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

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

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

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

- Experiencing a different culture is considered to be a key aspect of a holiday. Australians, however, do not immediately perceive different destinations throughout Australia to provide a sufficient range of cultural diversity to justify travelling for this reason.

- Culture makes a destination authentic – it represents the unspoiled nature of the destination and its personality. Genuine interactions with locals are perceived as most authentic, while ‘staged’ culture is a turn-off and easily spotted.

- People want opportunities to experience culture but have varying levels of how they want to do this – based on their comfort levels.

- Depending on the level of desired cultural engagement, three segments emerged referred to in this study as ‘Observers’, ‘Intrigued’ and ‘Immersives’. 
Observers - approx 12.4% of the interstate population.
More interested in the overall tourism experience. Culture is a by-product of travelling to another place.

43% prefer culture from a distance
57% take photos for later

Look to museums for cultural engagement

44 average age
35% 18-34, 34% 55-70

63% Married, 21% Single
Intrigued - approx 12.4% of the interstate population
Interested in visiting friends and connecting yet non confrontational cultural experiences.

AVERAGE AGE
48
35% 18-34, 34% 55-70

55% Married, 45% Single

Want a blend of comfort and challenge
Prefer short cultural experiences
Planned and considered as part of travel
Immersive - approx 13.9% of the interstate population

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

Want to build memories and live in the moment

Prefer longer cultural experiences

Personal connection, to learn, to make something

56% Women, 44% Men

60% Married, 26% Single

AVERAGE AGE 41

38% 18-34, 21% 55-70
Aboriginal culture can be polarising in Australia. Some have stereotypical views while others are in wonder of its breadth and heritage.

- **67%** want to visit sacred rock art sites. **47%** are willing to pay.
- **64%** want to learn about Aboriginal beliefs and connection to land. **39%** are willing to pay.
- **60%** want to hear stories about the Dreamtime. **36%** are willing to pay.

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

33% Of Interstate population are interested in cultural experience when on holiday
Aboriginal cultural experiences in the Northern Territory

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

85% of respondents believed that the NT was the best place to experience the Aboriginal culture.

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

NT’s culture could be experienced at a variety of locations.