareness sector, school excursions and other niche markets for remote Aboriginal and Torres Strait Islander people involved in tourism
- the need to clarify which visitor segments apply to the many various regions of remote Australia, especially regions with little existing research
- the need to explore long-term trends in existing visitor markets in remote Australia
- the need to explore the potential for emerging markets such as China in remote Australia, especially for regions outside of iconic or easily accessible destinations
- the need to identify how existing tourism statistics at the regional level are targeted towards and account for remote Aboriginal and Torres Strait Islander people involved in tourism
- the need to identify the extent to which remote Aboriginal and Torres Strait Islander people involved in tourism already cater to visitor segments such as caravan and camping, 4WDers, grey nomads, ecotourists, wildlife tourists, volunteer tourists and fishing tourists
- the need to identify the monetary value of visitor segments in remote Australia, especially in regions with little existing research.

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