



ANCIENT CULTURES MEET: CHINESE TRAVELLERS' PERCEPTIONS AND DEMAND FOR AUSTRALIAN FIRST NATIONS TOURISM EXPERIENCES



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ACKNOWLEDGEMENT OF COUNTRY

We acknowledge the Traditional Owners of the land of Australia and pay our respects to Elders past and present. We recognise and honour the enduring connection of Aboriginal and Torres Strait Islander peoples to Country, culture, and community. Through the Ancient Cultures Meet project, we celebrate and share the richness of Aboriginal culture, fostering understanding, respect, and collaboration for a stronger, more inclusive future with Chinese visitors to Australia.

ABOUT WAITOC AND EDITH COWAN UNIVERSITY



WAITOC is the premier Aboriginal advocacy body educating and informing government and industry on the needs of Aboriginal tourism businesses and their market.

WAITOC empowers its members to embrace their cultural identity in order to honour and respect their ancestors and Elders, both past and present. With traditions of the oldest living culture restored, the outcomes at a social and economic level become more progressive and offer the opportunity to create pride in its people.

Showcasing these traditions fosters current and potential market understanding, sensitivity, and awareness. Appropriate access and engagement with these traditions is a key consideration for developing a sustainable Aboriginal tourism industry in Australia. WAITOC's corporate values encompass both traditional and commercial components but are clearly differentiated as they give priority to the culturalisation of commerce and not the commercialisation of culture.



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FOREWORD

Professor Sam Huang

- Professor of Tourism & Services Marketing
- Professorial Research Fellow and Head of SBL Centre for Tourism Research (SBLCTR) in ECU's School of Business and Law



In today's global trade and economic landscape, tourism plays a vital strategic role as a driver of national growth and prosperity. For Australia, China remains the most significant contributor to its tourism economy. In the year ending June 2025, Chinese visitors topped all inbound markets, contributing \$9.8 billion to Australia's national economy and accounting for 26% of total international visitor spending.

Australia's First Nations cultures represent one of the country's most distinctive and valuable cultural and tourism assets. Yet, within the Chinese visitor market, the potential of these assets has not been fully realised in terms of operational revenues and profitability—particularly for Indigenous tourism operators who are custodians of these unique cultural experiences.

We are therefore proud to partner with the Western Australian Indigenous Tourism Operators Council (WAITOC) to deliver this important and timely research project, supported by the National Foundation for Australia-China Relations. This collaboration addresses a critical industry challenge by providing actionable insights into Chinese outbound travellers' perceptions, expectations, and demand for Australian First Nations tourism experiences.

The findings presented in this report will assist Indigenous tourism operators in Australia to better understand the needs and preferences of the Chinese market, develop culturally authentic and appealing tourism products, and design effective marketing and pricing strategies. Ultimately, we hope this work will contribute to the creation of meaningful, memorable experiences for Chinese visitors while supporting the sustainable growth of First Nations tourism.

By strengthening the connection between Australia's First Nations cultures and the Chinese travel market, we believe this project will help foster a new growth frontier for Australian tourism and enhance the nation's overall competitiveness in the global tourism landscape.

Robert Taylor

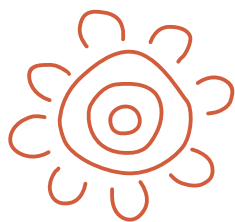
- Chief Executive Officer
- Western Australian Indigenous Tourism Operators Council



The Ancient Cultures Meet project represents an important milestone for Aboriginal tourism in Australia — and for realising the vision of ensuring that our people’s stories are shared, understood, and valued both here and abroad. From the beginning, our goal has been to create meaningful bridges between cultures, grounded in respect, authenticity, and shared experience. This project demonstrates how genuine partnerships — between community, research, and industry — can generate knowledge that leads to real opportunity.

The findings reaffirm what we know from experience: that Aboriginal tourism has the power to inspire understanding, pride, and sustainable growth for Australia as a tourism destination. They also serve as a guide to the work still ahead if we are to truly raise the bar for our sector — strengthening collaboration, improving accessibility, and building the sophisticated capacity needed to ensure our culture is presented authentically and proudly to Australia’s largest tourism export market, China.

WAITOC is proud to have led this initiative, and we gratefully acknowledge the National Foundation for Australia–China Relations for its vital support in making it possible. We also thank our members and partners for walking this path with us toward a stronger, more connected future.



James Clarke

- Project Manager- Ancient Cultures Meet
- Western Australian Indigenous Tourism Operators Council



Australia and China share a long history of exchange — commercial, cultural, and personal. Tourism is one of the most tangible expressions of that connection, offering a bridge through which people experience not only landscapes, but the living stories of our communities. The Ancient Cultures Meet project was established to strengthen that bridge by helping Australia’s First Nations tourism sector connect more meaningfully with the Chinese market. Through workshops, research, and an immersive famil program, this initiative has provided new insights into how Chinese travellers perceive and experience Aboriginal culture, and how those experiences can be more effectively shared.

The findings highlight both the opportunity and the challenge ahead. Chinese visitors already associate Australia with natural beauty; the next step is to reveal the depth of its cultural heart. Achieving this requires collaboration — between Aboriginal operators, government, and the China travel trade — to co-create experiences that are authentic, accessible, and resonant.

This project demonstrates what can be achieved when diverse partners work with shared purpose. It lays the foundation for a new chapter of two-way cultural understanding — one in which Aboriginal tourism stands proudly as a defining expression of Australia’s identity, and as a meaningful point of connection with our most important market.



EXECUTIVE SUMMARY



Australia’s Aboriginal tourism sector holds significant untapped potential in the Chinese market. The research undertaken through this project confirms that Chinese travellers have strong interest in authentic cultural experiences, yet Aboriginal tourism remains underdeveloped, under-promoted, and often misunderstood. This report provides the most comprehensive analysis to date of how Chinese travellers perceive and engage with Aboriginal tourism, and what changes are required across the tourism value chain to unlock this opportunity. Unlocking greater participation from Chinese visitors — currently estimated at just 13% — represents an unrealised opportunity worth billions of dollars in additional annual value for Indigenous tourism.

Drawing on extensive fieldwork and data from multiple stakeholder groups—including Chinese consumers, key distribution partners (KDPs), inbound tour operators (ITOs), and Indigenous Tour Operators via on-the-ground participant observation—this study reveals a consistent pattern: demand exists, but the systems surrounding Aboriginal tourism are not currently aligned to support scale. Awareness in China is low, delivery in Australia varies in readiness, national branding is fragmented, and system-level coordination is lacking. A coordinated, multi-layered strategy is therefore required.

Purpose of the Study

The purpose of this research is to understand how Aboriginal tourism can become a more visible, compelling, and commercially viable part of Australia’s offering to Chinese travellers. The study aims to diagnose the structural, cultural, and commercial barriers preventing Aboriginal tourism from scaling in the China market, and to propose practical, evidence-based recommendations for government, industry, and Aboriginal tourism operators.

What Makes This Study Unique

This project adopts a whole-of-market, multi-lens research approach that examines Aboriginal tourism across every major link of the China–Australia tourism value chain:

Chinese Consumers

To assess cultural awareness, motivations, values, and willingness to participate in Aboriginal tourism.

Chinese Key Distribution Partners (KDPs)

To understand how Aboriginal tourism is currently perceived, packaged, and promoted in China, and what information gaps or commercial barriers prevent stronger distribution.

Australian Inbound Tour Operators (ITOs)

To analyse logistical constraints, sales readiness, itinerary-building practices, and the degree to which Aboriginal experiences are feasible to package and scale.

Indigenous Tour Operators via On-the-Ground Participant Observation

By observing Chinese visitors engaging directly with Aboriginal operators, we examined how interpretation, pacing, interactivity, storytelling, and cultural resonance actually play out in real time.

Key Findings



1. Interest is high, but awareness is low.

Chinese travellers express strong curiosity about Aboriginal culture, yet lack foundational understanding of its heritage, practices, values, and modern identity. Low cultural literacy suppresses demand.



2. Aboriginal experiences are challenging to promote in China today – yet hold exceptional potential as a future product differentiator.

Chinese KDPs report that Aboriginal tourism is difficult to explain and sell in its current form due to low digital visibility, limited Mandarin materials, and unclear value propositions.

At the same time, they consistently emphasise Aboriginal culture as Australia’s untapped competitive advantage—the one dimension capable of delivering genuine cultural depth and differentiation.

Our researchers learned that KDPs often say: “To experience culture, go to Europe; to enjoy scenery, come to Australia.” Yet they stressed that Aboriginal experiences could become the exception—if strengthened and made more accessible.



3. Experience delivery in Australia does not yet match the expectations of Chinese travellers.

Chinese visitors prefer experiences that are interactive, hands-on, structured, photo-friendly, and well-paced. Many Aboriginal experiences remain heavily narrative or observational, leading to a mismatch between product format and market expectations.



4. Cultural competency and interpretive capacity are the most significant barriers.

The barrier is not only language. It includes:

- limited Mandarin interpretation
 - limited cultural competency among some guides
 - inconsistent depth of storytelling
 - lack of tools for translating Aboriginal meaning into Chinese cultural frames
 - reliance on tour leaders without Aboriginal cultural training
- These issues cause meaning to be lost and limit emotional connection.



5. Branding is fragmented and lacks a unified cultural identity.

To ensure the comprehensiveness of this report, our research also examined comparable First Nations and Indigenous cultural tourism offerings from around the world—including minority people groups with highly popular offerings among Chinese travellers. This analysis confirmed that Australia does not currently have a nationally recognised Aboriginal cultural “signature” that functions like:

- the Māori haka in New Zealand,
- the First Nations cultural centres of Canada,
- the Native American cultural villages in the United States,
- the Sámi cultural hubs in Nordic countries, or
- the Miao, Dong, and Yi cultural villages in China, which have developed iconic symbols, craft traditions, and immersive experience formats that domestic Chinese travellers immediately associate with cultural authenticity.

In China, minority cultural villages serve as powerful anchors that combine symbolic identity, hands-on cultural practice, and consistent experiential staging. The absence of a similarly recognisable Aboriginal “signature” impacts on Australia’s cultural positioning in the China market.



6. System-level coordination, governance, and infrastructure are insufficient to support scale.

There is no unified national strategy for Aboriginal tourism focused on the China market. Investment is fragmented, long-term capability-building is limited, and national-level governance is inconsistent.

To have a deep cultural experience, Chinese travellers are encouraged to travel to Europe rather than Australia.

Image courtesy of BungleBungle Guided Tours



Gap Analysis (in summary)

The analysis revealed four interconnected categories of structural gaps:

- Theme 1 — Demand-Side Activation

Low cultural literacy in China, limited digital presence, minimal Mandarin content, weak China-market storytelling, and no national China-facing strategy.
- Theme 2 — Supply-Side Development

Limited China-readiness among operators, interpretation barriers, insufficient interactivity, accessibility challenges, variable professionalism, and fragmented supply chain partnerships.
- Theme 3 — National Branding & Cultural Positioning

No unified Aboriginal cultural identity, no flagship cultural hubs, and inconsistent branding across states.
- Theme 4 — Enablers & System Architecture

Weak governance, limited long-term funding, inadequate infrastructure, minimal market intelligence, and no structured pathway for repeat visitation.

Note: the full gap analysis can be found in part 7 of the report.

Recommendations (in summary)

Based on this analysis, the report proposes a set of coordinated actions across the same four themes:



Together, these recommendations provide a strategic roadmap for elevating Aboriginal tourism as a distinctive, culturally rich, and sustainable offering for Chinese travellers.

Note: the full recommendations can be found in part 8 of the report.

Image courtesy of Kimberley cultural Adventures

PART 1:INTRODUCTION

First Nations cultures represent invaluable assets for the development of a nation’s tourism industry. Around the world, Indigenous cultures are increasingly recognised not only for their intrinsic cultural value but also for their potential to provide authentic, meaningful experiences that enrich national tourism offerings. In the case of Australia, Aboriginal and Torres Strait Islander cultures are the oldest continuous living cultures on earth, with histories stretching back more than 65,000 years. Despite this unique and profound heritage, Australia's Aboriginal tourism sector remains relatively underdeveloped compared to countries such as New Zealand and Canada, where Indigenous tourism has been more successfully integrated into national tourism strategies.

At the same time, global demand for Indigenous experiences is strong. Tourism Australia’s recent Consumer Demand Project (CDP) found that 82% of international travellers seek opportunities to engage with Indigenous people or cultures when travelling [1]. However, awareness of the Indigenous tourism experiences offered in Australia remains limited. For Chinese travellers in particular, the research reveals both opportunities and challenges.

Tourism Australia research shows that while 82% of international travellers seek opportunities to engage with Indigenous culture, awareness of Australia's Indigenous tourism experiences remains low.

Recognising these dynamics, this study—Ancient Cultures Meet: **Chinese Travellers' Perceptions and Demand for Australian First Nations Tourism Experiences**—was designed to generate new insights into Chinese travellers' awareness, perceptions, and demand for Aboriginal tourism in Australia. A mixed-methods approach was adopted to capture perspectives from both the key tourism industry operators and the travellers, comprising three key components:

- 1
focus group interviews
with ITOs and KDPs
- 2
a large-scale survey with
Chinese visitors
- 3
participant
observation

This report brings together findings from all three components, providing the most comprehensive analysis to date of how Aboriginal tourism can be better positioned to meet the expectations of Chinese travellers. In doing so, it highlights the scale of the opportunity, the barriers to engagement, and the practical steps that industry and government can take to strengthen Australia's position as a destination where the world's oldest living culture is celebrated and shared with one of its most important visitor markets.

The economic opportunity

China remains Australia's highest-value international tourism market, generating **\$9.8 billion** from 892,000 trips in the year ending June 2025[2]. However, only around 13% of Chinese visitors currently participate in an Indigenous or First Nations tourism experience [3][4]. While available data does not allow the economic value of increased participation to be precisely quantified, the scale of the Chinese visitor market means that **even a modest increase in engagement with First Nations tourism could translate into hundreds of millions of dollars in additional visitor expenditure over time**. This represents a significant opportunity to grow demand for First Nations tourism experiences, support sustainable employment and enterprise development, and increase the share of Australia's visitor economy flowing to Indigenous or First Nations tourism operators and communities.

PART 2: METHODOLOGY

Research Design

This study employed a mixed-methods design to examine Chinese travellers' perceptions of, and demand for, Aboriginal tourism in Australia. The research combined quantitative and qualitative approaches:

- (1) a large-scale online survey of Chinese travellers
- (2) focus group interviews with Australia's China-facing inbound tourism operators (ITO's) and Australia's key distribution partners (KDP's) in China
- (3) participant observation with Chinese visitors on Aboriginal tourism field tours.

Focus Group Interviews

Six focus groups were conducted in May–July 2025 to capture insights from both source and destination markets. Two sessions were held in Australia with inbound tour operators (ITOs, N=10), while four sessions were held in China with key distribution partners (KDPs, N=29) across major cities including Shanghai, Beijing, Guangzhou, Shenzhen, and others. In total, 39 participants contributed to the discussions, providing balanced perspectives on the opportunities and challenges facing Aboriginal tourism (Table 1).

Table 1 Overview of Focus Group Interviews

Group Type	Session ID	Date	Time	No. of Participants	Participant Location Distribution
Australia – ITOs	#01-ITO	May 26, 2025	13:00–14:30	5	4 Western Australia, 1 Eastern Australian States
	#02-ITO	May 27, 2025	13:00–14:30	5	4 Eastern Australian States, 1 Western Australia
China – KDPs	#01-KDP	July 8, 2025	11:00–12:30	8	5 Shanghai, 3 Zhejiang
	#02-KDP	July 10, 2025	11:00–12:30	5	5 Beijing
	#03-KDP	July 14, 2025	11:00–12:30	8	2 Shenzhen, 1 Hunan, 2 Fujian, 3 Guangzhou
	#04-KDP	July 16, 2025	11:00–12:30	8	1 Hubei, 1 Sichuan, 1 Henan, 2 Chongqing, 1 Shanghai, 1 Zhejiang, 1 Jiangsu

Total Participants: 39 (Australia: 10; China: 29)

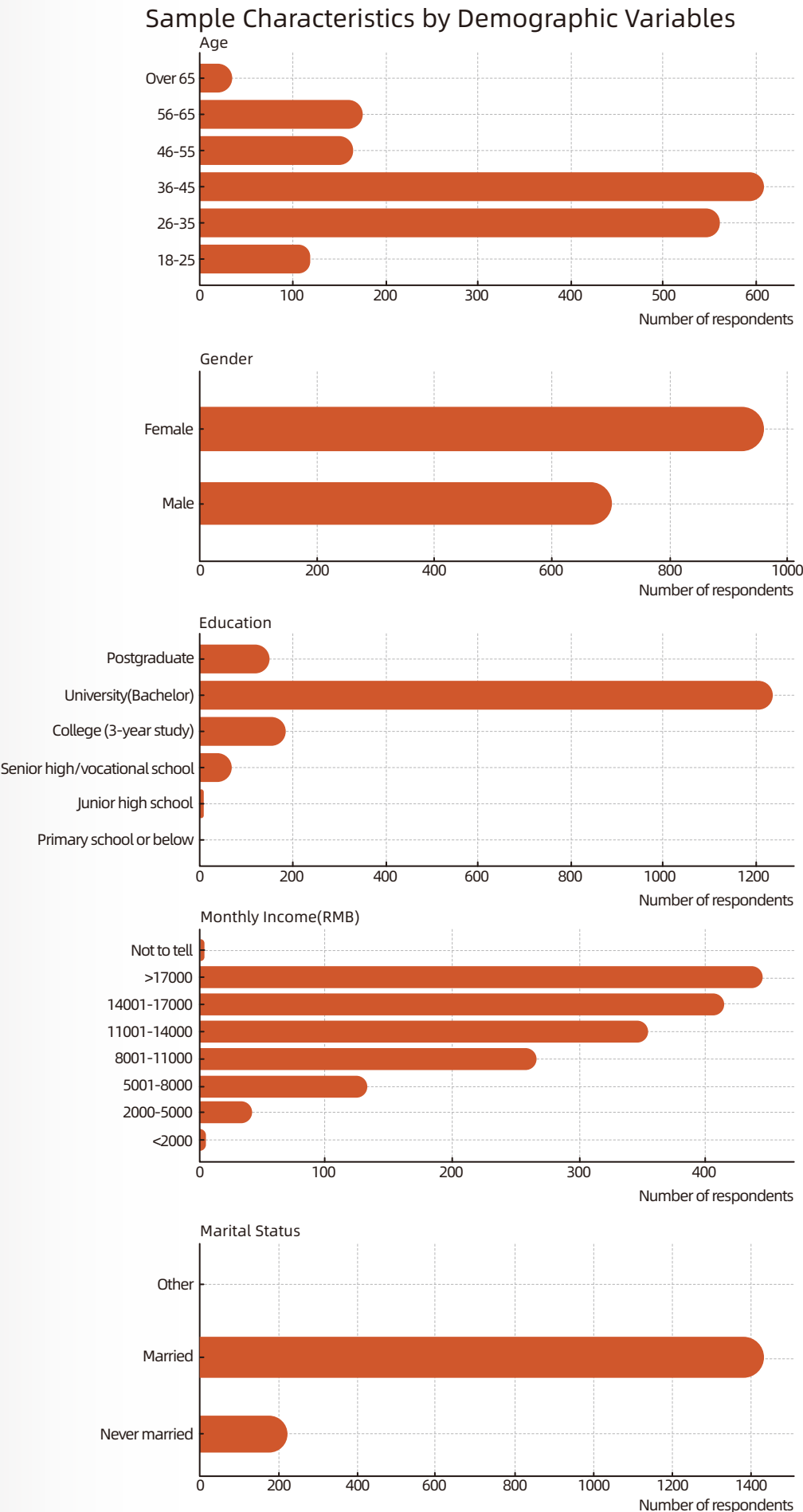
ITO=Inbound tour operators; KDP= Key distribution partners

Survey

A large-scale online survey was conducted between November to December 2024 with Chinese-speaking participants recruited through the LightSpeed platform. Eligible respondents were aged 18 or older. Informed consent was obtained, and participation was incentivised through reward points. After data cleaning, 1,663 valid responses were retained for analysis. The sample demographic characteristics are shown in Figure 1.

The survey instrument measured travel history, awareness and perceptions of Aboriginal tourism, cultural values, destination image associations, and demographic information. Questions were administered in Mandarin Chinese to ensure linguistic and cultural appropriateness. Analytical techniques included descriptive statistics, text mining of free-response data, topic modelling, and predictive modelling using Random Forest and logistic regression to identify key determinants of Aboriginal tourism interest.

Figure 1 Demographic profile of the survey sample



Participant Observation

Finally, participant observations were conducted during field tours (Table 2) of Aboriginal tourism sites in Australia, accompanying Chinese visitors to capture first-hand behaviours, reactions, and cultural interpretations. These insights were used to triangulate findings from the survey and focus groups, strengthening the validity of the study.

Table 2 Overview of field tours

Date	Time	Participants	Origin(city/region)	Field/Location
May 17, 2025	09:00–10:30	11	Hong Kong (4); Taiwan (3); Mainland China (4)	Kings Park
May 17, 2025	11:00–12:00	14	Mainland China (14)	Kings Park
Oct 20, 2025	17:00–21:00	3	Mainland China — Beijing (1), Nanjing (1), Guangzhou (1)	Gather Foods
Oct 21, 2025	09:00–17:00	3	Mainland China — Beijing (1), Nanjing (1), Guangzhou (1)	Whiteman Park; Fremantle
Oct 22, 2025	09:00–22:00	3	Mainland China — Beijing (1), Nanjing (1), Guangzhou (1)	Swan Valley; Perth Observatory
Oct 23, 2025	09:30–14:00	3	Mainland China — Beijing (1), Nanjing (1), Guangzhou (1)	Woodman; Kings Park

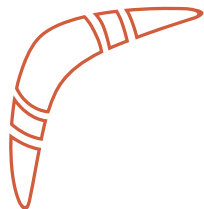
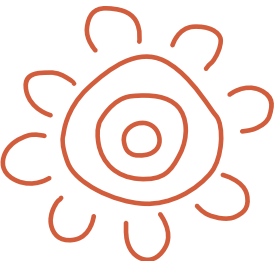
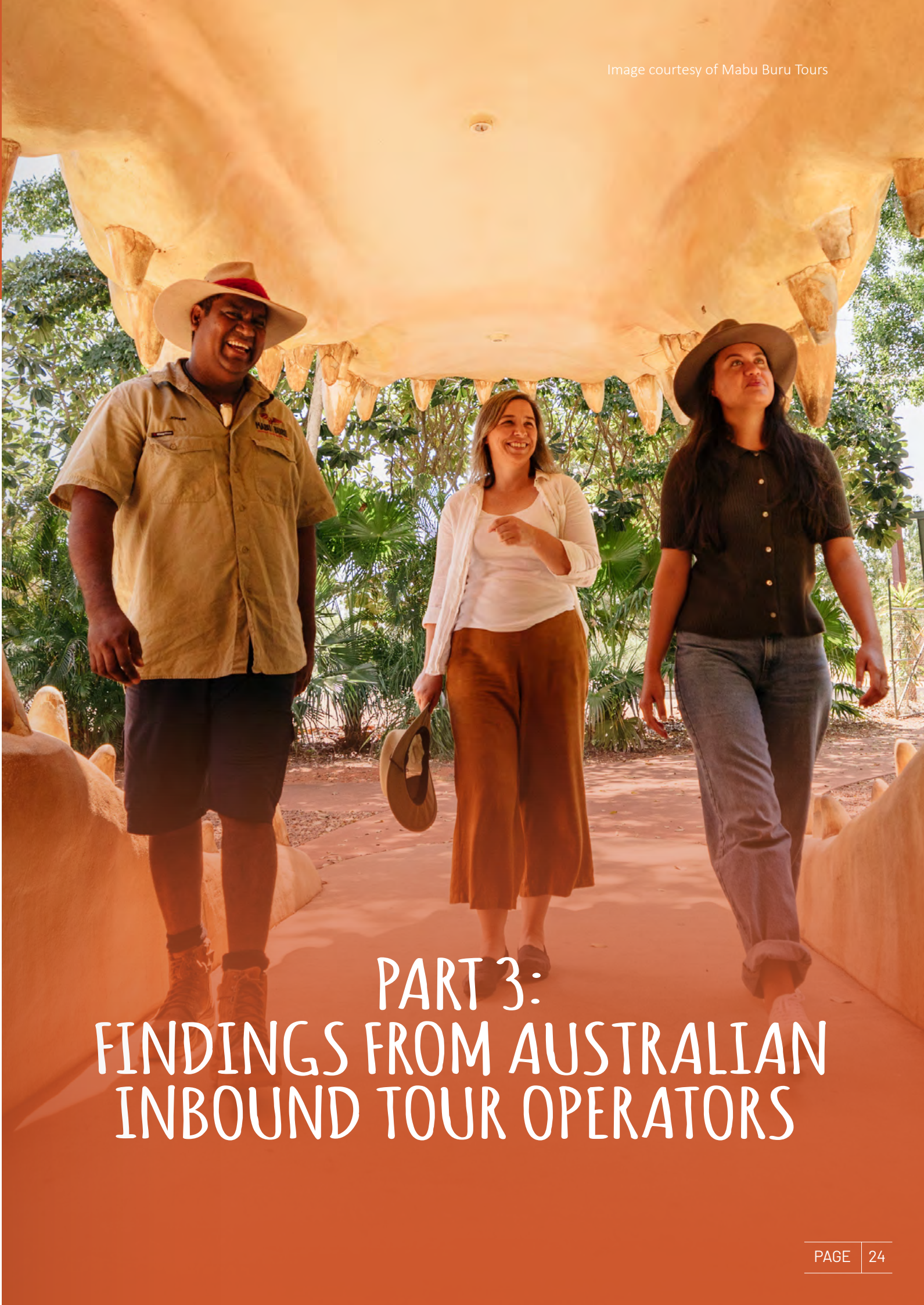


Image courtesy of Mabu Buru Tours



PART 3:
FINDINGS FROM AUSTRALIAN
INBOUND TOUR OPERATORS

3.1 Current Operations Targeting the Chinese Tourism Market

After the COVID-19 pandemic, the Chinese tourism market is recovering unevenly. Group tours remain slow to rebound due to limited flights and economic uncertainty, whereas free independent travel (FIT), high-end customised tours, business travel, self-driving trips, and study tours are increasingly dominant.

Operators report a clear trend towards diversification, with FIT and niche products now forming the mainstream. Per capita spending has risen, particularly for experiential, high-end, and customised offerings. In response, **ITOs are actively restructuring product portfolios, innovating experiences, and segmenting offerings to align with these long-term market transformations.**

3.2 Engagement with Indigenous Tourism Products



Indigenous elements are commonly integrated as ancillary experiences rather than standalone offerings. The most frequent inclusions are Welcome to Country and smoking ceremonies, Indigenous music and dance, cultural interpretation at sites, hands-on activities such as dot painting or handprint art, and introductions to native foods and plants. Experiences are largely observational, with interactive components being occasional and limited in depth.



Promotion of Indigenous tourism remains weak. ITOs generally include these elements as complements to mainstream itineraries rather than as featured products, particularly for the Chinese market, where awareness of Indigenous culture is low. Challenges include fragmented supplier networks, unstable partnerships, absence of product standardisation, and limited commercialisation, which collectively restrict the ability to offer immersive, high-quality experiences.

3.3 Knowledge and Perceptions of Indigenous Tourism

ITOs' understanding of Australian Indigenous tourism is predominantly on the ceremonial and performative aspects. Commonly recognised elements include Welcome to Country, smoking ceremonies, Dreamtime storytelling, boomerang demonstrations, dot painting, and bush tucker. The Northern Territory is often perceived by operators as the representative region offering deeper and more authentic experiences. However, most operators have limited familiarity with immersive activities such as traditional hunting, fishing, food preparation, or family/community visits.

Compared internationally, ITOs observe that New Zealand's Māori tourism and Native American experiences in the United States provide large-scale, highly interactive, and well-packaged offerings with strong government and industry support. Southeast Asia and African Indigenous tourism similarly emphasise hands-on, immersive experiences. In contrast, Australian offerings are largely narration- and ceremony-focused, with limited participatory depth, smaller scale, language barriers, and inconsistent professionalisation.

In contrast with immersive indigenous offerings from New Zealand, America, South East Asia and Africa, Australian offerings are largely narration- and ceremony-focused, with limited participatory depth, are smaller scale, have high language barriers, and inconsistent professionalisation.

Chinese tourists generally respond positively to Australian Indigenous tourism, especially interactive and visually engaging elements such as dot painting, handprint art, musical performances, and boomerang throwing. Welcome to Country and smoking ceremonies are widely appreciated and easily incorporated into itineraries. However, most experiences often remain superficial due to language limitations, lack of interactivity, and insufficient cultural depth. Family and study-tour segments show the strongest interest in immersive, educational content.

3.4 Barriers and Opportunities for Promoting Indigenous Tourism

3.4.1 Barriers

From the ITO perspective, barriers span both demand- and supply-side challenges. On the demand side, low awareness, cultural distance, language gaps, and insufficient interactivity hinder engagement. Many Chinese tourists rely heavily on guides for interpretation and have limited pre-trip knowledge of Indigenous culture. On the supply side, offerings are fragmented, under-standardised, and under-commercialised. Partnerships are often irregular and unstable, training and professional development are limited, and regional constraints restrict deeper experiences. These factors result in shallow experiences, operational instability, and limited market growth.

3.4.2 Opportunities and Recommendations

Promoting Indigenous tourism to the Chinese market requires a dual approach:

Demand-side strategies

- 1 Enhance awareness and cultural literacy through diversified promotion in China, including social media campaigns, short videos, and offline cultural events.
- 2 Provide bilingual or localised interpretation (e.g., audio guides, handbooks) to reduce language barriers and improve resonance.
- 3 Tailor immersive and interactive experiences to key segments such as families, study tours, and high-end customised travellers. Activities could include bushcraft, foraging, traditional cooking, handicrafts, and family/community visits.

4 Incorporate narrative-driven, context-rich storytelling to deepen cultural engagement and create memorable experiences.

5 Improve accessibility and logistics, ensuring integrated transport and hosting services that facilitate participation.

Supply-side strategies

Drive product innovation and standardisation, drawing lessons from international best practices. Develop systematised Indigenous product suites or representative hubs that offer participatory, story-rich experiences.

Provide professional development for Indigenous operators, guides, and tourism staff, including Chinese-language skills, customer experience management, and marketing capability.

Build centralised, authoritative product information platforms to streamline ITO access to offerings.

Establish feedback loops using Chinese visitor data to iteratively refine products, ensuring continuous improvement in experience quality and market alignment.

Establish industry-wide standards for pricing, service delivery, and safety to improve consistency and scalability.

Foster longer-term supplier partnerships and industry alliances to enable resource sharing, risk mitigation, and operational reliability.

Advocate for government support to enhance infrastructure, promote Indigenous cultural brands, and ensure sustainable development.

By addressing both demand- and supply-side factors, Australian Indigenous tourism can achieve greater visibility, authenticity, and commercial sustainability in the Chinese market. Interactive, immersive, and culturally resonant experiences are key to improving satisfaction, stimulating repeat visitation, and fostering positive word-of-mouth, while structured collaboration and professionalisation will strengthen the sector’s long-term viability.

Figure 2 summarizes the findings of the inbound tourism operators’ focus group interview findings.

Figure 2 Summary of ITO focus group interview findings

Dimension	Key Barriers	Opportunities/Recommendations
Demand-Side (Tourist/Market)	Low awareness of indigenous culture Cultural distance; experiences perceived as “exotic performance” Language barriers; limited Chinese interpretation Insufficient interactivity and immersion	Diversified China-facing promotion(social media, cultural events) Bilingual/localized interpretation and materials Tailored experiences for key segments (families, study tours, high-end FIT) Immersive, interactive activities (bushcraft, handicrafts, cooking, community visits) Narrative-driven, context-rich storytelling
Supply-Side (Products/ Operators)	Fragmented, irregular supplier networks Under-standardised and under-commercialised offerings Limited professional training and Chinese language capability	Product innovation; create systematized, story-rich Indigenous product suites Establish standards for pricing, service, safety, and quality Targeted professional development and Chinese-language training Foster long-term supplier partnerships and industry alliances
Overall Sector Opportunities	· Enhance interactivity, immersion, and cultural resonance · Improve satisfaction, word-of-mouth, repeat visitation · Strengthen professionalization, collaboration, and long-term sustainability	

Promoting indigenous tourism to the Chinese market will require both demand-side and supply-side strategies.

PART 4: FINDINGS FROM THE CHINESE KEY DISTRIBUTION PARTNERS (KDP)

4.1 Current Practices in the Australian Outbound Market

Chinese Key Distribution Partners (KDPs) maintain Australia as an important destination, but the way they operate has evolved. The prevailing business model is hybrid: wholesale remains the foundation, while many firms now combine wholesale with direct retail and customised tours. Wholesale packages continue to bundle flights and land services for retail agencies, but there is growing demand for small-group, themed, and high-spend products.

The product portfolio reflects this shift. Traditional East Coast itineraries (Sydney, Melbourne, Gold Coast, Cairns) still form the core, but post-pandemic recovery has seen rising interest in customised segments such as family, student, incentive, photography, and high-end groups. These segments are driving expansion into less-visited regions such as Western Australia, South Australia, and Tasmania.

In terms of strategic direction, operators report moving from scale-driven competition to value-driven competition. Increasingly, success depends on personalised, immersive, and professionalised offerings. Segmentation, co-innovation with destinations, and enhanced interpretation are viewed as critical levers for future competitiveness.

4.2 Experience with Indigenous Tourism Products

In Australia

Most Chinese tourists' exposure to Indigenous tourism remains superficial and focused on short, "show-and-tell" style activities. Performances and demonstrations, such as dance, didgeridoo, boomerang throwing, and Aboriginal-themed displays in city museums and botanic gardens, are frequently embedded in mainstream group itineraries. These products are low-cost, easily slotted into itineraries, and well-suited to first-time mass tourists.

A smaller segment of high-end or customised groups engages in deeper experiences. These include Indigenous-guided walks at Mossman Gorge, rock art interpretation and storytelling at Uluru and Kakadu, dot painting workshops, and craft markets in Sydney or cultural interpretation in the Kimberley. At the rarest and most resource-intensive end are immersive or co-creation experiences, such as long-duration cultural journeys or premium series like Uluru's "Back to Origins."

Image courtesy of WAITOC

In Other Countries

By contrast, KDPs operate a wide range of Indigenous and local cultural products abroad, characterised by concentrated venues, strong cultural symbols, and immersive participation. Examples include Māori cultural villages in New Zealand, reconciliation narratives in Canada, ritualised performances in Hawai'i and the South Pacific, tribal visits in Africa, community-based projects in South America, and Sámi tourism in Northern Europe. These international products are generally more standardised, recognisable, and immersive than Australia's fragmented offerings, providing benchmarks for comparison.

4.3 Knowledge and Perceptions of Indigenous Tourism

Chinese operators' knowledge of Australian Indigenous tourism is limited and fragmented. Most awareness comes via Tourism Australia training, familiarisation trips, and official promotional materials. Knowledge typically focuses on symbolic activities such as performances, dot painting, and didgeridoo demonstrations, with some exposure to Uluru and Kakadu. Awareness of deeper cultural practices—rituals, oral traditions, or indigenous ways of life—remains minimal.

A major limitation is the absence of a strong cultural symbol equivalent to the Māori haka in New Zealand or the hula in Hawai'i. This makes Indigenous Australian culture harder to promote internationally and contributes to a perception of fragmentation.

From a market perspective, general Chinese tourists often show little interest, perceiving Indigenous tourism as less engaging or less prestigious compared to iconic attractions like the Great Barrier Reef or Sydney Opera House. High-end tourists, however, express interest in immersive, authentic cultural content—though tour operators are sometimes hesitant to promote such products due to limited expertise and concerns about falling short of expectations.

Operationally, Australian Indigenous tourism is viewed as scattered, underdeveloped, and lacking an integrated cultural narrative. International comparisons reinforce this perception: while New Zealand offers centralised hubs and strong branding, and Canada embeds Indigenous tourism within reconciliation narratives, Australia is perceived as offering add-on, peripheral experiences.

4.4 Barriers to Promoting Indigenous Tourism to Chinese Tourists

Focus group participants identified a range of barriers that constrain market development:



Knowledge and Awareness Gaps: Most Chinese operators lack training and direct experience, while tourists have little awareness of Indigenous heritage. Some perceive the experiences as rustic and inconsistent with premium expectations.



Cultural and Interpretive Challenges: Operators are uncertain about cultural protocols, leading to risk aversion. Storytelling can be abstract or spiritual, which is difficult to translate cross-culturally. An absence of Mandarin-speaking Indigenous interpreters means explanations often remain superficial.



Product and Accessibility Limitations: Iconic sites such as Uluru and Kakadu are geographically remote, raising costs and logistical challenges. Offerings are fragmented and urban options are thin, limited mostly to brief shows. Many activities are passive rather than interactive, and outdoor settings present discomfort for group tourists.



Cost and Market Fit: Authentic Indigenous products often cost 20–30% more than conventional tours. Chinese tourists may see limited value, preferring visible prestige experiences. Agencies hesitate to promote products without subsidies or clear demand.



Promotion and Market Development: Indigenous tourism is very limited from major Chinese OTAs and social media platforms, lacks iconic symbols, and suffers from weak influencer content and photo-friendly moments. Fragmented promotion by states exacerbates low visibility.

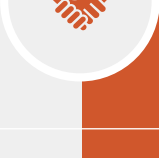
These barriers collectively reduce the appeal and feasibility of integrating Indigenous tourism into Chinese itineraries.

Authentic Indigenous products cost 20% - 30% more than conventional tours, leading Chinese visitors to choose 'visible prestige experiences'.



4.5 Opportunities and Strategic Suggestions

Participants offered a range of recommendations to strengthen Indigenous tourism for the Chinese market:

Create a clear taxonomy of Indigenous tourism offerings, develop nationally recognised icons, which could include establishing flagship hubs such as cultural villages. Promote through coordinated digital campaigns on Chinese platforms and reframe Indigenous culture as a premium, authentic luxury experience.	 Build Strong Symbols and IPs
Introduce modular, short interactive products in gateway cities; bundle Indigenous experiences with mainstream attractions; provide tiered agency incentives; and standardise offers with clear Mandarin support.	 Enhance Accessibility and Packaging
Train bilingual Indigenous interpreters, design hands-on workshops (dot painting, bush foods, instrument-making), and ensure comfort with shaded venues, signage, and seating. Develop tailored modules for families and students.	 Increase Immersion and Interaction
Produce Mandarin-language trade packs, integrate Indigenous experiences into OTAs, seed influencer campaigns across key social media platforms, and offer immersive previews via AR/VR.	 Boost Digital and Pre-Trip Engagement
Provide tiered subsidies, frame products as prestige and unique experiences, and encourage corporate sponsorship for cultural workshops.	 Address Cost and Market Fit
Establish a unified national strategy, integrate Indigenous storytelling into broader campaigns, run China-focused pilots (e.g., Lunar New Year festivals), and provide training for Chinese agents and guides.	 Strengthen Policy and Industry Support

These strategies are seen as essential to raising visibility, enhancing value perception, and broadening market demand.

4.6 Additional Insights and Emerging Themes

Two broader themes emerged. First, KDPs emphasised the importance of cultural translation—bridging Aboriginal narratives with Chinese cultural reference points to aid comprehension and resonance. Second, participants highlighted the potential for co-created experiences involving student exchanges, art collaborations, or long-duration cultural journeys. While niche, such initiatives could create prestige and strengthen cultural diplomacy.

Figure 3 below provides a summary of the KDP findings.

Figure 3 Summary of KDP focus group interview findings



PART 5: CONSUMER SURVEY FINDINGS

5.1 Perceptions of Aboriginal Tourism Experiences

Our analysis of survey responses highlights the rich and multifaceted ways that Aboriginal tourism in Australia is perceived by Chinese visitors. The findings confirm strong associations with culture, history, and nature, positioning Aboriginal tourism as both distinctive and transformative.

Cultural richness at the core

Terms like “Indigenous People” (274 mentions) and “Culture” (273 mentions) dominated responses, underscoring the central role of cultural identity. Mentions of “Tradition” (134) and “Primitive” (147) suggest that visitors view Aboriginal tourism as strongly tied to heritage and authenticity.

Immersive and unique experiences

Respondents frequently associated Aboriginal tourism with being both immersive and different. Words such as “Experience” (183 mentions) and “Unique” (84) highlight its distinct appeal, while “Pristine” and “Dreamlike” (68 mentions each) reflect its serene, almost transformative qualities.

Creative and spiritual expressions

Cultural activities were highly valued, with strong interest in art (111 mentions), dance (76), ceremony (64), and storytelling (55). These references reveal the importance of creative, performative, and spiritual traditions in shaping visitor perceptions.

Connection to land and environment

Nature remains a defining aspect of Aboriginal tourism. Respondents cited “Nature” (111 mentions), “Desert” (62), and iconic landmarks such as Uluru (36). Activities like hiking and exploration further emphasise the integration of Aboriginal tourism with Australia’s landscapes.

Positive emotional and social experiences

Survey participants consistently highlighted the warmth and hospitality of these experiences. Words like “Enthusiastic” (202 mentions), “Happy” (73), and frequent references to friendliness illustrate the strong emotional connections visitors feel.

Lifestyle, food, and daily practices

Beyond performances and landscapes, visitors expressed curiosity about everyday Indigenous life. Mentions of “Life” (93 mentions) and “Gourmet Food” (88) show a clear interest in lifestyle integration and culinary traditions as part of the cultural experience.

Historical and spiritual resonance

Aboriginal tourism is also strongly associated with history and spirituality. Terms such as “Ancient” (94 mentions), “Heritage” (44), and “Rock Art” (30) reflect the depth of time and sense of continuity that these experiences convey.

The findings reinforce Aboriginal tourism as a holistic and immersive offering that combines cultural richness, emotional warmth, pristine natural environments, and profound historical and spiritual resonance. Together, these elements make Aboriginal tourism one of Australia’s most distinctive avenues for celebrating and sharing Indigenous heritage. Overall, two distinct thematic clusters that shape perceptions of Aboriginal tourism experiences in Australia are identified (Figure 4)

Many people associate Aboriginal tourism with deep cultural and historical meaning. Words like Indigenous, Aboriginal, Ancient, and Tradition show that visitors value the heritage and long history of Australia's First Peoples. Activities such as art, storytelling, and cultural performances are seen as chances for genuine cultural engagement. These experiences are often linked with natural settings, giving visitors both a sense of history and a calm, authentic backdrop.

The second theme highlights Aboriginal tourism as a way to experience culture in close connection with Australia's landscapes. Visitors mentioned tribes, ceremonies, and other distinctive practices, while also pointing to the desert, jungle, and pristine environments where these activities take place. Words like adventure and exploration suggest that people see Aboriginal tourism as exciting and different, blending cultural learning with outdoor discovery.

Figure 4 Word clouds of topics of consumer perceptions of indigenous tourism experience in Australia



Our analysis identified the main factors that influence whether people take part in Aboriginal tourism in Australia. The results highlight the importance of knowledge, demographics, media exposure, and personal values in shaping interest and participation.

Familiarity with Aboriginal tourism is the single strongest predictor of participation. People who know more about Aboriginal culture and tourism offerings are much more likely to seek out these experiences. General knowledge about Australia also plays an important role in sparking interest.

Age and income stood out as key factors. Older travellers and those with higher incomes are more likely to engage in Aboriginal tourism, reflecting the influence of life stage and financial capacity on cultural travel choices.

How people learn about Aboriginal tourism is also important. Respondents who encountered Tourism Australia promotions on television or searched online for travel information were more likely to participate. This highlights the continued importance of both traditional and digital media in creating awareness and driving action.

Cultural values such as family connection and enjoyment of life were also linked to interest in Aboriginal tourism. This suggests that travellers often seek experiences that align with their personal values and enrich their time with loved ones.

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5.3 Drivers of Repeat Aboriginal Tourism Experiences

Our analysis looked at what makes travellers more likely to take part in Aboriginal tourism experiences more than once. Several clear patterns emerged:

Prior Knowledge

People with stronger knowledge of Aboriginal culture, Aboriginal tourism, and Australia in general are far more likely to return for a second or third experience. This shows that building understanding and awareness is central to encouraging repeat visitation.

Age and income play a role. Younger and middle-aged travellers, along with those with higher incomes, are more inclined to return. These groups tend to have both the motivation and resources to engage more deeply.

Demographics

Media Shapes Repeat Engagement

Traditional media, especially television, stands out as an important source of influence. Repeat visitors were more likely to have been exposed to Aboriginal tourism through TV promotions, highlighting the continued value of broad media campaigns.

Travel Motivations and Emotions

People who already intend to travel, who find Australia a pleasant and welcoming destination, and who feel confident exploring are more likely to seek Aboriginal tourism experiences again.

Personal Values Drive Deeper Connections

Values such as enjoyment, personal growth, and life fulfilment are strongly linked to repeat participation. Travellers who see cultural tourism as a way to enrich their lives are the ones most likely to return.



5.4
Demographic
profiling

Age

Analysis showed that Aboriginal tourism participation varies significantly by age. Engagement was highest among 26–35 and 36–45-year-olds, with 433 and 468 participants respectively, suggesting middle-aged adults are the most active visitors. Younger adults (18–25) showed moderate interest, while participation sharply declined in those 65 and older, with only 5 reporting an experience. These differences likely reflect factors such as financial resources, independence, mobility, and awareness. The results suggest that tourism providers should develop age-specific marketing and tailored experiences to attract underrepresented groups, especially older travellers (Figure 5)

Figure 5 Aboriginal Tourism Experience by Age Group



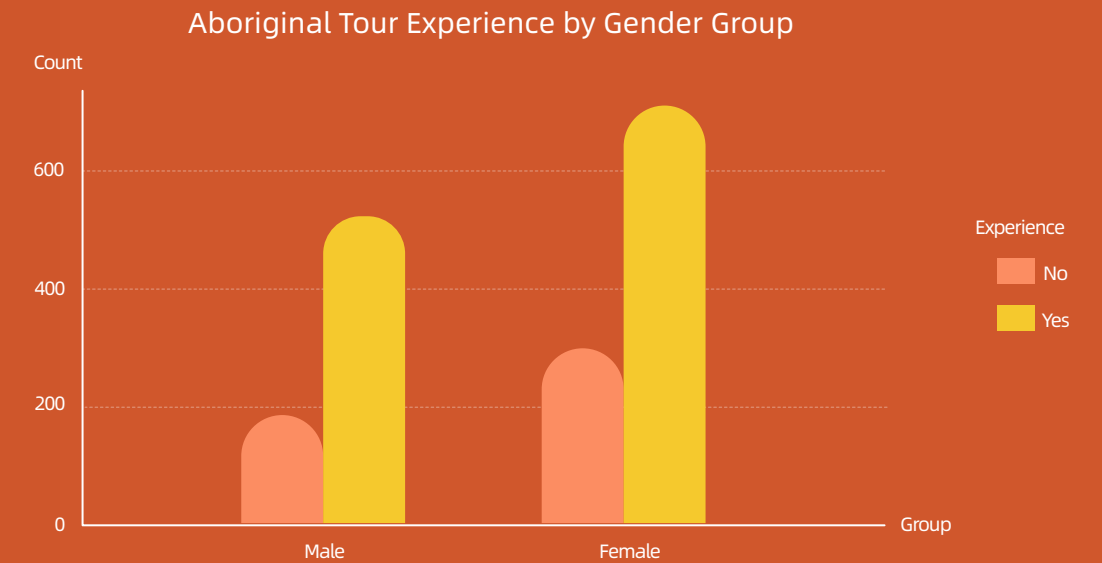
Engagement was highest among 26–35 and 36–45-year-olds, suggesting middle-aged adults are the most engaged.



Gender

Analysis showed no significant difference in Aboriginal tourism participation between genders. While slightly more females (690) than males (520) reported having such experiences, the difference was not statistically meaningful. This indicates that men and women engage in Aboriginal tourism at similar rates. As gender does not appear to strongly influence participation, marketing or policy strategies do not need to focus on gender-specific approaches. Efforts would likely be more effective if directed toward factors such as age, prior travel experience, or cultural interest, which better explain engagement patterns (Figure 6)

Figure 6 Aboriginal Tourism Experience by Gender



Education

Although statistically, there was not significant association between respondents' education levels and Aboriginal tourism participation, more university-educated participants (undergraduate and postgraduate) reported participation experiences (Figure 7). Aboriginal tourism attracts people across all educational backgrounds, particularly those with undergraduate and postgraduate degree. As a result, marketing and development strategies should attend this pattern. In addition, efforts should focus on factors that better influence participation, such as age, cultural interest, prior travel experience, or awareness of destinations, which are more likely to drive engagement."

Figure 7 Aboriginal Tourism Experience by Education Level

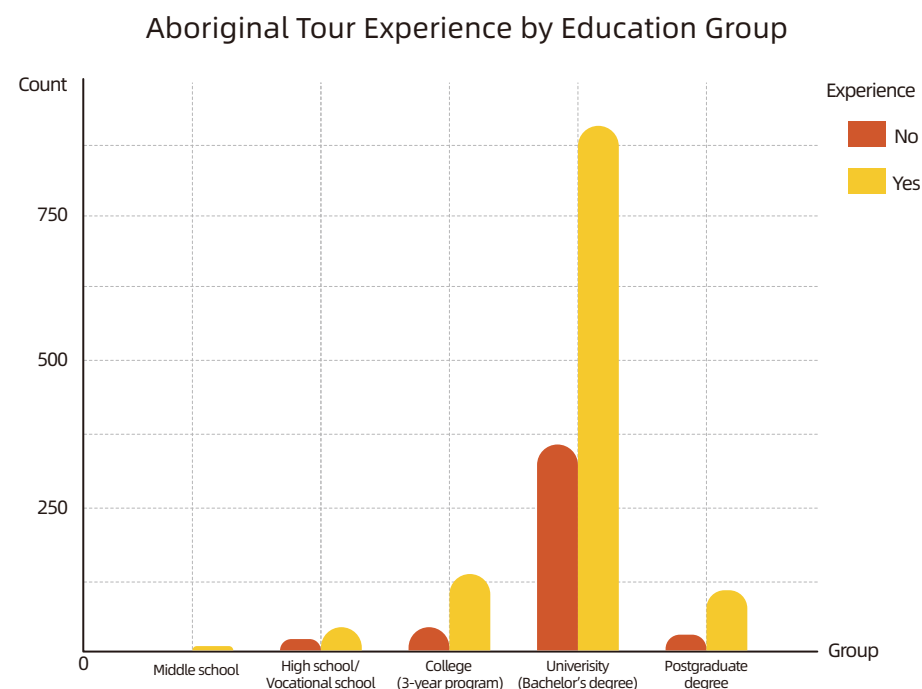
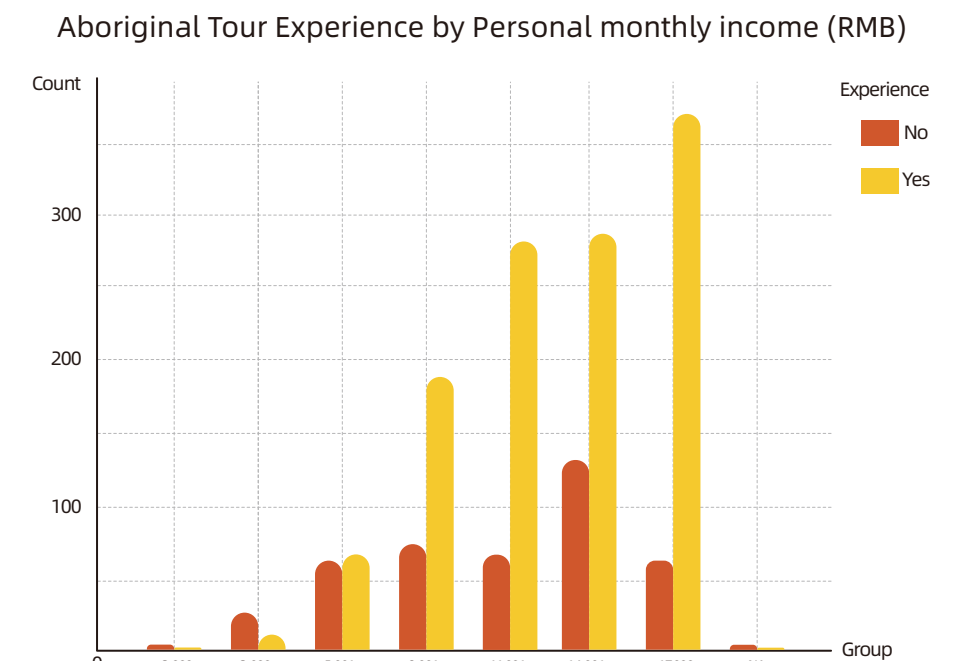


Image courtesy of Waringarri Arts

Income

Analysis revealed a strong link between income and Aboriginal tourism participation. Participation increased with higher income, with the highest engagement among those earning over 17,000 RMB/month (376 participants). In contrast, respondents earning below 5,000 RMB showed low participation, indicating financial or access barriers. This suggests that higher income supports greater involvement in Aboriginal tourism, likely due to more travel opportunities and discretionary spending. Marketing and product design could focus on middle- and high-income travellers while considering subsidies or tiered experiences to make Aboriginal tourism more accessible to lower-income groups (Figure 8).

Figure 8 Aboriginal Tourism Experience by Monthly Personal Income (RMB)



Marital status

Analysis showed a significant link between marital status and Aboriginal tourism participation (Figure 9). Married respondents were much more likely to engage in Aboriginal tourism (1,057 participants) than single respondents (153 participants). The “Other” category had no participation, though the sample was very small. This suggests married individuals may have greater opportunity, shared planning, or motivation for cultural travel. Tourism operators could focus on creating group- or family-friendly experiences for this segment, while also developing offerings that appeal to solo or independent travellers, ensuring Aboriginal tourism is accessible and attractive across different life situations.

Figure 9 Aboriginal Tourism Experience by Marital Status

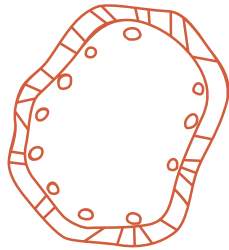
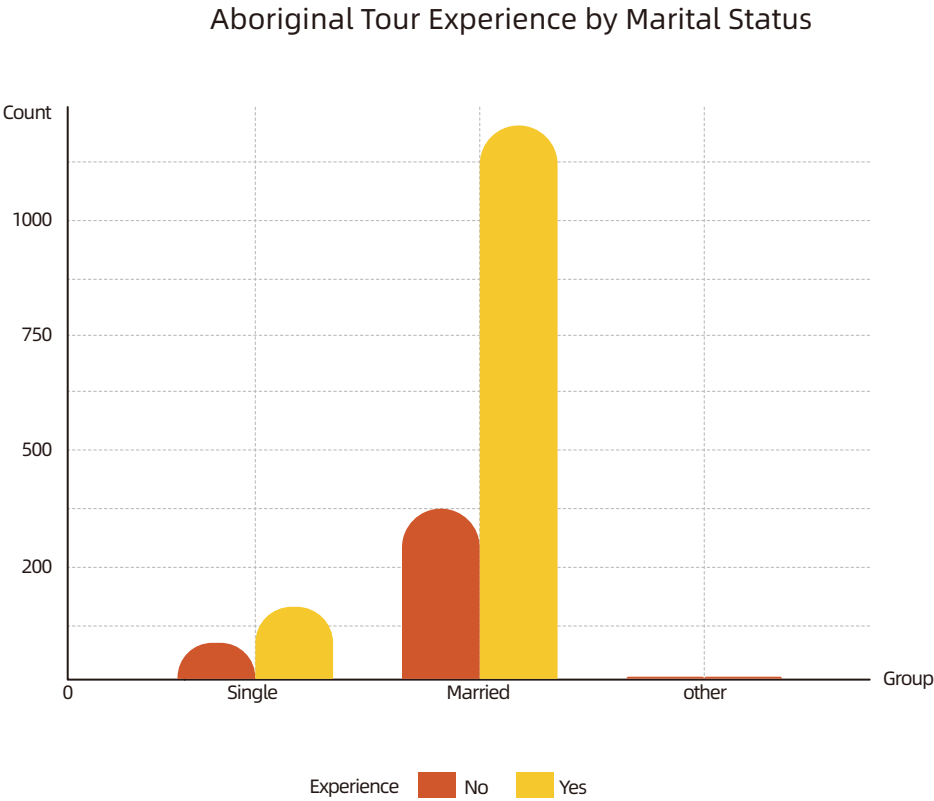


Image courtesy of WAITOC

PART 6: FINDINGS OF PARTICIPANT OBSERVATIONS



Image courtesy of WAITOC

Participants affirmed the centrality of culture as a drawcard for Chinese tourists, but noted the absence of accessible cultural experiences for Chinese tourists in the Australian tourism landscape. Participants shared a saying that is reportedly commonly known amongst industry in China. This can be translated as “To experience culture, go to Europe; to enjoy scenery, come to Australia.” Yet this is in contrast with the participants confirming that they viewed Aboriginal experiences as having the potential to be a key differentiator.

Success in China depends on:

- (1) National-level orchestration and branding;
- (2) Low-friction, lightweight embedding of cultural touchpoints into existing itineraries;
- (3) Two-way cultural exchange to “break the ice” and reduce psychological distance.

The common saying amongst Chinese KDPs “To experience culture, go to Europe; to enjoy scenery, come to Australia” is in contrast with KDPs also observing that Aboriginal experiences have the potential to be a key product differentiator.

In the near term, policy subsidies plus product innovation are needed to resolve the high-cost/low-acceptance dilemma. Government should lead cultural outreach and market education, improving Chinese visitors’ awareness, accessibility, and value perception of Aboriginal experiences.

The famil trip confirmed earlier survey and focus group interview themes—low awareness, language barriers, fragmented supply, higher costs—and added two observations:

- Modernised staging with weaker place anchoring;
- Overly instructional delivery (long and complicated stories, low interactivity).

6.1 Overall experience

Sincerity & pacing

Suppliers’ authenticity built trust; modules like Steven’s walk tour showed clear flow and comfortable rhythm.

Scene-story fit

Modern/urban settings weakened Aboriginal tourism immersion and place anchoring.

Delivery style

Over-instructional storytelling (long/complex), low interactivity, limited translation support.

Operations

Loose timekeeping and basics (mosquitoes/wet grass, missing cutlery/mats, repeated cold meals).

6.2 Most memorable moments

Positive anchors

Flag-planting and family story on coastal walk tour (identity/belonging); opening-night dance (emotional lift, standout child performer); foodways broadened sensory learning.

Awkward moments

Many experiences felt classroom-like; language barriers obscured links between astronomy and Aboriginal cosmology; minimal interaction; lack of hot food.

Positioning & price

Current products are largely positioned for Western markets. Rebuild the price–value proposition through modular packaging and value-adding enhancements that do not increase price. For example, incorporate elements that are more relatable for Chinese consumers — such as including content on colonial architectural heritage in a walking tour to highlight the clash of worlds during Australia’s colonisation. Other opportunities include identifying the closest Chinese herbal name for a bush-tucker ingredient, or drawing parallels between traditional Aboriginal medicinal ingredients and their closest counterparts in traditional Chinese medicine.

**Operations & understanding**

Internalise Chinese group norms—schedule discipline, pre-briefs, translation/headsets, concise modules.

Perception shifts post-famil trip

Perception shifts post-famil trip: Higher confidence in supplier reliability (WAITOC curation); clearer status of Aboriginal culture in Australia but low national-level exposure in China; Indigenous foodways seen as contemporary and safe, not “primitive.”



Image courtesy of WAITOC



PART 7: GAP ANALYSIS (IN FULL)

The gap analysis highlights the structural, cultural, and market-facing challenges that currently limit the growth of Aboriginal tourism in the Chinese market. It shows that while Chinese travellers express strong interest in authentic Indigenous experiences, key gaps remain across awareness, product design, interpretation, distribution, and national coordination. These gaps naturally cluster into four themes that reflect the core dynamics of the China–Australia tourism system:

- (1) Demand-Side Activation
- (2) Supply-Side Development
- (3) National Branding and Cultural Positioning
- (4) System-Level Enablers

These themes are not arbitrary categories; they emerge directly from the evidence and represent the distinct levers required to stimulate demand in China, improve delivery capacity in Australia, build a unified Aboriginal tourism identity, and ensure long-term policy and governance support. Together, they provide a structured framework for addressing the barriers identified and guiding targeted, system-wide improvement.

Theme 1

Demand-Side Activation Gaps
(China-Facing Awareness & Market Development)

7.1.1 Low awareness and cultural literacy among Chinese travellers

- Chinese consumers have limited understanding of Aboriginal history, cultural values, artistic traditions, and contemporary identity.
- Awareness is confined to a few surface symbols (dot painting, didgeridoo, smoking ceremony).
- Lack of cultural resonance inhibits curiosity and intent to participate.

- Aboriginal tourism rarely appears in search results on Ctrip, Mafengwo, Fliggy, or Qunar.
- Listings lack photos, reviews, videos, and Mandarin storytelling.
- Without digital “proof,” customers perceive products as risky or unclear.

7.1.2 Minimal visibility on Chinese digital platforms and OTAs

7.1.3 Limited pre-trip information and cultural “touch-points” in China

- Chinese travellers prefer to understand experiences in advance; uncertainty reduces conversion.
- Few opportunities exist for online previews, physical displays, workshops, or educational content in China.
- Absence of this “priming” creates psychological distance.

- No unified national Aboriginal tourism strategy targeting China.
- Fragmented state-led promotions lead to inconsistent messaging.
- No long-term investment in China-market cultural literacy building (across media, schools, trade partners).

7.1.4 Lack of China-focused policy support for demand stimulation

Theme 2

Supply-Side Development Gaps
(Australian Delivery System: Indigenous Operators + ITOs)

7.2.1 Low China-readiness among Aboriginal tourism operators

- Limited understanding of Chinese traveller behaviour, preferences, and expectations.
- Operators are unsure which experiences resonate with Chinese visitors.
- Pacing, hospitality norms, photography habits, and group behaviour are unfamiliar.

7.2.2 Major interpretation and language barriers on-site

- Few Mandarin-speaking Indigenous guides.
- Chinese tour leaders often lack deep knowledge of Aboriginal culture.
- Interpretation collapses into superficial explanations, losing meaning and diminishing experience quality.

7.2.3 Insufficient interactivity and experiential design

- Many offerings are observation-heavy rather than hands-on.
- Chinese travellers strongly prefer active participation (crafts, food tasting, guided storytelling).
- Lack of modular, photo-friendly experiences limits commercial appeal.

7.2.4 Limited accessibility for Chinese market segments

- Products are often located far from major gateways.
- Few short, affordable, first-entry products exist for time-tight visitors.
- Need for simpler logistics, predictable durations, and easy-to-book modules.

7.2.5 Weak professionalisation and inconsistency across operators

- Variation in service delivery, pricing, safety, cultural protocols.
- Limited business capability (marketing, distribution, digital tools).
- ITOs find it difficult to rely on Aboriginal operators due to inconsistent quality or availability.

7.2.6 Fragmented relationships between Indigenous Operators, ITOs, and KDPs

- No systematic partnership model or shared commercial frameworks.
- Many operators lack the networks, pricing systems, or communication structures needed for repeat business.
- The supply chain is disconnected: KDPs cannot sell what ITOs struggle to deliver, and operators receive limited market feedback.



Image courtesy of Koomal Dreaming

7.3.1 No recognisable Aboriginal cultural “symbol” for international markets

- Unlike the Māori haka or Native American powwow, Australia lacks a unified cultural signature.
- This absence reduces memorability and weakens national tourism identity.
- KDPs repeatedly expressed uncertainty about what Aboriginal culture represents in a modern context.

7.3.2 Lack of flagship cultural centres or hubs

- No major urban Aboriginal cultural centres comparable to those in NZ, Canada, or the US.
- Experiences are dispersed and inconsistent, making it hard for Chinese visitors to access reliable anchor experiences.

7.3.3 Fragmented, state-by-state branding

- Each state promotes Aboriginal tourism differently.
- Messaging varies, sometimes contradicts, and creates confusion for Chinese buyers.
- Operators and KDPs lack unified brand assets or storytelling frameworks.

7.4.1 Lack of unified national governance for Aboriginal tourism development

- No coordinated federal, state, and industry partnership focused on Indigenous tourism for international markets.
- Roles of peak indigenous industry bodies across the country, Tourism Australia, ATEC, ATIC, and state agencies are not fully integrated.
- Duplication, gaps, and underinvestment impede scale.



7.4.2 Insufficient long-term funding pathways

- Short-term project funding limits product development, training, and continuity.
- No dedicated ongoing fund for Aboriginal tourism capability building or China-market development.



7.4.3 Underdeveloped infrastructure and experience-support systems

- Limited interpretive infrastructure, signage, digital platforms, and booking systems.
- Lack of regional hubs and transport linkages inhibits accessibility.



7.4.4 Weak mechanisms for feedback, evaluation, and continuous improvement

- No national monitoring system tracking Chinese perceptions, satisfaction, or participation.
- Operators struggle to access market intelligence.
- No formal channels for KDP, ITO, or customer feedback to reach operators consistently.



7.4.5 Limited pathways for repeat visitation and lifelong engagement

- Few structured multi-visit “ladders” (entry-level → deeper → immersive journeys).



PART 8: RECOMMENDATIONS (IN FULL)

Image courtesy of Wula Gura Nyinda



The findings from inbound tour operators, Chinese distribution partners, and consumer surveys all point to a central conclusion: there is strong but underdeveloped potential for Aboriginal tourism in the Chinese market. To unlock this potential, industry stakeholders must move beyond treating Aboriginal experiences as peripheral “add-ons” and instead build a cohesive, immersive, and culturally rich product suite that resonates with Chinese travellers. Below are practical recommendations for government, industry, and Indigenous operators to consider.

To provide greater clarity and strategic coherence, the recommendations have been organised into four thematic areas:



This structure reflects the interconnected nature of the Aboriginal tourism ecosystem and the specific roles played by different actors across the China–Australia supply chain. By grouping the recommendations into these themes, the report distinguishes between actions that stimulate market demand, those that enhance experience delivery, those that elevate national identity, and those that build the structural foundations needed for scale. This thematic approach highlights the need for a balanced and coordinated strategy that addresses both immediate market-facing challenges and the broader systemic conditions required for success.

A one-page summary of recommendations by theme can be found below.

Table 3 One page summary of recommendations by theme

		
Theme	Purpose	Numbered Recommendations
Theme 1 — Demand-Side Activation (China-Facing Awareness & Market Development)	Raise awareness, build cultural literacy, and stimulate demand for Aboriginal tourism in China.	1.1 Build Awareness and Cultural Literacy in China 1.2 Leverage Media and Pre-Trip Engagement 1.3 Secure Government and Policy Support for China-Facing Promotion
Theme 2 — Supply-Side Development (Australian Delivery System: Indigenous Operators + ITOs)	Strengthen experience delivery, China-readiness, product innovation, interpretation, and packaging within Australia.	2.1 China-readiness and cultural literacy among Indigenous operators 2.2 Enhance Interpretation and Reduce Language Barriers 2.3 Strengthen Immersive and Interactive Offerings 2.4 Improve Market Accessibility and Packaging 2.5 Professionalise and Standardise the Supply Side
Theme 3 — National Branding & Cultural Positioning	Establish a unified Aboriginal cultural brand and nationally recognisable tourism identity.	3.1 Develop Strong Cultural Symbols and National Branding
Theme 4 — Enablers & System Architecture (Governance, Policy, Coordination)	Build long-term policy, governance, funding, and cross-agency coordination frameworks.	4.1 Secure Government and Policy Support (Domestic System-Level) 4.2 Foster Repeat Visitation Through Deeper Connections

Recommendation text in-full

Theme
1

Demand-Side Activation (China-Facing Awareness & Market Development)

This theme focuses on creating cultural literacy, visibility, and demand within China. Chinese travellers and Chinese trade partners require clearer narratives, stronger awareness, and Mandarin-language tools before they will confidently purchase Aboriginal tourism experiences.



8.1.1 Build Awareness and Cultural Literacy in China

Why it matters

Awareness of Aboriginal culture among Chinese travellers is low, and most Chinese distribution partners only know of a handful of symbolic activities such as dot painting, didgeridoo performances, or smoking ceremonies. Without a basic level of knowledge, travellers are less likely to seek out these experiences, and operators are less confident about promoting them.

Targeted Mandarin campaigns

Develop Mandarin-language promotional content that introduces Aboriginal heritage, stories, and everyday practices in engaging and visually appealing ways. Short videos, social media campaigns on platforms like WeChat, Weibo, Douyin, and Xiaohongshu, and collaboration with Chinese influencers should form the backbone of this effort.

Cultural storytelling bridges

To make narratives more relatable, Aboriginal stories could be presented alongside Chinese cultural values such as family, respect for ancestors, and harmony with nature. This cultural translation will help reduce the sense of distance and increase resonance.

Offline cultural touchpoints

Showcase core Indigenous products at major official moments (e.g., state visits). Partner with Chinese cultural centres, universities, and travel expos to stage Aboriginal art workshops, performances, or exhibitions. Run themed training/roadshows in China and promote two-way exchanges (e.g., Aboriginal operators' visits to Chinese ethnic villages) to deepen mutual understanding. These can act as “pre-trip tast-ers” and build credibility.

What to do

8.1.2 Leverage Media and Pre-Trip Engagement

Why it matters

Survey results show that media exposure—particularly television and digital channels—significantly increases both first-time and repeat participation in Aboriginal tourism. Yet Indigenous tourism is almost invisible on Chinese OTAs and digital platforms.

What to do

Boost digital presence

Ensure Aboriginal tourism products are listed on major Chinese OTAs with high-quality visuals, Mandarin descriptions, and customer reviews.

Influencer & KOL campaigns

Partner with Chinese travel bloggers and social media influencers to showcase Aboriginal experiences through visually appealing and story-driven content.

Immersive previews

Offer AR/VR previews of activities (e.g., a virtual walk through Uluru rock art sites or a Dream-time storytelling session) to spark curiosity and reduce uncertainty before booking.

Traditional media marketing

Continue using traditional media such as TV promotions, which remain highly influential in reaching Chinese households, especially those outside tier-one cities.

8.1.3 Secure Government and Policy Support for China-Facing Promotion

Why it matters

International benchmarks show that Indigenous tourism thrives where there is strong policy and industry backing. New Zealand, Canada, and the US have successfully scaled Indigenous products through coordinated national strategies, infrastructure investment, and cultural branding.

What to do

China-focused national strategy

Elevate Aboriginal culture to a national tourism IP with structured China-market exposure. Align federal, state, and regional efforts to present a cohesive narrative and avoid fragmented promotion.

01



Digital & interpretation infrastructure (China-facing)

Invest in digital interpretation platforms, Mandarin-language marketing tools, visitor information systems, and other China-market enablers to make Aboriginal experiences more accessible and appealing to Chinese visitors.

02



China-market incentives

Offer subsidies, pilot programs, or co-marketing funds to encourage operators to trial Aboriginal tourism products for Chinese travellers.

03



Sustainable China-engagement

Ensure China-focused policies support cultural integrity, community ownership, and environmental stewardship, safeguarding long-term benefits for Indigenous communities in China-facing promotion.

04



Image courtesy of Southern Cross Cultural Walk

Supply-Side Development (Australian Delivery System: Indigenous Operators + ITOs)

This theme strengthens the capability of the people and organisations who deliver Aboriginal tourism on the ground in Australia: Indigenous tourism operators and inbound tour operators. The focus is on interpretation, experience design, professionalism, product packaging, and China-readiness.

8.2.1 China-readiness and cultural literacy among Indigenous operators in Australia

Why it matters

Many Indigenous operators are unsure which products appeal to the Chinese market or how to position them. There is limited understanding of Chinese travelers' consumption needs and psychology, as well as behavioural preferences and on-trip habits (e.g., information sources, group dynamics, photo moments, meal preference). Closing this knowledge gap is essential for product-market fit and effective distribution.

What to do

Cultural literacy for operators

Provide concise primers on elements of Chinese traditional culture (e.g., traditional medicine and wellness, intangible cultural heritage) that often motivate travel. Link Aboriginal values and practices to these interests, for example, moving beyond a singular focus on “bush tucker” toward spiritual appeal and lifestyle-oriented touchpoints (e.g., bush-food tasting framed through wellness and seasonal eating).

China-ready service & pacing

Prepare Mandarin service, align tour pacing with Chinese group norms. Offer short “China readiness” training for Aboriginal guides covering dietary preferences and itinerary/content cues that perform well on Chinese platforms.



Experience exchange in China

Encourage operator visits to Chinese minority cultural sites, such as Miao villages in Guizhou or Azheke Village (Yunnan), to observe product commercialisation, interpretive storytelling, and craft demonstrations. Use these insights to enhance the commercial readiness of Indigenous products and design differentiated experiences for Chinese visitors.

Co-designed modular experiences

Work with Chinese key distribution partners and ITOs to package modular add-ons (Mandarin briefing cards, hands-on craft moments, photo stops, tea or tasting breaks) that increase perceived value without raising the base price.

8.2.2 Enhance Interpretation and Reduce Language Barriers

Image courtesy of WAITOC

Why it matters

Both ITOs and Chinese KDPs highlighted language as a key barrier. Without Mandarin-speaking Indigenous guides or bilingual interpretation tools, the depth and meaning of Aboriginal experiences are often lost, resulting in shallow encounters.

What to do

Mandarin guide training

Invest in professional development programs for Indigenous operators and guides to acquire Mandarin language skills. Alternatively, partner with Chinese-speaking tour leaders and provide them with in-depth cultural training.

Bilingual interpretation resources

Produce handbooks/pre-briefs, digital apps, and audio guides in Mandarin that explain cultural practices, sites, and stories in a structured, context-rich way.

Technology-enabled interpretation

Use QR codes, AR/VR previews, or AI-based translation tools to offer interactive interpretation that supports both guides and visitors.

Structured storytelling

extract cross-cultural anchors and a tight core storyline, using “scene first, then story,” short modules, and strong interaction.

8.2.3 Strengthen Immersive and Interactive Offerings

Why it matters

Chinese travellers respond positively to hands-on, creative, and participatory activities. Survey data confirms high interest in art, storytelling, food, and lifestyle integration. At the same time, international competitors such as New Zealand and Canada already offer large-scale, highly immersive Indigenous experiences that Australia risks being unfavourably compared with.

What to do



Lightweight cultural embedding

Weave scenographic cultural elements into existing routes (hotel décor, themed dining, dot painting), reduce reliance on heavy, weather-sensitive projects (e.g., professional stargazing).

Modular workshops

Develop scalable products such as dot painting classes, bush food tastings, or instrument-making sessions that can be easily slotted into itineraries in gateway cities as well as regional hubs.



Family & student product design

Tailor interactive packages such as cultural scavenger hunts, cooking with Indigenous families, or art collaborations. These resonate particularly with the family, study-tour, and youth segments identified as high-potential.

Comfort + authenticity balance

Ensure immersive experiences provide certain comforts the Chinese market are accustomed to while maintaining cultural integrity. These may include ideas such as shaded seating, accessible facilities, food delivery preferences, and photo-friendly elements. This balance will help broaden appeal without diluting authenticity.



8.2.4 Improve Market Accessibility and Packaging

Why it matters

Accessibility challenges—including long distances, higher costs, and fragmented availability—discourage both operators and travellers from engaging deeply. Aboriginal tourism products are often viewed as too remote, too expensive, or too complex to package.

What to do

01

Urban entry-point products

Create short, interactive Aboriginal experiences in gateway cities for first-time visitors who cannot access remote areas. These should be modular, affordable, and easily added to classic itineraries.

02

Bundled itineraries

Pair Aboriginal experiences with mainstream attractions such as the Great Barrier Reef or Sydney Opera House. For example, offer a cultural welcome before a reef trip or a dot painting workshop alongside a city sightseeing tour.

03

Tiered pricing models

Design product suites at different price points, from entry-level encounters to premium immersive stays, making Indigenous tourism accessible across income segments.

04

Simplified logistics

Work with transport providers and ITOs to integrate Aboriginal experiences seamlessly into itineraries, with reliable schedules, transfers, and booking systems.

8.2.5 Professionalise and Standardise the Supply Side

Why it matters

Fragmentation, inconsistent service quality, and lack of professionalisation were common concerns raised by both Australian and Chinese partners. Without industry standards, Indigenous operators risk losing credibility and repeat business.

What to do

National standards

1

Establish clear benchmarks for pricing, service delivery, safety, and cultural protocols. These standards should be co-created with Indigenous operators to ensure cultural appropriateness.



Capacity building

2

Provide training in customer service, experience design, digital marketing, and Chinese visitor preferences. Indigenous operators should also have access to upskilling in business management.



Long-term partnerships

3

Encourage long-term agreements between ITOs, KDPs, and Indigenous suppliers. Collaborative frameworks reduce risk, ensure stable supply, and enable co-investment in product development.



Centralised product platforms

4

Build a national digital database where ITOs and KDPs can easily access reliable information about available Aboriginal tourism products, including booking details, pricing, and quality assurance indicators.



Theme
3

National Branding & Cultural Positioning

This theme focuses on building a unified Aboriginal tourism identity for international audiences. Australia currently lacks recognisable Aboriginal cultural symbols or flagship experiences comparable to the Māori haka or Hawaiian hula.

8.3.1 Develop Strong Cultural Symbols and National Branding

Why it matters

Chinese distribution partners repeatedly pointed out that Australian Aboriginal culture lacks a globally recognisable “flagship symbol” equivalent to the Māori haka or Hawaiian hula. Without such icons, it is harder to create a unified brand identity.

What to do

Flagship symbols & signatures

Under the leadership of Indigenous communities, develop nationally recognised symbols or experiences that can serve as the anchor of international promotion.

National cultural hubs

Create centralised, high-profile Aboriginal cultural centres or villages in both major gateways (e.g., Sydney, Melbourne, Brisbane, Perth) and iconic Indigenous regions (e.g., Western Australia, Northern Territory). These hubs should offer multiple immersive modules under one roof, providing accessible entry points for visitors. Prefer restoration/interpretation of authentic historical settings over green-field replicas, and differentiate clearly from Maori/South Pacific villages.

Premium cultural positioning

Position Aboriginal tourism not just as cultural “add-ons” but as luxury, authentic, and transformative experiences. This will appeal to the high-end Chinese market, which values prestige and unique enrichment.

This theme captures the broader enabling environment: national coordination, long-term policy settings, investment, cross-industry partnerships, and systems that sustain long-term growth across both supply and demand.

8.4.1 Secure Government and Policy Support

Why it matters

International benchmarks show that Indigenous tourism thrives where there is strong policy and industry backing. New Zealand, Canada, and the US have successfully scaled Indigenous products through coordinated national strategies, infrastructure investment, and cultural branding.

National Indigenous tourism strategy (domestic)

Elevate Aboriginal culture to a national tourism IP through coordinated federal, state, and regional cooperation. This strategy should unify messaging, strengthen cross-agency alignment, and avoid fragmented or inconsistent promotion across Australia.

Infrastructure investment

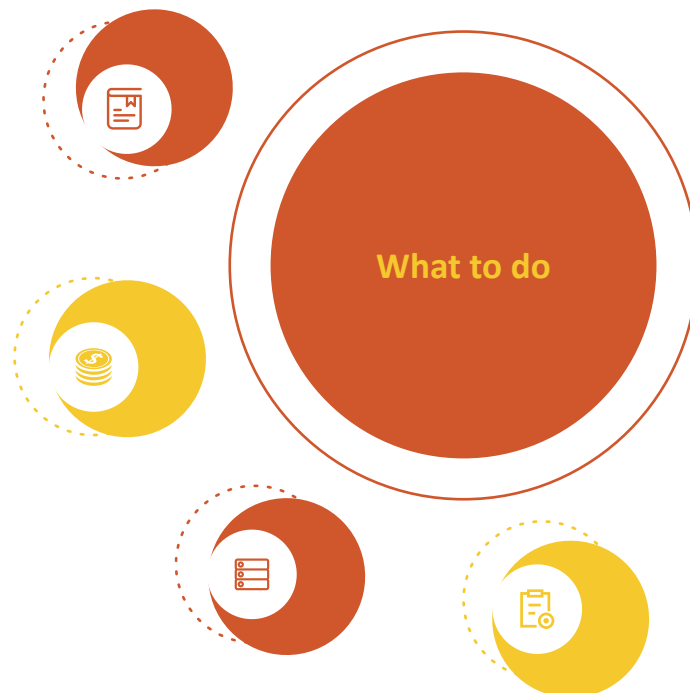
Invest in visitor centres, transport connections, booking systems, and digital platforms to make Aboriginal experiences more accessible and appealing across the national tourism landscape.

Domestic funding mechanisms

Offer subsidies, pilot programs, or co-marketing funds to encourage operators to trial Aboriginal tourism products, strengthen business models, and invest in quality improvements.

Sustainability + cultural integrity

Ensure national policies support cultural integrity, community ownership, and environmental stewardship, safeguarding long-term benefits for Indigenous communities and ensuring Aboriginal tourism develops in culturally grounded and sustainable ways.



8.4.2 Foster Repeat Visitation Through Deeper Connections

Why it matters

Repeat participation in Aboriginal tourism is driven by knowledge, personal values, and positive emotions. Travellers who feel enriched and personally connected are the ones most likely to return and spread positive word-of-mouth.

What to do

Educational depth

Create programs that go beyond surface-level performances, offering visitors the chance to understand cultural practices, values, and ways of life.

Emotional connection

Highlight hospitality, family connections, and shared experiences, which Chinese travellers strongly value.

Multi-visit ladders

Develop experiences that build progressively—such as introductory urban workshops, followed by regional immersive stays, and eventually long-duration cultural journeys and exchanges for repeat visitors.

Feedback loops

Establish feedback loops with Chinese travellers, using surveys, reviews, and digital tracking to refine products and ensure evolving alignment with market needs.

Image courtesy of Borrgoron Tours



PART 9: CONCLUSION

This study confirms that Aboriginal tourism represents one of Australia's most distinctive yet underutilised assets in the Chinese visitor market. While Chinese travellers associate Aboriginal culture with authenticity, creativity, and a deep connection to land and history, their actual experiences often remain superficial—limited to performances or symbolic rituals embedded in broader itineraries. Inbound tour operators and Chinese distribution partners alike point to fragmented supply, weak branding, and low awareness as major barriers. Compared internationally, Australia risks falling behind competitors such as New Zealand, Canada, and the US, where Indigenous tourism is supported by strong government strategies, immersive hubs, and iconic cultural symbols.

At the same time, the opportunities are compelling. Demand for authentic, interactive, and story-rich experiences is growing across the Chinese market, particularly among families, students, and high-end customised travellers. Survey findings underline that awareness, cultural literacy, and personal values are key drivers of participation and repeat visitation. When travellers gain deeper knowledge, emotional resonance, and opportunities for hands-on engagement, they are more likely to return and to advocate for these experiences.

The path forward requires a dual focus: demand-side initiatives to raise awareness, improve interpretation, and reframe Aboriginal tourism as premium and transformative; and supply-side reforms to professionalise offerings, foster collaboration, and build nationally recognised cultural symbols. With strategic investment, coordinated branding, and genuine partnerships with Indigenous communities, Aboriginal tourism can deliver both commercial growth and cultural pride. Ultimately, positioning Aboriginal experiences at the heart of the Chinese visitor journey offers Australia a powerful opportunity to differentiate its tourism offering, strengthen cross-cultural ties, and celebrate the world's oldest living culture on the global stage.

CONCLUSION

NOTES

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Image courtesy of Mabu Buru Tours