

DOMESTIC AND INTERNATIONAL TOURISTS' ASSOCIATIONS WITH ABORIGINAL TOURISM

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Abstract

Across Australia, Aboriginal tourism enterprises provide domestic and international tourists with a range of products and services. These include cultural tourism experiences; mainstream contemporary leisure activities such as kayaking, camel riding, quad biking; and activities connected to nature, such as whale watching, snorkelling or fishing. Aboriginal tourism enterprises also contribute to tourism infrastructure including hotels, eco-lodges and restaurants. While Aboriginal enterprises have an opportunity to add value to mainstream products, consumer demand has been impacted through low levels of product awareness and perception by tourists that Aboriginal tourism is a homogenous product. Our study examined the attributes associated with Aboriginal tourism by domestic and international tourists. Surveys of tourists revealed specific attributes, such as activities, cultural associations and places that tourists associate with Aboriginal tourism. Exploratory factorial analysis identified factors hidden in the set of attributes associated with Aboriginal tourism. Our findings show similarities and differences between international and domestic tourist markets. Low levels of product awareness exist in both tourist markets, with attributes connected to Aboriginal culture having higher levels of association compared to contemporary or coastal attributes. These results can be used by stakeholders to meaningfully support marketing efforts to market Aboriginal enterprises

Keywords: Aboriginal Experiences, Domestic Tourists, Indigenous Tourism, Tourist Associations, International Tourists.

1. Introduction

Tourism is a major export industry in Australia. To capitalise on the industry growth, and to overcome low employment opportunities in remote areas, all levels of the Australian government have employed strategies which encourage the development of Aboriginal tourism enterprises, (Buultjens et al, 2010). In addition to financial benefits (Jackson 2009; Zander et al, 2014), tourism is considered to provide Aboriginal people with opportunities to transmit “cultural knowledge to younger generations” (Strickland-Munro & Moore 2013, p. 41). Arguably, additional benefits to the community hosting the tourism have been realised through increased social capital and cultural preservation (Whitford, & Ruhanen 2013), and the sharing of Aboriginal knowledge and practise with non-Aboriginal people contributing to social change (Lloyd et al, 2015).

Whilst a growth in tourists visiting regional Australia was noted in domestic and international markets, the dispersal remains focused on five key destinations, particularly in the international market (Government 2019). Consequently, this impacts on the capacity of Aboriginal

communities in remote areas to benefit from the continued growth in the tourism sector. To assist remote Aboriginal operators who wish to develop targeted marketing strategies, studies have considered tourist motivation to participate in Aboriginal experiences (Ruhanen et al, 2015; Ruhanen et al, 2013a) and travel to remote destinations (Ashwell 2015; Carson, Dean et al. 2009; Kim & Brown 2012). Yet, research has yet to identify the attributes tourists associate with Aboriginal tourism experiences, impacting on the capacity of Aboriginal enterprises to effectively position their product in the tourism market. Thus, to contribute to the literature in the field of Aboriginal tourism, the exploratory study reported in this paper examined the attributes domestic and international tourists associate with Australian Aboriginal Tourism. The findings provide insights to support marketing planning and provide an avenue for further research.

2. Literature Review

Across Australia, Aboriginal tourism enterprises operate domestic and international tourists services with a diverse range of products and services. These products include cultural tourism enterprises (Jackson 2009), in addition to more contemporary leisure activities such as spas, kayaking, camel riding, quad biking or 4WD (TA n.d.) (Fletcher et al, 2016; Whitford, & Ruhanen 2010). Activities connected to nature are offered, such as whale watching, snorkelling or fishing (Australia, T 2017), with Aboriginal operators having an opportunity to add value to these mainstream products to create a competitive advantage (Ryan & Huyton 2000). Furthermore, Aboriginal enterprises provide opportunities for tourists to observe Rock Art which represents some of the oldest images globally (David et al. 2013). Economic opportunities have also been realised through the sale of art and handicrafts (Ryan & Huyton 1998), with widespread growth in the Aboriginal art and craft sector over the last twenty years in Australia (Altman 2010). Aboriginal tourism enterprises have also supported the infrastructure required by tourists visiting destinations including hotels, eco-lodges and restaurants (Australia, T 2017; Whitford, & Ruhanen 2010). To support Aboriginal tourism enterprises research has been undertaken to further understand tourists' motivation, interest and participation in Aboriginal tourism activities. Research has identified that tourists who participate in Aboriginal tourism can be segmented based on depth of experience the consumer seeks and the level of motivation to participate (Kutzner & Wright 2010 ; McKercher 2002; Tremblay & Pitterle 2008). However, for domestic and international tourist markets, the primary motivation for an Australian holiday is not to participate in Aboriginal cultural activities (McKercher 2002; McKercher & Du Cros 2003; McKercher et al, 2004 ; Oppewal et al, 2010; Ruhanen et al, 2015; Ruhanen et al, 2013a). Indeed, it is argued that participation in Aboriginal tourism activities are commonly opportunity driven (Tremblay & Pitterle 2008). In the context of ecotourism, Krider (2010) identified that the boundaries between specialist markets and mass tourism remain blurred. This is reflected within Australia with the majority of tourists considering activities, interest and location to be equally important in the decision-making process (Carson et al, 2007).

Furthermore, whilst remoteness is a point of difference for some niche markets (Buultjens et al, 2011; Carson et al, 2007), the location of a remote Aboriginal tourism enterprise can act as a constraint, reflected by decreasing numbers of international and domestic tourists visiting remote destinations (Holyoak & Carson 2009; Taylor et al. 2015). The majority of Australia is categorised as very remote or remote, with limited transport networks (Adelaide 2019), affecting market access and reducing tourist visitor numbers (Buultjens et al, 2011; McKercher, Ho & du Cros 2004). Limited market access also impacts on tourists' ability to visit remote destinations increasing the costs of travel, in addition to the time required to travel to and undertake a remote tourism engagement (Carneiro & Crompton 2010; Lynch et al. 2011). Climate also impacts on destination choice (Buultjens et al, 2011), with adverse weather conditions in remote destinations such as extreme heat or heavy rain, having a major impact on visitor numbers

(Hadwen et al. 2011) and exacerbating the seasonality of consumer numbers. Remoteness also increases logistical issues such as access to banking and health services (Buultjens et al, 2011). Additionally, false preconceptions concerning inferior accommodation, restaurants, safety and comfort also impact on tourists' willingness to visit remote destinations within Australia (Buultjens et al, 2011).

These constraints provide some insights to explain why despite tourists indicating high levels of interest in visiting remote Australia, visitor numbers continue to decline (Carson, & Taylor 2009). To overcome constraints, activities within remote destinations need to act as a pull factor linking motivation and destination choice (Hsu et al, 2009) (Moscardo et al. 1996). Studies have identified experiences that international and domestic tourists seek during their Australian holidays and the subsequent impact on the decision to visit a remote destination. Within the domestic and international tourists markets, experiences connected to heritage, adventure, geological attractions, scenery and wildlife all increase the likelihood of tourists to visit a remote destination (Ashwell 2015; Kim & Brown 2012; Taylor & Prideaux 2008). These experiences possibly aligning with those offered by remote Aboriginal enterprises brings in to question that a lack of demand results in the closure of many of these enterprises.

As a result, the marketing of both remote destinations and Aboriginal tourism enterprises needs to be considered. Analysis of regional marketing materials identified that the "Outback" was sold as one destination, with aspirational promotional messages impacting on potential visitors capacity to identify activities in which they could participate (Carson, & Taylor 2009). Although Tourism Australia has included Aboriginal tourism within marketing campaigns, low levels of awareness are consistently reported (Buultjens et al, 2010; Ruhanen et al, 2015; Ruhanen et al, 2013a; Tremblay & Pitterle 2008) with tourists perceiving the experiences as a homogenous product (Ruhanen et al, 2015). A further complexity for remote Aboriginal tourism enterprises, has been the use of Aboriginal people within Australia's tourism brand image to create a national identity, with the images used often stereotypical and reflective of a historical past (Higgins-Desbiolles & Akbar 2018).

To overcome these barriers to remote Aboriginal tourism enterprise success, marketing strategies need to be developed. Remote Aboriginal enterprises have the opportunity to create a competitive advantage by adding value to mainstream experiences (Ryan & Huyton 2000), reducing the impact of competition from other tourist attractions (Buultjens et al, 2010; McKercher et al, 2004; Ryan & Huyton 2000). To achieve this positioning strategies, need to be developed which ensure the tangible characteristics and the intangible perception of the experience are clearly differentiated from competitors in tourists' minds. Whilst positioning emphasises the distinctive characteristics of an enterprises produce offering (Kapferer 2004), before such strategies can be developed an understanding the product categories tourists associate with Aboriginal tourism is required.

To contribute to the current gap in the literature, this exploratory study intended to answer the following questions:

RQ1: "What attributes do domestic and international tourists associate with Aboriginal tourism?"

RQ2: "What similarities or differences exist between domestic and international tourists associations with Aboriginal tourism?"

3. Methods

This comparative study identifies and compares the associations domestic and international tourists have of Australian Aboriginal tourism. Two separate studies collected data using questionnaires: Study A from domestic tourists and Study B from international tourists. The questionnaires included a tick 'all that apply' option to identify the attributes participants

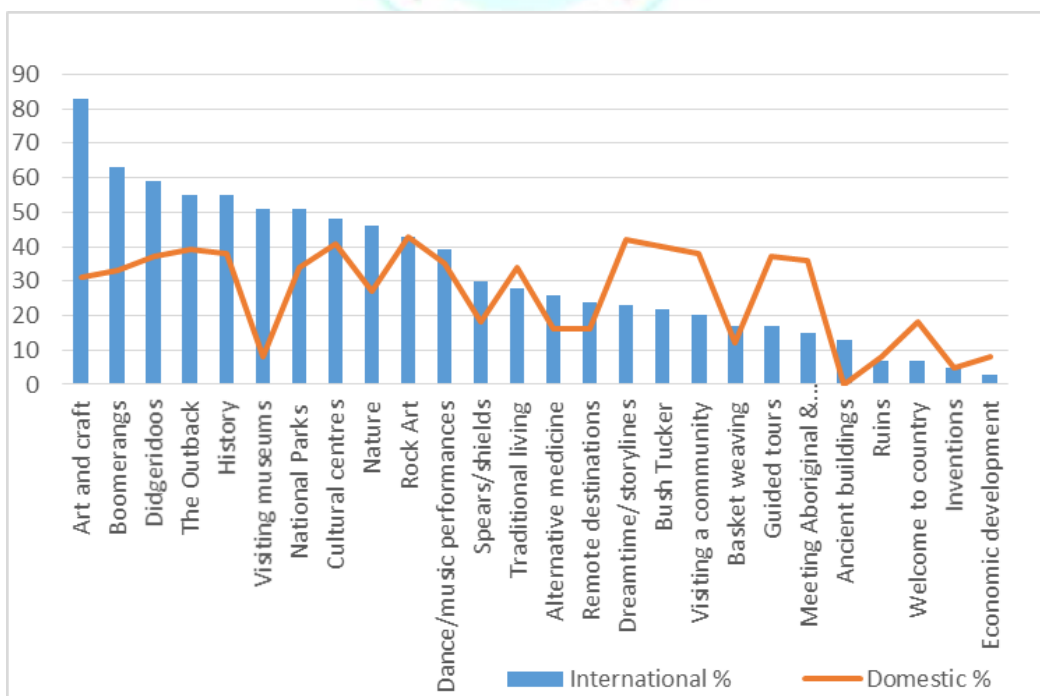
associated with Aboriginal Tourism. The attributes within both studies' surveys included a mix of activities, cultural associations and places. These were selected from the International Visitor survey, the National Visitor survey and previous research (Australia, TR 2008; Ryan & Huyton 2002).

To provide a deeper insight into tourist perceptions, participants for both studies were selected from a wider target market (Lynch et al. 2011; Ruhanen, L, Whitford & McLennan 2013b). However, tailored data collection methods were applied to each study to reflect the differences between the tourist segments. For Study A, an online survey, n=947, was used to capture potential domestic consumers associations with Aboriginal tourism. This was considered an appropriate method to access a wider target population (Sharp, Moore & Anderson 2011) to avoid social desirability response bias (Zerbe & Paulhus 1987). Within Study B, the South Australian Museum was considered an appropriate location to capture data from international tourists on holiday in Australia. The surveys were administered in person in the entrance lobby, n=148, using a next-to-pass method (Lynch et al. 2011).

4. Data Analysis

Initial descriptive analysis of the attributes associated with Aboriginal tourism was undertaken (Figure 1). To further understand the product categories associated with Aboriginal tourism, exploratory factorial analysis was undertaken enabling the identification of factors hidden in the set of attributes of the image associated with Aboriginal tourism. Items within both data sets were assessed to ensure they correlated 0.3 with at least one other item, with no variables' correlation coefficients above 0.9, as this can reflect singularity in the data (Tabachnick & Fidell 2013). Inspection of the anti-image correlation matrixes revealed that all measures of sampling adequacy were above the acceptable level of 0.5 (Coakes 2011). To determine the number of factors to be retained, the recommended cut off of 0.3 was applied for loadings to be salient to the factor (Coakes 2011). Additionally, the Guttman-Kaiser rule was applied retaining factors with an eigenvalue larger than 1 and the Scree plot examined.

Figure 1: Comparison between domestic and international tourists associations with Aboriginal Tourism



Study 1: Domestic Tourists' Associations with Aboriginal Tourism in Australia

The socio-demographic characteristics of the domestic sample were 41% of respondents male and 59% female, with age evenly distributed. Overall, domestic tourists had limited associations with Aboriginal tourism with none of the attributes having more than 50% awareness (Figure 1). The top 3 associations within the domestic market were Rock Art (43%), Dreamtime/storylines (42%) and Cultural Centres (41%). Adventure activities such as snorkelling or 4WD had lower levels of association (4% and 12% respectively).

Principal axis factoring (PAF), with Varimax rotation was conducted on the 37 items. Inspection of the anti-image correlation matrix identified that all items were above the acceptable level of 0.5 (Coakes 2011). The Kaiser-Meyer-Olkin, 0.969, marvellous, (Kaiser 1974) and the Bartlett's Test of Sphericity was significant. The initial extraction retained 4 factors with Eigenvalues above 1, representing 48.072% of the variance and labelled Cultural Learning Activities, Leisure Activities, Handicrafts and Nature. The Scree Plot confirmed the factors for extraction. Table 3 provides the rotated factorial matrix selected to represent domestic tourists' cognitive image of Aboriginal tourism in Australia. Whilst a number of complex variables were identified, it was deemed appropriate for them to remain within this analysis using current literature, the context of the study and a 0.3 cut off to guide decisions (Costello 2005). The factors were labelled: Cultural Learning, Leisure activities, Handicrafts and Nature.

The first factor was labelled "Aboriginal Culture" and accounts for 33.836% of the total variability respectively. The items which loaded on the factor reflect activities associated with active learning such as 'meeting Aboriginal and Torres Strait Islanders', 'Guided Tours' or 'Visiting a Community'. This factor also included more passive learning activities such as 'Watching a Dance/Music Performance', 'Seeing Art/Craft' and 'Rock Art'. Finally, this factor included aspects of learning connected with history such as 'Traditional Living' and 'Australian History'.

Factor 2 accounts for 7.632% of the total variability of the domestic sample and was labelled Leisure Activities, reflecting the attributes within this factor connected with leisure interests. Attributes within this factor included activities such as "Adventure Activities" and "4WD". These activities reflect the diversified product range available to tourists, whilst activities such as 'Visiting Museums' and 'Pioneers and Explorers' reflect historical connotations associated with the product. Attributes connected to a location to undertake activities are also included within this factor; 'beaches and waterways', 'isolation and uncrowded attractions'. This factor also included benefits of participating in Aboriginal tourism activities such as 'Quality' 'Family/Social Time' and 'Economic Development'. Finally, attributes of 'Agriculture', 'Invention' and 'Ruins' are within this factor. Whilst these are not commonly associated with Aboriginal tourism marketing, they may reflect a social knowledge within the domestic market.

Table 1: Factorial analysis of the attributes associated with Aboriginal tourism within the domestic tourist market

Rotated Factor Matrix ^a				
	Factor			
	1	2	3	4
Visit an Aboriginal site	.717			
Guided tours	.714			
Meeting Aboriginal & Torres Strait Islanders	.714			
Aboriginal cultural tour	.699			
Cultural centres	.663			
Dreamtime/storylines	.652			
See an Aboriginal performance	.641			
Visiting a community	.624			
Dance/music performances	.617			
Rock Art	.599			
Interactions with locals	.596			
Bush Tucker	.545			
Traditional living	.488			
Australian history	.472			
Art and craft	.419	.332		
Welcome to country				
Fresh produce		.604		
Beaches and waterways		.562		
Quality family/social time		.547		
Adventure activities		.538		
Inventions		.514		
Agriculture		.499		
Local attractions eg. museums		.489		
Pioneers and explorers		.460		
4WD exploring		.458		
Economic development		.431		
Isolation and uncrowded attractions		.427		
Ruins	.372	.413		

Boomerangs	.395		.638	
Didgeridoos	.493		.548	
Spears/shields	.433		.484	
Basket weaving	.316		.445	
Nature and wildlife	.421			.395
Breathtaking landscapes	.399	.308		.374
Iconic landmarks eg. Uluru	.534	.349		.357
Outback Australia	.517			.326
% of variance	33.836	7.632	3.659	2.946
% of cumulative variance	33.836	41.467	45.126	48.072

Extraction Method: Principal Axis Factoring.

Rotation Method: Varimax with Kaiser Normalization.^a

a. Rotation converged in 8 iterations.

The third factor labelled “Handicrafts” accounted for 3.659% of variance. Whilst these items cross loaded onto the “Aboriginal Culture” factor, the higher loading on factor 3 was used to define this factor. The decision to include this factor reflected the tourism experiences available which include making, using or purchasing these handicrafts. The fourth factor for the domestic market labelled “Nature” accounts for 2.946% of the total variability and reflects the location of Aboriginal tourism enterprises. Although these items cross loaded on two or more factors it was decided that the complex variable could be retained as it is appropriate in the context of the study (Costello 2005). Not surprisingly, ‘Uluru’ and ‘The Outback’ are included within the factor, with the benefits of these locations reflected in the attributes of ‘Nature’ and ‘Wildlife’ and ‘Breathtaking Landscapes’.

Study 2: International Tourists’ Associations with Aboriginal Tourism in Australia

The international samples showed that gender was evenly distributed, with 52% of international respondents traveling with their partner. Whilst age within the domestic sample was evenly distributed, nearly half of the international sample was under 29 years of age. 83% of international tourists associated Aboriginal tourism with “Art and Craft”, with boomerangs (63%) and didgeridoos (59%) also in the top 3 associations. Similar to domestic tourists associations with Adventure activities had the lowest level of association.

Principal axis factoring (PAF), with Varimax rotation was conducted on the 37 items. Inspection of the anti-image correlation matrix identified that National Parks, Quad Biking, Museums, CamelRiding, 4WD, Cultural Parks and Economic Development were not above the acceptable level of 0.5 (Coakes 2011), and were removed from further analysis. The PAF was undertaken for a second time, with the Kaiser-Meyer-Olkin, 0.713, middling, well above the recommended 0.5 (Kaiser 1974) and the Bartlett’s Test of Sphericity was significant. The initial extraction retained 10 factors with Eigenvalues above 1, representing 63.3% of the variance. However, examination of the Scree Plot suggested that fewer factors may be required, and further extraction of factors was undertaken to compare results. In total, six separate extractions were undertaken to examine structures between five to ten factors. The final solution selected for the international tourists’ perceived image of Aboriginal tourism in Australia presents a structure consisting of 6 factors representing 47.84% of total variance. Table 2 provides the rotated factorial matrix selected to represent domestic tourists’ cognitive image of Aboriginal tourism in Australia, with Visiting a Community, Nature, Remote Destinations and Cities complex

variables. The factors were labelled Aboriginal Culture, Outdoor Adventure, Traditional Living, Active Learning, Ruins, and Sightseeing.

Table 2: Factorial analysis of the attributes associated with Aboriginal tourism within the international tourist market

	Factor					
	1	2	3	4	5	6
Boomerangs	.733					
Didgeridoos	.640					
Spears/shields	.584					
Bush Tucker	.491					
Dance/music performances	.478					
Dreamtime/storylines	.437					
The Outback	.408					
Art and craft	.353					
Kayaking		.637				
Fishing		.600				
People like me		.586				
Dolphin/Whale watching		.311				
Traditional living			.592			
History			.530			
Alternative medicine			.461			
Nature			.411		.339	
Rock Art			.395			
Visiting a community			.315		.304	
Basket weaving			.301			

Guided tours				.613		
Welcome to country				.424		
Cultural centres				.363		
Meeting Aboriginal & Torres Strait Islanders				.301		
Cities				.391		.587
Ruins					.639	
Ancient buildings					.466	
Remote destinations			.356		.426	
Snorkelling						.391
Bush walking						-.384
% of variance	18.175	8.43	5.986	5.599	4.974	4.674
% of cumulative variance	18.175	26.613	32.599	38.198	43.171	47.845

- a. Extraction Method: Principal Axis Factoring.
Rotation Method: Varimax with Kaiser Normalization.
- b. Rotation converged in 8 iterations.

Factor 1 labelled 'Aboriginal Culture' accounts for 18.175% of the total variability and identified Aboriginal tourism as associated with traditional artefacts such as boomerangs, didgeridoos, spears, and shields. In addition, this factor included activities associated with Aboriginal culture: dance/music performance, art/craft, bush tucker and dreamtime/storylines; and location in the Outback. The combinations of these elements reflect tangible elements of the Aboriginal culture, commonly used within tourism promotional material.

Factor 2 labelled 'Outdoor Adventure', accounts for 8.43% of the total variability and includes the characteristics of kayaking, fishing, dolphin/whale watching, and people like me. These attributes reflect a diversified Aboriginal tourism sector. Factor 3 labelled 'Traditional Living', accounts for 5.986% of the total variability and includes the attributes of traditional living, basket weaving, history, and rock art, visiting a community, alternative medicine and nature.

The fourth factor labelled 'Active learning', had attributes of Guided tours and Cultural centres which are associated with learning new knowledge. Within this factor, 'Welcome to Country' and 'Meeting Aboriginal and Torres Strait Islanders' were also included. This may reflect that international tourist perceive Aboriginal tourism activities involving guided tours or visiting cultural centres will also provide opportunities to engage with Aboriginal and Torres Strait Islanders to enhance the learning experience.

Factor 5 labelled 'Ruins', accounts for 4.974% of the total variance and includes three attributes ruins, ancient buildings and remote destinations. Whilst the first two of these attributes are not commonly associated with Aboriginal tourism in Australia, they may reflect misperceptions that international tourists may hold. Understanding this is important when developing positioning strategies, as they may reflect what international tourists perceive they will participate in during an Aboriginal tourism experience. The final factor had two attributes cities and snorkelling. The two attributes, both had low levels of awareness amongst international tourists, and therefore this factor may not be meaningful.

5. Conclusion

Aboriginal Australian cultural knowledge looks, sounds and feels different to that of non-Indigenous Australians, which can be viewed as a unique opportunity to market a distinctive product (Akbar & Sharp 2012). In a highly competitive market, it is imperative that tourists are aware of products and services offered by remote Aboriginal tourism enterprises. Whilst low awareness amongst tourists has been previously identified as an issue affecting participation (Buultjens et al, 2010; Ruhanen et al, 2015; Ruhanen et al, 2013a; Tremblay & Pitterle 2008), this study seeks to further contribute to the literature by identifying the attributes that tourists associate with Aboriginal tourism. Whilst the findings highlight that a limited range of attributes are associated with Aboriginal tourism, the analysis has provided some key insights which can be used to inform marketing strategies.

To overcome issues related to remote destinations, the study considered the connection between place and Aboriginal tourism. Within both samples the term “Outback” had a greater level of association with Aboriginal tourism than the term “Remote” or “Cities.” However, the overall association with the “Outback” remained low with 55% of international tourists associating this place with Aboriginal tourism and less than half of the domestic market. Ryan and Huyton(2002) highlighted that the growth in urban Aboriginal tourism experiences may directly impact on remote Aboriginal tourism enterprises. To overcome issues associated with market access, positioning strategies need to emphasize heterogeneity of product offerings demonstrating how experiences differ between urban and remote destinations, and the benefits tourists will gain by travelling to these remote areas.

A high proportion of international tourists associated “Art and Craft” with Aboriginal tourism, and due to its positive influence on tourists’ willingness to travel to a remote destination (Ashwell 2015), this is advantageous for the remote Aboriginal tourism and art industries. Yet, despite some belief within the domestic market that Aboriginal art is an important element of Aboriginal culture, this study found that they have low levels of association of art with Aboriginal tourism. Due to domestic tourists’ increased propensity to travel to a remote destination (Athanasopoulos & Hyndman 2008), this study endorses the perspective of Bridson et al., (2015, p.26) who recommended further research to be undertaken related to “the marketing of, and audiences for, Aboriginal and Torres Strait Islander art”.

Whilst contemporary tourism activities such as Whale Watching, Kayaking and Fishing, increase the likelihood of both domestic and international markets to travel to remote destinations (Ashwell 2015; Kim & Brown 2012), these attributes are not associated with Aboriginal tourism. These findings imply that tourists will be unlikely to recall Aboriginal tourism when searching within a range of product classes connected to adventure. This further suggests that even if tourists intend to travel to a remote destination to participate in these activities, they are unlikely to search for an Aboriginal operator. Whilst early studies suggested Aboriginal operators have the opportunity to add value to mainstream products (Ryan & Huyton 2000), the low level of awareness of the diversified product range may prevent this from occurring. Consequently, more active marketing to define the Aboriginal tourism product range available in remote Australia is needed. Future research should also include investigation of how marketing findings are implicated at industry level(Akbar 2016).

As with all studies, it is acknowledged that there are limitations to this study. The data used in this exploratory study was collected in two separate studies, with different sample sizes. Future research can be undertaken to further examine the positioning of Aboriginal tourism in tourists’ minds. Consideration to the sample could be undertaken including further defining the geographic location of the tourists, for example country and region, motivations to travel and

activity selection, and the influence of socio-demographic characteristics. Finally, future research could pilot marketing and communication styles and techniques to determine effectiveness on potential consumers while ensuring that Aboriginal and Torres Strait Islander tourism operators are the driving force behind this unique marketing opportunity (Akbar & Higgins-Desbiolles 2017).

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