

Visitor Experience and  
Expectations Research  
(VEER) 2022-23

September 2023

Aboriginal Experiences

# Background and Methodology

## Objective

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

## Sample

The survey involved 400 face to face intercept interviews with international and interstate visitors on holiday in WA for 2 or more nights, and WA residents who were currently on a WA short break/holiday or who had holidayed in WA in the past 6 weeks.

## Timeline

Fieldwork was conducted by Thinkfield in 2022-23 in three waves over the course of the year from September 2022 to June 2023.

## Travel restrictions

Due to travel restrictions in 2020 and 2021 it was not possible to survey interstate and international visitors so those years have been excluded from analysis.

## Comparison

Significant difference testing has been included throughout this report. The green squares /upward pointing arrows represent a significantly higher score and the red squares/downward pointing arrows represent a significantly lower score at 95% confidence level. Significant difference testing has been shown between years and 2022-23 total against visitor type subgroups.

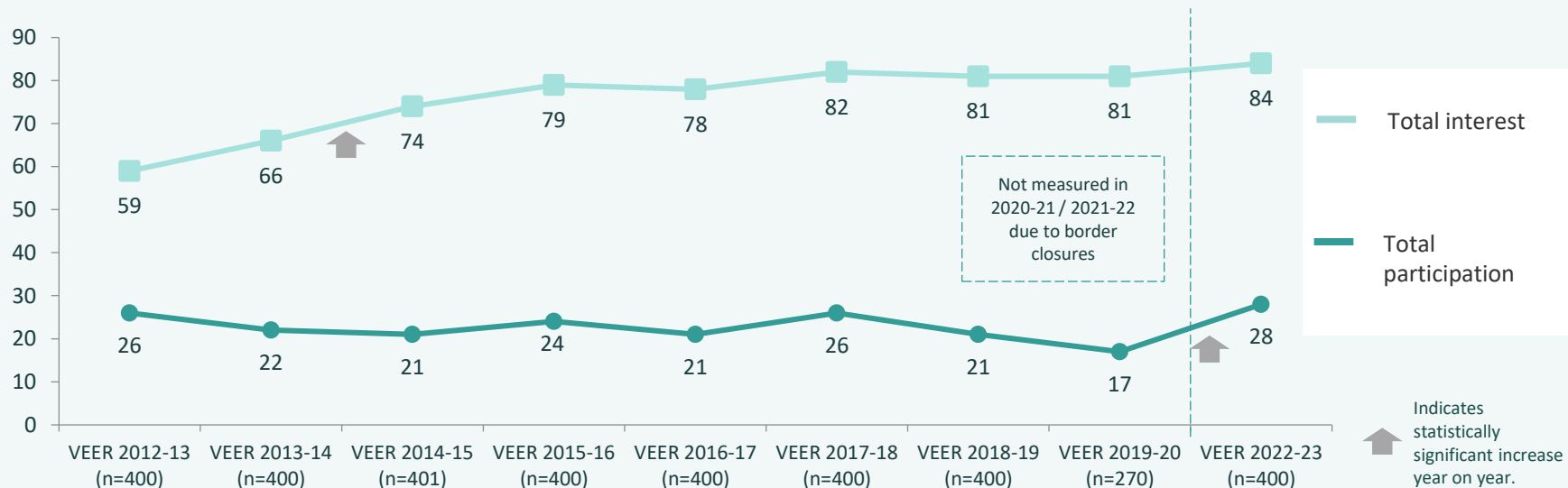
## Sample Structure

Interview Location	Total	Intrastate	Interstate	International
City of Perth	70	11	30	29
Perth Visitor Centre	33	4	8	21
Kings Park	26	6	10	10
Elizabeth Quay	50	13	22	15
Fremantle	71	15	27	29
Mandurah	50	35	9	6
Other Perth	100	48	21	31
TOTAL	400	132	127	141

# Interest and participation in Aboriginal tourism

Visitor interest in Aboriginal experiences continued to far outweigh participation in the tourism offer in 2022-23. More than eight in ten visitors (84%) would be interested in experiencing an Aboriginal tourism experience or activity if it were easily accessible in WA, however less than three in ten visitors (28%) participated in Aboriginal tourism during their WA holiday. Both interest and participation were the highest since tracking began in 2012-13.

Overall interest and participation in Aboriginal tourism by year %

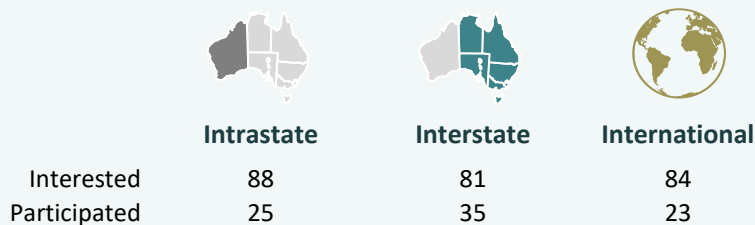
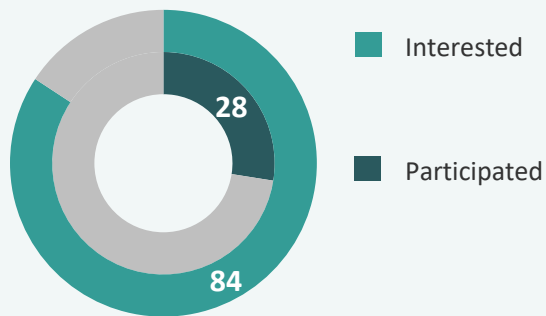


SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia? Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia? Note, "Experience Native bush food" was added to list of Aboriginal tourism experiences in 2017-18, which has resulted in a higher result for total interest from 2017-18. BASE: All respondents, 2022-23 n=400, 2019-20 n=270, 2018-19 n=400; 2017-18 n=400; 2016-17 n=400; 2015-16 n=400; 2014-15 n=401; 2013-14 n=400; 2012-13 n=400

# Interest and participation in Aboriginal tourism

The growth in both interest and participation compared to 2019-20 are driven by domestic visitors. “Experience Native Bush Food” and “Go on a tour with an Aboriginal guide” generate the most interest, and also the largest gap between interest and participation, indicating a potential opportunity for development. Visiting Aboriginal galleries and seeing art, craft or cultural displays were the most common activities undertaken.

2022-23 interest and participation in Aboriginal Tourism by Visitor Type



2022-23 Participation in aboriginal tourism



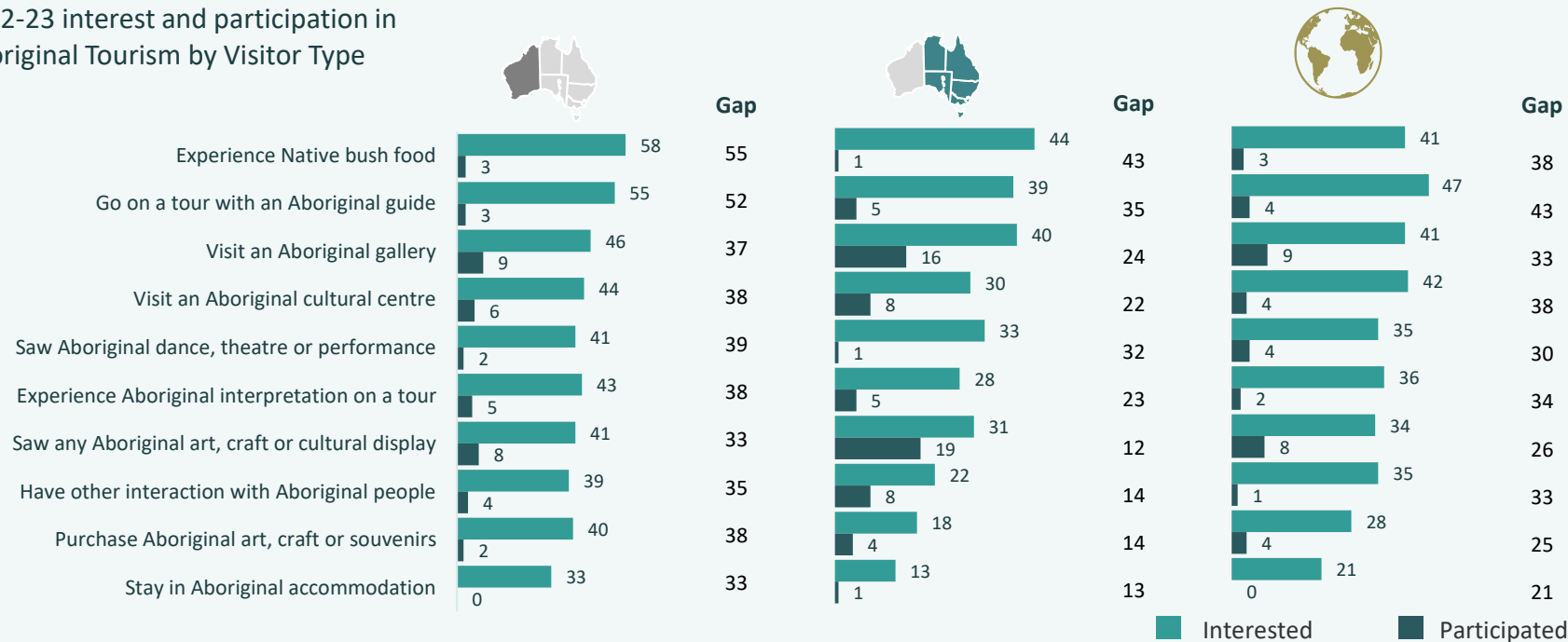
4 • SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia? Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia? BASE: All respondents n=400.



# Interest and participation in Aboriginal tourism

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

2022-23 interest and participation in Aboriginal Tourism by Visitor Type



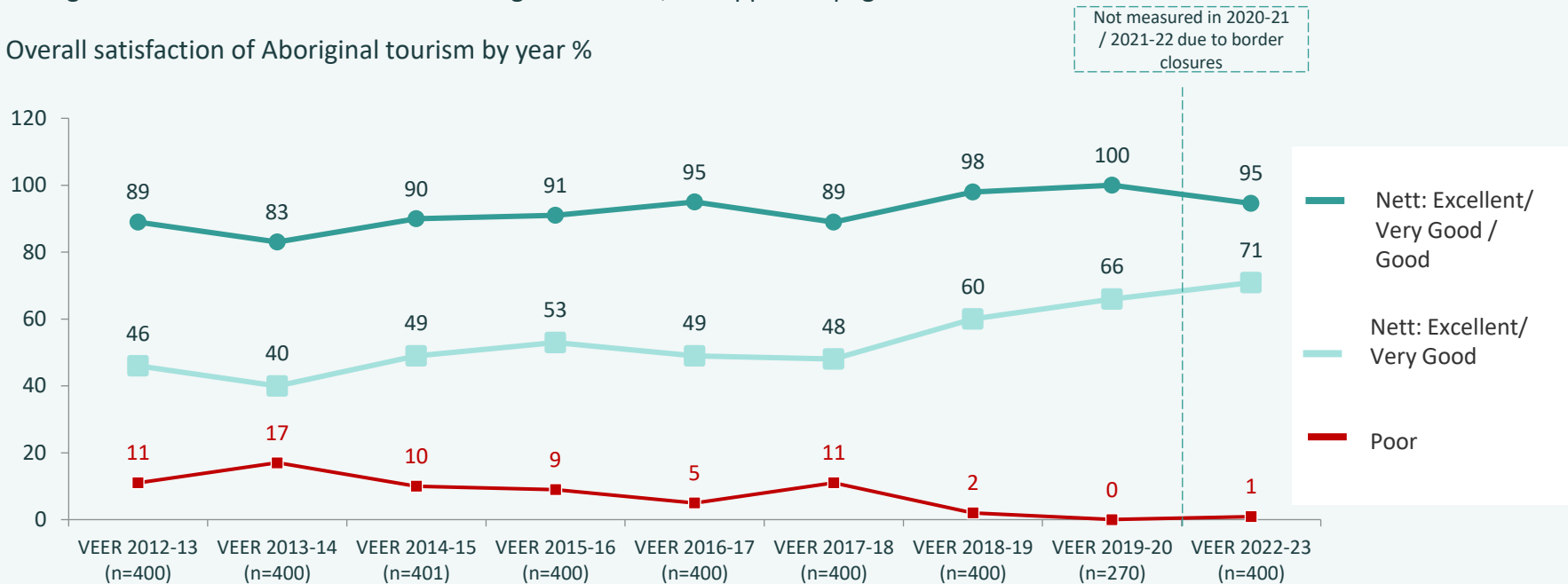
Interested Participated

5 • SOURCE: Q12. Which of the following Aboriginal activities or experiences have/did you participate/d in during your holiday in Western Australia? Q13. And which of these experiences or activities would you be interested in, if they were easily accessible in Western Australia? BASE All respondents n=400; Intrastate visitors n=132; Interstate visitors n=127; International visitors n=141..

# Satisfaction of Aboriginal tourism

Those visitors who had participated in an Aboriginal activity continue to rate their experience highly. 71% rated their experience as 'excellent' or 'very good', an increase of 5% points on 2019-20 and the highest since tracking began. Satisfaction was highest amongst interstate visitors and lowest amongst intrastate, see appendix page 41 for more details.

Overall satisfaction of Aboriginal tourism by year %



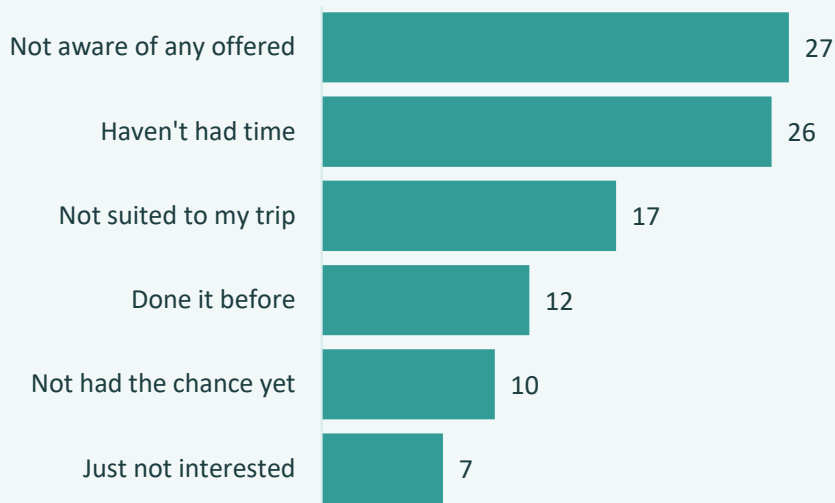
6 • SOURCE: Q14. And using this scale, can you please rate overall the Aboriginal activities and experiences you experienced in Western Australia? BASE: All respondents who participated in an Aboriginal activity, 2022-23 n=110, 2019-20 n=47, 2018-19 n=83; 2017-18 n=103; 2016-17 n=85; 2015-16 n=95; 2014-15 n=83; 2013-14 n=86; 2012-13 n=102.



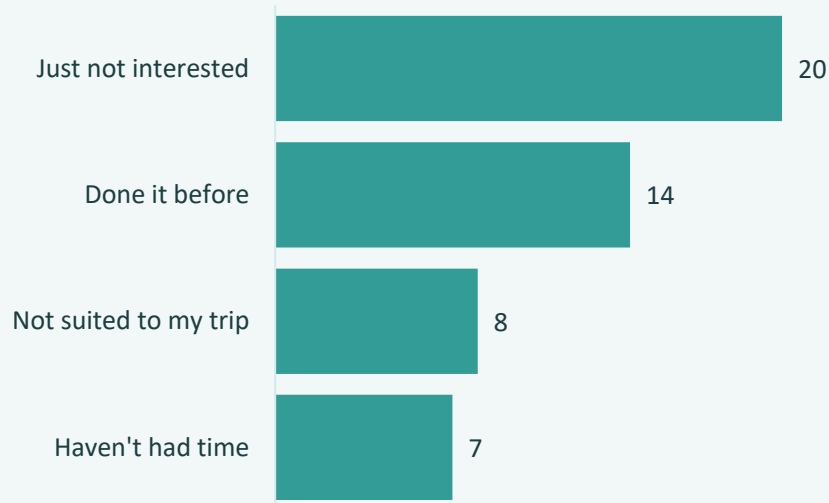
# Non-participation in Aboriginal Tourism

More than quarter (27%) of those who did not participate in Aboriginal tourism experience said they did not come across any during their trip. Another quarter (26%) cited lack of time. For those who were not interested, their main reasons were a lack of enthusiasm and a feeling of 'been there, done that'. Upselling the breadth and uniqueness of experiences available in WA may help to overcome these barriers.

2022-23 Non-participation in Aboriginal Experience %



2022-23 Non-interest in Aboriginal Experience %



*Mentions 5% of more shown.*

SOURCE: Q16. Can I ask why you chose to not participate in Aboriginal activities or experiences? BASE: Respondents who had not participated in an Aboriginal activity n=290. Q17. Why are you not interested in participating in an Aboriginal activity or experience in Western Australia? BASE: Respondents who were not interested in an Aboriginal activity n=56.