

Victoria's Aboriginal Tourism Development Plan 2006-2009

prepared by
Tourism Victoria



In conjunction with
Victoria's Aboriginal Tourism Industry

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Message from the Minister for Tourism, John Pandazopoulos

I am pleased to present *Victoria's Aboriginal Tourism Development Plan for 2006-2009*.

Victoria's Aboriginal culture and heritage is unlike that of any part of Australia. The State is home to a range of unique and contemporary Indigenous tourism attractions. However, the diversity and richness of this unique culture, interpreted through quality tourism experiences, is yet to be truly discovered.

The sector has grown considerably over recent years, with new Indigenous attractions, State Government funding, an accreditation program and marketing opportunities. But there is still work to be done if Aboriginal tourism in Victoria is to meet its potential.

The Aboriginal Tourism Development Plan aims to grow Aboriginal tourism and provide a pathway to success from new to established businesses in the tourism industry.

It will set the framework to strengthen Victoria's Indigenous attractions and will also ensure industry cooperation and collaboration to raise awareness of the State's accessible and unique Indigenous tourism assets

Further, the plan will contribute to the cultural and financial sustainability of Indigenous businesses and communities throughout Victoria. through greater business support and fostering of leadership .



JOHN PANDAZOPOULOS MP
Minister for Tourism and Major Events

Message from Chair of ATV

Aboriginal Tourism is an under valued asset in Victoria. All the research tells us that many international visitors and domestic travellers are seeking an Indigenous experience. What many have not realised is that they can gain this experience right here in Victoria.

Aboriginal Tourism Victoria, as the industry peak body, has worked in partnership with Tourism Victoria to develop the Victorian Aboriginal Tourism Development Plan for 2006 – 2009.

The Plan is a first step in a journey to strengthen the Indigenous tourism sector. This strategy is dedicated to providing a support mechanism to this industry including marketing assistance, business mentoring and assisting new and established Indigenous tourism businesses. It is designed to achieve greater economic sustainability as well as to provide the opportunity to educate the wider community about our unique culture.

Most importantly, the strategy captures the diversity, uniqueness and richness of Victorian Aboriginal tourism and what it has to offer as tourism experiences as an important aspect of everyday life in Victoria.

From Cultural Welcomes at major events to soft adventure tours, Indigenous tourism in Victoria offers an array of experiences that ranges from fine bush food dining, music performances, art displays to heritage walks that any tourist visiting our state can enjoy.

Victorian Indigenous people have lived in harmony with the land for thousands of years and have a strong connection to it. For Aboriginal people, both urban and rural, the land is central to our identity. It has a strong spiritual connection that has provided a meaningful lifestyle for Indigenous Australians since time immemorial. Tourism provides our Indigenous communities with a wonderful opportunity to determine how we wish to share and showcase our heritage and culture.

For Indigenous tourism to be successful, the challenge before all of us is to be creative, be prepared to step outside our own comfort zone and to recognise that partnerships need to be created across all sections of government and private enterprises. This Plan is an important first step.

JASON EADES
Chair ATV

Executive summary

Victoria's Indigenous tourism sector has been growing steadily for almost a decade, proving that it adds a vital and engaging dimension to the State's tourism product. Industry leaders such as Brambuk Aboriginal Cultural Centre, the Koorie Heritage Trust and Bunjilaka showcase the vibrancy of Victoria's Aboriginal culture and provide opportunities to learn about Indigenous history, stories and the contemporary lives of Aboriginal people.

During more recent years, many regional attractions have extended the message to wider touring markets. As a result of a new direction and a sense of cooperation among Indigenous operators, as well as renewed commitment from Government, the stage is now set for a major expansion of the sector.

By 2009, Victoria's Aboriginal cultural attractions will enjoy success and a well defined market position within the tourism industry, increased effectiveness of marketing activity, beneficial collaborations, financial and cultural sustainability, a cooperative atmosphere and better business practices.

Victoria's Aboriginal tourism industry is made up of a small number of businesses that are striving for greater professionalism and excellence. Victoria's Aboriginal cultural experiences differ to those offered in other states by providing access to more contemporary aspects of the culture. Consumer appeal for this positioning is yet to be tested in the marketplace and is an important aspect of this plan.

Victoria's Tourism Industry Strategic Plan 2002-2006 identified Aboriginal tourism as a product segment offering potential growth. It is important to Victoria because:

- It allows visitors to experience and learn about Victoria's unique and dynamic Aboriginal cultures.
- It has the potential to attract international visitors and those who seek quality interactive natural, cultural and outdoor adventure experiences.
- It has the potential to bring economic and social benefits to Aboriginal people and to those regions that have identified Aboriginal tourism as a culturally appropriate opportunity in their regional tourism development and destination plans.
- It has the potential to introduce an engaging new dimension to regional tourism product, to complement many existing tourism products and to broaden the tourism experience along Victoria's key touring routes.

Tourism Victoria produced its first industry development plan for Aboriginal tourism in 1997. It set out a series of strategies that included increasing the number of tourism businesses and their products, and involving Government and established tourism networks in assisting the sector to grow.

In 2003 the plan was reviewed and the successful outcomes and remaining issues identified. Since 1997, significant changes for Aboriginal tourism include:

- establishment of a business support service within the Department of Innovation Industry and Regional Development (Koorie Business Network)
- forming of a marketing co-operative (Aboriginal Tourism Marketing Association)
- a sector-specific accreditation program (Respecting Our Culture - ROC)
- production of high quality motivational brochures - Ochre Dreaming (2003) and Aboriginal Victoria (2005)
- formal representation at the 2005 Australian Tourism Exchange
- a detailed diagnostic study of Victoria's Aboriginal tourism enterprises (2005)
- joint employment of an Aboriginal Tourism Industry Officer by Tourism Victoria and the Koorie Business Network (2005)
- publication of Parks Victoria's Indigenous Partnership Strategy and Action Plan (see Appendix 2)
- a preliminary analysis of demand for the Aboriginal tourism product undertaken by the Commonwealth Government Indigenous Tourism: tailoring your tourism venture for success

- Tourism Victoria's image library updated 2006
- several new major indigenous attractions have been established
- State Government funding to develop Narana Creations, Koorie Heritage Trust, Brambuk - National Park and Cultural Centre and Ballarat Aboriginal Cultural Experience.

However, as is also the case throughout the tourism and small business sector generally, some Aboriginal tourism businesses have closed during this period and the issues identified in 1997 remain as barriers to development.

Objectives

The key objectives of this plan are:

1. Cooperation: To enhance sector cooperation, primarily through fostering Aboriginal tourism networks and by encouraging greater engagement with, and cooperation within, the tourism industry, Government and the broader community.
2. New initiatives: To assist with the establishment of Aboriginal tourism businesses or partnerships and Indigenous cultural tourism activities that are culturally appropriate and aim to attract domestic or international visitors.
3. Sustainability and growth: To ensure sustainability and growth of Aboriginal cultural enterprises by providing ongoing skills and support in leadership, business management, tourism and higher standards of customer service delivery.
4. Marketing: To collaborate with industry on marketing initiatives that increase visitation and revenue to Aboriginal cultural tourism activities, and develop consistent systems for monitoring marketing effectiveness.
5. Development: To support product and infrastructure development for the indigenous tourism sector that meets market demands and increases the range of quality experiences in Victoria.

Initiatives

Key initiatives identified to address these objectives include:

- Resources: Assisting in providing resources to a Victorian Aboriginal tourism industry and marketing body, including funding of a cooperative marketing program, so that it can act as the peak organisation in relation to all matters pertaining to Aboriginal tourism in Victoria.
- Leadership: Encouraging mentoring and training of potential Aboriginal tourism industry and business leaders, including investigating the development of an Aboriginal tourism leadership foundation that could provide scholarships and mentoring opportunities.
- Management: Facilitate greater coordination of the management and provision of government assistance applicable to Victoria's Aboriginal tourism businesses.
- Diversity and professionalism: Encourage the development of a greater diversity of culturally appropriate Aboriginal tourism experiences and ensure that these experiences provide high levels of visitor satisfaction.
- Accreditation: Extend support for Aboriginal tourism product development programs such as the 'Respecting Our Culture' accreditation program and programs available through the Koori Business Network.

- Industry development: Investigate opportunities for further development of built products and experiences that highlight traditional and modern Aboriginal cultural experiences.
- Networks: Extend networks and liaison between Aboriginal tourism organisations and individuals in other states and territories.
- Industry opportunities: Encourage greater links and engagement with complementary products and sectors, such as conferences, boutique accommodation and nature-based tourism.
- Government support: Establish a State Government Inter-Departmental Committee (IDC) to provide a more integrated approach to supporting, developing and implementing Aboriginal tourism initiatives.
- Government-funded initiatives: Support the development of a number of major Government-funded initiatives, which will significantly contribute to the Victorian indigenous tourism sector, such as:
 - The Aboriginal Land and Economic Development Program
 - Ballarat Aboriginal Cultural Experience
 - Brambuk the National Park and Cultural Centre
 - Bunjilaka - Melbourne Museum
 - Early Australians Centre, Mildura

1. Introduction

Victoria's Aboriginal tourism industry is made up of a small number of businesses striving for professionalism and excellence.

Victoria's indigenous tourism sector has been growing steadily for almost a decade, proving that it adds a vital and engaging dimension to the State's tourism product. Industry leaders such as Brambuk - The National Park and Cultural Centre, the Koorie Heritage Trust, Narana Creations and Bunjilaka showcase the vibrancy of Victoria's Aboriginal culture and provide opportunities to learn about Indigenous history, stories and the contemporary lives of Aboriginal people.

During more recent years many regional attractions have extended the message to wider touring markets. As a result of a new direction and a sense of cooperation among indigenous operators, as well as renewed commitment from Government, the stage is now set for a major expansion of the sector.

Across Australia there are 260 Aboriginal language groups that represent a diverse range of cultures. There are 38 Aboriginal language groups in Victoria alone. Aboriginal people in Victoria have an ancient and traditional culture with a strong connection to land and water that has been influenced by many changes, resulting in a contemporary, urban lifestyle.

Victoria's Aboriginal tourism sector lacks, however, strategic and distinctive branding that would better communicate its market appeal and help to unify the various product offerings.

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- It has the potential to introduce an engaging new dimension to regional tourism product, to complement many existing tourism products and to broaden the tourism experience along Victoria's key touring routes.

Tourism Victoria produced its first industry development plan for Aboriginal tourism in 1997. It set out a series of strategies that included increasing the number of tourism businesses and their products, and involving Government and established tourism networks in assisting the sector to grow.

In 2003 the plan was reviewed and the successful outcomes and remaining issues identified. It was noted that there had been significant changes to the organisations directly involved in indigenous tourism business development. These organisations were represented in an Aboriginal Tourism Reference Group (ATRG) formed by Tourism Victoria to review this plan (See Appendix 1 for ATRG members).

Victoria's Aboriginal Tourism Development Plan 2006-2009 builds on that first plan, with contributions from members of the ATRG. It also includes a comprehensive diagnostic review of Victoria's Aboriginal tourism businesses, which was commissioned by Tourism Victoria and the Koori Business Network. The review sought to ascertain the needs and aspirations of sector stakeholders, and major recommendations from it have been incorporated into this plan.

Since 1997, significant advances for Aboriginal tourism include:

- establishment of a business support service within the Department of Innovation, Industry and Regional Development (Koori Business Network)
- forming of a marketing co-operative (Aboriginal Tourism Marketing Association) with Tourism Victoria Board Chairman, John Morse, appointed as the patron
- a sector-specific accreditation program (Respecting Our Culture - ROC)
- production of high quality motivational brochures - Ochre Dreaming (2003) and Aboriginal Victoria (2005)
- formal representation at the 2005 Australian Tourism Exchange
- a detailed diagnostic study of Victoria's Aboriginal tourism enterprises (2005)
- joint employment of an Aboriginal Tourism Industry Officer by Tourism Victoria and the Koori Business Network (2005)
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- several new major indigenous attractions have been established
- capital works funding was received from the Regional Infrastructure Development Fund to develop Narana Creations and Brambuk - National Park and Cultural Centre
- AAV community support funding received to build The Koorie Heritage Trust announcement of the Victorian Aboriginal Land and Economic Development Program (May 2005) - a state-wide program to be delivered over three years, of which \$4.5 million will be provided for capital spending and \$5.1 million for training programs and feasibility studies to support economic independence and employment. Projects will be developed in partnership between Aboriginal communities, Aboriginal Affairs Victoria, the Department of Sustainability and Environment and Parks Victoria.

However, as is also the case throughout the tourism and small business sector generally, some Aboriginal tourism businesses have closed during that time and the issues identified in 1997 remain as barriers to development. These are outlined further in this document, as are the strategies that the industry believes will bring sustainability and prosperity to this unique and important Victoria tourism sector.

The proposals identified in this plan are consistent with relevant Victorian Government policies and legislation, and it is recognised that a whole-of-government approach needs to be taken to ensure that economic, environmental and social sustainability are addressed. This plan proposes a more coordinated approach to ensure integration of programs and resources applicable to Victoria's Aboriginal tourism sector.

The significant impacts of other areas of government on the Aboriginal tourism sector are outlined in a summary of agencies and relevant policies (**Appendix 2**)

2. What is Aboriginal tourism?

This plan uses a broad definition of the type of business or activity that can provide a meaningful Aboriginal tourism experience. In Victoria, a better term may be Aboriginal cultural tourism experience, as many products are of an educative and interpretative nature.

This plan recognises enterprises or activities that:

- operate in Victoria
- re open to the public and provide consenting contact with Aboriginal people and/or interpretation of their culture or their land
- are owned or operated by Aboriginal people, or are owned/operated in partnership with non-Aboriginal people
- promote authentic and distinctive local Aboriginal culture, whether traditional or contemporary, sometimes with other Australian Indigenous cultures.

Enterprises and activities include guided tours, education programs, accommodation, performance, exhibitions, interpreted sites (cultural heritage and natural), bush tucker or catering, craft and retail outlets.

However, it may also include more contemporary activities such as public events and informal spontaneous opportunities for interaction and learning. These may be a departure from the stereotypical representations of traditional Indigenous culture often presented to tourists, but reflect the view that Indigenous people have changed with the times and their contemporary achievements and issues should be equally valued and offered.

Several of these cultural experiences may not meet the criteria for a tourism enterprise, such as regularity and consistency of operation, profit-orientation, active involvement in industry associations and marketing campaigns as well as a strong focus on customer service.

There is also sometimes a perceived gap between what Indigenous businesses have to offer and what is expected by the tourism industry. This may happen when an enterprise has been established for reasons other than tourism - most commonly for community development, cultural education and preservation. Tourism, therefore, can be a minor consideration for their operation, and measurement of the success of these businesses based only on profit and other commercial grounds can be misleading.

This plan acknowledges the importance of these other priorities, and offers strategies for partially closing the gap and setting realistic expectations for those enterprises that have accepted, or wish to accept, the challenge of becoming an active player in Australia's buoyant tourism and travel industry.

A profile of the majority of Victoria's current Aboriginal tourism operators (as at July 2005) and a summary of the major

business categories relating to Aboriginal tourism is included in Appendix 3.

3. The research: Aboriginal tourism markets

Aboriginal tourism is a relatively small product segment in Victoria. There are, however, various international and domestic markets that have an affinity for Aboriginal cultural experiences. The domestic market offers untapped potential for Aboriginal tourism, but more detailed data and analysis is required to accurately determine product-consumer targeting. The education sector, both domestic and international, is an important and emerging market.

The following table outlines domestic and international visitors to Victoria who participated in an Aboriginal tourism experience.

Year Ending December 2004 Victoria Australia

Domestic		
Overnight Visitors (000s)	68	475
Visitor Nights (000s)	287	4,273
Daytrip Visitors (000s)	12	175
International		
Overnight Visitors (000s)	231	597
Nights (000s)	4,802	27,979

International visitation

In the year ending December 2004 597,000 international Aboriginal tourism visitors travelled to Australia, accounting for almost 28 million nights. Of these visitors, 39 per cent visited Victoria during this period.

In the year ending December 2004 231,000 Aboriginal tourism visitors travelled to Victoria, accounting for 4.8 million nights. Aboriginal tourism visitors represent 18 per cent of all international visitors to the State.

The average length of stay for Aboriginal tourism visitors to Australia was 46.8 nights, compared to an average length of stay of 20.8 nights for Aboriginal tourism visitors to Victoria.

The largest single source market of Aboriginal Tourism visitors to Victoria (for the year ending December 2004) was Europe, with approximately 69,000 Aboriginal tourism visitors. Other significant markets include the United Kingdom (56,000), North America (38,000) and Asia (31,000).

Domestic overnight visitation

Australia received 475,000 domestic overnight Aboriginal tourism visitors for the year ending December 2004, accounting for 4.3 million domestic Aboriginal tourism visitor nights. The average length of stay was 9 nights.

During the same period Victoria received 68,000 domestic overnight Aboriginal tourism visitors, accounting for 287,000 visitor nights. The average length of stay for Aboriginal tourism visitors to Victoria was 4.2 nights.

Domestic daytrip visitation

In the year ending December 2004, there were 175,000 domestic daytrips undertaken in Australia and 12,000 domestic daytrips undertaken in Victoria by Aboriginal tourism visitors.

Profile of domestic Aboriginal tourism visitors

The domestic Aboriginal tourism market was primarily driven by the New South Wales market, comprising 27 per cent of all Aboriginal tourism visitors, and the Queensland and Victorian markets, each with 21 per cent market share.

Age group (% of Aboriginal tourism visitors)

Domestic overnight Aboriginal tourism visitors in Australia were most likely to be aged between 45-64 years (38 per cent) or 25-44 years old (37 per cent).

Age Group	Aboriginal Tourism Visitor	Total Australia
15 - 24 years	7%	17%
25 - 44 years	37%	39%
45 - 64 years	38%	33%
65+ years	18%	11%

Lifecycle (% of Aboriginal Tourism Visitors)

Domestic overnight Aboriginal tourism visitors tended to be in the parent (35 per cent) and older non-working (24 per cent) lifecycle segments.

Lifecycle	Aboriginal Tourism Visitor	Total Australia
Single, No Kids	11%	21%
Couple, No Kids	15%	14%
Parent	35%	35%
Older Working	15%	14%
Older Non-Working	24%	15%

Travel behaviour of domestic Aboriginal tourism visitors

Domestic overnight Aboriginal tourism visitors by purpose of visit

Sixty-nine per cent of Aboriginal tourism visitors were holiday visitors and 18 per cent were visiting friends and relatives (VFR).

Purpose of Visit	Aboriginal Tourism Visitor	Total Australia
Holiday or leisure	69%	41%
Visiting friends and relatives	18%	36%
Business	8%	19%
Other	5%	4%

Length of trip (% of Aboriginal tourism visitors)

Thirty-six per cent of domestic overnight Aboriginal tourism visitors in Australia were on a trip of 4-7 nights. A further 30 per cent stayed on a short trip of 1-3 nights, whilst the remaining 34 per cent stayed 8+ nights.

Length of Trip	Aboriginal Tourism Visitor	Total Australia
1-3 nights	31%	68%
4-7 nights	36%	21%
8-14 nights	19%	8%
15+ nights	15%	3%

Travel party (% of Aboriginal tourism visitors)

The majority of Aboriginal tourism visitors in Australia travelled in an adult couple (34 per cent), with friends or relatives (24 per cent), or in a family group (22 per cent). Aboriginal tourism visitors were least likely to be travelling alone (11 per cent) or with business associates (2 per cent).

Travel Party	Aboriginal Tourism Visitor	Total Australia
Travelling alone	11%	26%
Adult couple	34%	28%
Family group - parents and children	22%	19%
Friends or relatives	24%	21%
Business associates	2%	4%
Other	7%	2%

An Australia-wide study funded in 2004 by the Department of Industry, Tourism and Resources and other public and private organisations has provided the first detailed information about domestic demand for Aboriginal tourism product.

The study found that just over half of all adult Australians have participated in an Indigenous tourism activity during the past five years. The most common activities were attending galleries that specialised in Indigenous art, shops and markets selling Indigenous crafts or going to a museum about indigenous people and their history. About 6.4 million adult Australians expressed interest in participating in an Indigenous tourism experience, depending on its price and location.

Those Australians predisposed to participating in Indigenous tourism are likely to be working full time, living in a one-person household and aged between 25-34 years and 45-54 years.

The vast majority of Australians expressed a preference to experience an Indigenous product within their own state or territory. The majority also expressed a clear preference for Indigenous activities situated in an outback setting, except for luxury resorts (described below), which they preferred in a coastal setting. Victorians stated that they would prefer to experience outback indigenous product in the Northern Territory. The Northern Territory is also the preferred location for full cultural immersion activities by all Australians.

The indigenous tourism product attracting highest potential demand are luxurious 4.5 star resorts where traditional culture can be experienced, including guided walks during the day, traditional dance and music at night and where both everyday and traditional foods are available. About 3.5 million adult Australians expressed interest in this concept,

at a preferred price point of \$145 per person per day.

However, nearly 3 million adult Australians across most age groups also expressed interest in attending an Indigenous theme park, where traditional Indigenous culture, people and art can be experienced with family or friends, at a preferred price point of \$95 per person per day.

A similar number said they would also enjoy an outback learning centre experience where they could learn about authentic traditional Indigenous culture, including the local environment and animals, at a preferred price point of \$95 per person per day.

About 2.8 million adult Australians across most age groups expressed an interest in a place where they could stay overnight with and learn from Indigenous people about their traditional culture and about their life in modern Australia, at a preferred price point of \$145 per person per day.

About 2.2 million adult Australians across most age groups said that they would be interested in a full cultural immersion where they could get to know indigenous people by participating in their daily activities, at a preferred point of \$95 per person per day.

Research Sources:

National and International Visitor Surveys, year ending December 2004, Tourism Research Australia.

Current definition of Aboriginal tourism used in the National Visitor Survey and the International Visitor Survey:

- International - 'Experience Aboriginal art or craft and cultural displays' 'Visit an Aboriginal site or community' 'Attend Aboriginal performance'.
- Domestic - 'Experience Aboriginal art or craft and cultural displays' 'Visit an Aboriginal site or community.'

4. Victoria's marketing advantage

Tourism data indicates that international visitors have a high interest in experiencing distinctly Australian culture, including our indigenous culture. Victoria should therefore continue to attract a higher proportion of this market.

The domestic market is important for Aboriginal tourism, particularly those businesses operating in regional Victoria. There is real potential to continue growing the domestic market for indigenous cultural experiences (See: 'The research: Markets for Aboriginal tourism'). The relatively low inclination of mainstream domestic markets to experience Aboriginal tourism, however, will require increased and more strategic marketing efforts as well as the broadening and repositioning of some of Victoria's product into more engaging, interactive and entertaining formats.

Several businesses currently seek to engage and entertain their education and group markets, but find it unviable to provide similar experiences to F.I.T. markets. It is also acknowledged that the potential for intrusion into personal and sensitive cultural matters creates reticence among some operators to provide a higher level of visitor engagement.

It should also be noted that most research on indigenous tourism describes businesses that interpret traditional culture. There is no tourism research about visitors' interaction with non-traditional indigenous attractions. Victoria should, therefore, pursue two distinct directions in promoting Indigenous product:

1. Continue to emphasise major indigenous product that is market-ready, while the rest of the industry continues to develop.
2. Strengthen the positioning and marketing advantage over indigenous products promoted in other states by:

- Undertaking analysis of its market position, based on research, and consequently developing a brand that clearly communicates Victoria's strengths and points of difference in Aboriginal tourism.
- Developing ways to attract and engage domestic audiences, emphasising the uniqueness of Victoria's indigenous culture.
- Promoting Aboriginal tourism enterprises as important and enjoyable experiences along Victoria's key touring routes and its destinations.
- Emphasising the marketing of those components and activities of Aboriginal tourism businesses that create awareness and education through interaction and entertainment, particularly for mainstream audiences.
- Promoting visitor access to presentations of contemporary indigenous issues and perspectives, for example in the arts, social sciences or environmental management (the activities of Parks Victoria and Arts Victoria contribute significantly to the above strategies and are included in this plan).
- Optimising Victorian participation in the national Respecting Our Culture (ROC) business accreditation program, through more effective communication, understanding and accessibility.
- Maximising participation of Aboriginal tourism businesses in mutually agreed cooperative marketing campaigns

5. Key issues

The Centre for Regional Tourism Research has reported that from state to state there are common barriers to the development of indigenous tourism. These are:

- lack of research into the size and interests of the markets for indigenous experiences
- lack of sustained support for new businesses and partnerships
- poor coordination between related government programs
- lack of government capital expenditure
- lack of skills and access to services for Aboriginal enterprises
- consumer difficulty in obtaining information about indigenous attractions.

In Victoria, the Aboriginal Tourism Reference Group (ATRG) has identified the need to engage more with, and understand better, the wider tourism industry as an issue affecting the development of Aboriginal tourism businesses, particularly in regional areas. Without such integration, the sector risks being regarded by the wider industry as too niche and marginalised.

The ATRG has identified three main stakeholders in this sector:

1. A. Aboriginal tourism operators: This group's key concerns are with acquiring business and tourism skills and support. Issues they face include:
 - Lack of practical advice and one-to-one support to assist the establishment of their business or cultural activity, as well as a lack of ongoing support to ensure their business is sustainable. Lack of sustainability has meant that the sector has remained very small and is under-represented in the tourism industry.
 - Training programs do not always meet the needs of the sector and are, therefore, avoided by many operators.

- Assistance is not tailored to address cultural needs such as different approaches to making and using profits, and protocols for respecting traditional heritage.
 - Government services lack coordination, requiring different approaches to different agencies and sometimes generating multiple visits to businesses on similar topics.
 - Business development services, such as the Koori Business Network, need to be extended to include tourism expertise, so that realistic assessments can be made regarding tourism potential and the most appropriate support to be given.
2. B. The tourism and travel industry: Key concerns are for sustainability and reliability of indigenous tourism operations so that they can be included with confidence in the range of industry marketing activities. The industry's concerns about some indigenous businesses include:
- A lack of data regarding currently accessible indigenous attractions and events, the size of the tourism market for those attractions and the expectations and satisfaction levels of customers.
 - A lack of understanding of Aboriginal community capacity, their social goals, operating environment, profit objective and even the relative importance of tourism to some enterprises.
 - Difficulty accessing and maintaining consistent communication with some businesses.
 - Lack of funds available for marketing activities and association memberships.
 - Lack of engagement with the local and regional tourism structures.
 - Lack of adequate staffing and an orientation to customer service.
 - Lack of easy to book packaged itineraries that pay standard industry commissions.
3. C. The customer: Key concern is for a satisfying and meaningful interaction with indigenous culture. The issues here may include:
- Lack of information about what experiences and products are available.
 - Providing those experiences and products in ways easily accessed by customers e.g. via websites, visitor centres, or in major cities.
 - Lack of product that imparts knowledge and builds awareness through engagement, interaction and entertainment.
 - Reluctant to engage with the sector possibly because of perceived political agendas.
 - Lack of feedback systems for customers to comment on their experiences.
 - Lack of training to enable businesses to achieve higher standards of interpretation and customer service.

6. Aboriginal tourism development plan

6.1 Vision

By 2009, Victoria's Aboriginal cultural attractions will enjoy success and a well defined market position within the tourism industry, increased effectiveness of marketing activity, beneficial collaborations, financial and cultural sustainability, a cooperative atmosphere and better business practices.

6.2 Aim

The aim of the *Aboriginal Tourism Development Plan 2006-2009* is to provide a clear pathway to business success for indigenous cultural tourism attractions, from start-up to high level sustainable involvement in the tourism industry.

With sustainability, the sector will be able to grow to the benefit of indigenous people and those visitors attracted to Victoria's unique indigenous culture.

This plan will be reviewed and updated annually by Tourism Victoria in conjunction with the peak Aboriginal tourism industry body. A detailed inter-agency marketing and development action list will be prepared annually, which will specify the resources to support each strategy.

6.2 Key objectives

Cooperation: To enhance sector cooperation, primarily through fostering Aboriginal tourism networks and by encouraging greater engagement with, and cooperation within, the tourism industry, Government and the broader community.

New initiatives: To assist with the establishment of Aboriginal tourism businesses or partnerships and indigenous cultural tourism activities that are culturally appropriate and aim to attract domestic or international visitors.

Sustainability and growth: To ensure sustainability and growth of Aboriginal cultural enterprises by providing ongoing skills and support in leadership, business management, tourism and higher standards of customer service delivery.

Marketing: To collaborate with industry on marketing initiatives that increase visitation and revenue to Aboriginal cultural tourism activities, and develop consistent systems for monitoring marketing effectiveness.

Development: To support product and infrastructure development for the indigenous tourism sector that meets market demands and increases the range of quality experiences in Victoria.

The pathway to individual business growth is indicated by the following diagram, which sets out four stages; from start-up to marketing and service excellence, and lists the organisation that should take the lead role at each stage.

A pathway to business success

Stage 1

Establishment

Start-up advice, mentoring and skills in operating a commercial venture of any sort.

Indigenous people with ideas for business or cultural enterprises and partnerships should be referred to this stage

Support agency

Koori Business Network

In partnership with TAV, Tourism Victoria, RTAs, education providers and small business development services.

Koorie Business Network is the starting point for enquiries and will assist directly or refer to the most appropriate service.

Stage 2

Building a tourism business

Specialist advice in assessing tourism potential and contacts and assistance in attracting tourists and tourism revenue.

Focus is on benefiting from local tourism activity, linking to visitor information centres and regional tourism marketing networks

Support agency

Various agencies

RTAs, campaign committees, TAV, Koorie Business Network, ROC program and Tourism Victoria

Tourism expertise will be available for on-site visits and training throughout the state.

Stage 3

Growth, stability & success

Ongoing opportunities for training, networking, better practice, on-site mentoring, accreditation and membership of industry groups.

Focus is on establishing sustainable and reliable business practices and customer service at whatever level suits the business.

Support agency

Networks and clusters

via the ROC program, ATV, the Indigenous Tourism Leadership Group and Indigenous Tourism Business Ready Program

Key requirements include cooperative marketing activity, training resources and endorsement of funding applications

Stage 4

Reaching international markets

Ongoing opportunities and assistance to develop and support market-ready attractions and other stable businesses that seek to participate in marketing at state and international levels

Support agency

Tourism Victoria

In partnership with Koori Business Network and the Aboriginal tourism industry

TV will initially assist and resource the peak industry body, the formation of an inter-departmental committee, the hosting of an annual forum, plus high-level advice.

It is recommended that the monitoring of this pathway be undertaken by the Aboriginal Tourism Marketing Association (ATV) as well as relevant Government agencies such as Tourism Victoria, Arts Victoria, Aboriginal Affairs Victoria, Parks Victoria, Koori Business Network, Service Skills Victoria, Department of Innovation, Industry and Regional Development, Indigenous Tourism Australia and Tourism Australia.

Key objective 1: Cooperation

Aim: To enhance sector cooperation, primarily through fostering Aboriginal tourism networks and by encouraging greater engagement with, and cooperation within, the tourism industry, Government and the broader community.

Action	Rationale	Key stakeholders	Priority
1. Hold an annual forum of relevant government agencies and industry groups to review and report on results and/or progress achieved in addressing the actions of this plan. The annual report to be circulated to all relevant agencies.	<p>To maximise resources available to the Aboriginal tourism sector, effective coordination of Government programs and policies needs to take place.</p> <p>These forums could provide an annual focus for the industry and should aim to provide macro-level coordination, networking, marketing and training opportunities for the industry.</p>	<ul style="list-style-type: none"> • TV • KBN • PV • AV • AAV • ATV • IBA • ATA 	<p>Annual</p> <p>July</p>
2. Establish an inter-departmental committee (IDC) to ensure coordination between agencies and their staff involved in Aboriginal tourism affairs. This committee should include an industry representative from the active membership of the peak industry sector organisation.	<p>Collaboration will help to maximise resources available to the sector and provide greater clarity in the planning and execution of projects relevant to the sector.</p>	<ul style="list-style-type: none"> • TV • PV • KBN • AV • AAV • ATV 	Ongoing
3. Government agencies to use ATV as a body to refer to for issues and projects pertaining to the development and marketing of the Aboriginal tourism sector in Victoria. Note: this does not preclude Government agencies liaising directly with individual businesses on more specific issues.	<p>A restructured ATV as an effective industry body will provide Government with a one-stop shop for consultation and will significantly reduce the impact of consultation on individual businesses.</p>	<ul style="list-style-type: none"> • TV • KBN • PV • AV • AAV • ATV 	Ongoing

4. ATV to broaden its focus to assume the role of an industry development and marketing body for Victoria's Aboriginal tourism sector.	Victorian Aboriginal tourism needs to speak with one voice on all matters pertaining to its marketing and development, and to provide government with a one-stop shop for consultation on whole-of-sector matters.	<ul style="list-style-type: none"> • ATV membership 	Mid 2006
5. Provide resources to enable the development of a business and marketing plan for the Aboriginal Tourism Marketing Association (ATV), to better reflect its new role as a more broad-based industry body.	This is an opportunity for ATV to increase its representative business and marketing focus. ATV needs to be strongly focused and its membership needs to recognise the key role they collectively have to play in developing the industry sector	<ul style="list-style-type: none"> • TV • ATV • KBN 	Mid 2006
6. Increase financial and in-kind resources to enable ATV to operate effectively as Victoria's peak Aboriginal tourism industry organisation.	A three-year commitment to strengthen the role and efficiency of ATV will improve communication, encourage cooperation and promote a wider vision.	<ul style="list-style-type: none"> • TV • KBN • PV • AAV 	Mid 2006
7. ATV to establish a strategic alliance with the Victorian Tourism Industry Council and other beneficial organisations, both at the state and national level.	The sector requires recognition and awareness among the wider tourism industry at a state and national level. This will provide the sector with wider vision, industry intelligence, a higher profile and should facilitate greater cross-sector integration and cooperation.	<ul style="list-style-type: none"> • ATV • TA • TV • VITC • ITA • TA 	Late 2006
8. Tourism Victoria and other government agencies to recognise ATV as the peak organisation in relation to all matters pertaining to Aboriginal tourism in Victoria.	The establishment of the Aboriginal Tourism Reference Group creates an undesirable two-tier structure for consultation. Non-ATV organisations represented on the ATRG should be invited to become ATV members to consolidate representation and enhance communication within that group.	<ul style="list-style-type: none"> • TV • ATV • PV • AV • KBN • AAV 	Mid 2006
9. Use effectively mentoring and training programs in order to build the pool of potential industry sector leaders.	There is a need to nurture Aboriginal tourism leaders to provide sustainable leadership for organisations such as ATV.	<ul style="list-style-type: none"> • TV • KBN • VH • VILC • SDNF 	Ongoing
10. Upgrade and maintain the ATV website to reflect current issues, industry information, meeting schedules and marketing opportunities.	Electronic communication is a cost effective and timely way to communicate with Aboriginal tourism businesses and other stakeholders.	<ul style="list-style-type: none"> • Aboriginal Tourism Officer 	Quarterly ongoing

		<ul style="list-style-type: none"> • ATV exec 	
11. Develop a communication strategy to determine the most effective method/s to communicate with Aboriginal tourism businesses.	Will enhance communication in the industry sector.	<ul style="list-style-type: none"> • Aboriginal Tourism Officer • ATV 	Mid 2006
12. Encourage Victoria's Aboriginal products and associations to engage with local and regional tourism organisations, other industry organisations and cooperative marketing bodies.	It is essential that Aboriginal tourism businesses link with the mainstream tourism industry for networking purposes and to receive industry information.	<ul style="list-style-type: none"> • Sector-wide 	Ongoing
13. Communicate market trends and the potential contribution of the Indigenous tourism sector to the mainstream tourism industry, via seminars and forums.	The current and potential value of the Indigenous sector to the tourism industry is currently understated or not understood. An appreciation by a wider industry audience will increase marketing opportunities.	<ul style="list-style-type: none"> • ATV • TV • TAV • TA 	Ongoing
14. Indigenous tourism development to be included in relevant state-wide tourism industry sector strategic plans, in particular nature-based, adventure, arts and culture, and food and wine tourism plans.	The sector and its potential contribution to mainstream tourism are currently understated in tourism plans.	<ul style="list-style-type: none"> • TV • ATV 	Ongoing
15. Develop and implement tourism industry cultural respect training programs to increase understanding within the tourism and hospitality communities.	There is a need to foster greater understanding of Aboriginal cultural issues amongst the tourism industry.	<ul style="list-style-type: none"> • KHT • PV • TV • TA • ATV 	Ongoing
16. Extend networks and liaison between Aboriginal tourism organisations and individuals in other states and territories. Build contacts and participate in national discussions about the development of the sector, including Commonwealth Government initiatives.	There is a need to raise the profile of Victorian Aboriginal tourism at a national level and to overcome a prevailing notion that Victoria lacks notable product. The Commonwealth Government is providing several opportunities for growth in this sector.	<ul style="list-style-type: none"> • ATV • TV • TA • ITA 	Ongoing
17. Facilitate strong cross-promotion of Aboriginal tourism product among	The sector must present an integrated, cohesive image to the consumer and	<ul style="list-style-type: none"> • ATV 	Ongoing

sector operators, particularly through joint publications and web links.	make it easy for consumers to obtain information about other relevant products. Cost effective marketing.	members	
18. Establish an annual planner for ATV meetings and activities, with at least two meetings a year to be held in an appropriate location in regional Victoria.	This will encourage forward planning by industry members and promote access for those businesses that find it difficult to travel to Melbourne. Regional meetings will help to promote greater awareness of other Aboriginal tourism businesses within the sector.	<ul style="list-style-type: none"> Aboriginal Tourism Officer ATV 	Ongoing
19. Share information about the direct government assistance available to public and private sector Aboriginal tourism operators, especially small family-operated businesses. Produce and regularly update a simple printed or web-based fact sheet.	The perception that government financial and other resources are predominantly available to public sector or semi-public sector enterprises is creating some friction within the sector. Many operators are missing funding opportunities through lack of knowledge and adequate dissemination of the information.	<ul style="list-style-type: none"> TV KBN PV AV AAV 	Late 2006

Key objective 2: New initiatives

Aim: To assist with the establishment of Aboriginal tourism businesses or partnerships and indigenous cultural tourism activities that are culturally appropriate and aim to attract domestic or international visitors.

Action	Rationale	Responsibility	Priority
20. Establish a central source of information and assistance for tourism business development.	<p>There is a need to make information about business development services and funding offered by Government and indigenous organisations available at one central source.</p> <p>Many small business ventures fail at an early stage due to poor business planning and expertise. Identifying potentially successful businesses at an early stage will assist in overcoming this problem</p>	<ul style="list-style-type: none"> KBN TV 	Ongoing
21. Establish partnerships between Tourism Victoria, Commonwealth agencies and peak Aboriginal tourism bodies to ensure that there are effective and innovative ways of delivering tourism expertise to Aboriginal enterprises throughout the	There are currently few partnerships and funding opportunities for skills development for Aboriginal tourism businesses are lacking. Sector operators emphasise that work-based training and mentoring is the most effective for Aboriginal tourism businesses.	<ul style="list-style-type: none"> TV TA ATA ITA ATV 	Ongoing

State.			
22. Promote extensively the Koori Business Network as the industry's first point of contact for obtaining specialist business development advice for potential and fledgling Aboriginal tourism operators. Minimise paperwork involved in the application process and manage each applicant individually.	This is core business for the Koori Business Network, but also includes education providers, TAV, various government agencies and access to the Indigenous Tourism Business Ready Program. Realistic market analysis and strategic product development needs to be a fundamental part of all early advice or training provided to start-up ventures.	<ul style="list-style-type: none"> • KBN • SBV 	Ongoing
23. Introduce a pilot program to place Aboriginal people who aspire to establish a tourism business or are newcomers to the industry, with an experienced operator to help them gain personal understanding and experience before committing their own resources to such a venture.	There are very limited opportunities for industry aspirants within the sector to gain hands-on experience and an appreciation of the rigor and commitment required to operate a tourism business.	<ul style="list-style-type: none"> • Facilitated by PV assisted by TV, KBN and TA 	2006-2007
24. Create fixed term work placements for Aboriginal people to operate eco tours within the management structures of Victoria's national and state parks and reserves.	This program will provide a no-risk environment for aspiring Aboriginal tourism operators to trial eco tour business opportunities and to become ready for business. At the end of the work placement the recipient could opt to continue operating tours within the Parks structure or to establish their own business.	<ul style="list-style-type: none"> • PV • DSE 	2006-2007
25. Encourage operators to build links and relationships with other relevant State and National organisations such as Tourism Victoria, MCVB, Tourism Alliance Victoria, Parks Victoria, ATV, ITA, IBA etc.	There is a need for greater links between industry to maximise available opportunities.	<ul style="list-style-type: none"> • Aboriginal tourism businesses • TV 	Ongoing

Key objective 3: Sustainability and growth

Aim: To ensure sustainability and growth of Aboriginal cultural enterprises by providing ongoing skills and support in leadership, business management, tourism and higher standards of customer service delivery.

The key outcome is to encourage indigenous enterprises with the skills and financial stability to participate at their chosen level in the tourism industry, fostering professionalism and excellence.

Action	Rationale	Responsibility	Priority
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26. Actively promote the Respecting Our Culture (ROC) accreditation program, emphasising its business development benefits. Full content details to be included on relevant websites.	ROC is the peak Aboriginal tourism cultural/business development tool in Australia. There has been some misunderstanding among the sector about the authenticity component of the program.	<ul style="list-style-type: none"> • ROC • ATA • KBN • BBTA • TABV 	Ongoing
27. Enable ATV to position itself as a facilitator of specialist advice, networking and marketing opportunities.	The services and resources available through government agencies and private sector organisations can be confusing for Aboriginal tourism operators. ATV should act as a 'filtering' mechanism and a first point of contact to the sector for the various providers.	<ul style="list-style-type: none"> • Relevant government agencies • ATV • IBA 	Ongoing
28. Develop ATV forums as 'not to be missed' learning and information sharing opportunities for members, featuring specialist speakers and trainers on industry-specific topics.	ATV forums provide a non-confronting and mutually supportive environment in which operators can acquire industry information and skills.	<ul style="list-style-type: none"> • ATV • TV • KBN • PV 	Ongoing
29. Deliver industry specific workshops and seminars covering topics such as marketing, risk management, and business development, also linked with the mainstream tourism industry.	Few training programs specifically address Aboriginal tourism business needs. Providers need to understand and empathise with indigenous issues. Several established programs have been developed at the national level and should be considered before attempting to develop any new training programs.	<ul style="list-style-type: none"> • KBN • ROC Coordinator • ATA • training providers 	Ongoing
30. Ensure that training providers focus on customer service within existing programs as part of their program delivery.	Customer service is an integral component of a successful tourism enterprise.	<ul style="list-style-type: none"> • KBN • ROC Coordinator • training providers • TMA 	Ongoing
31. Establish a mentor scheme to assist tourism business development on-site. Identify suitable mentors amongst the indigenous and non-indigenous business community who can be matched with each business in question and the needs of individual operators.	Mentoring is often provided as part of a 'start-up' program, yet many Aboriginal tourism businesses could benefit from ongoing, ad hoc assistance that can be effectively delivered by a respected individual.	<ul style="list-style-type: none"> • KBN • ROC Coordinator • TV • Small Business Counselling Service 	December 2006

32. Encourage and support operator participation in regional, state and national tourism awards.	Tourism awards provide recognition to high achievers, and are an effective business development tool for all participants.	<ul style="list-style-type: none"> • Sector-wide 	Ongoing
33. Develop an exit survey for Aboriginal tourism businesses to assess reasons for closure.	Many Aboriginal tourism businesses are not sustainable in the long term and it is vital to the growth of the industry to understand why.	<ul style="list-style-type: none"> • KBN • TV • ATV 	December 2006

Key objective 4: marketing

Aim: Marketing: To collaborate with industry on marketing initiatives that increase visitation and revenue to Aboriginal cultural tourism activities, and develop consistent systems for monitoring marketing effectiveness.

The key outcome is a greater awareness and wider range of contemporary and traditional Victorian indigenous products marketed cost-effectively both locally and throughout the world.

Action	Rationale	Responsibility	Priority
34. Develop a market positioning based on research findings, and related branding, for Victoria's Aboriginal tourism industry, including identification of key target markets.	Strategic and cost-effective marketing of Victoria's Aboriginal tourism product cannot proceed until this has been established.	<ul style="list-style-type: none"> • ATV • TV • KBN 	Mid 2006
35. Appoint a high-profile public figure as an ambassador for the Victorian indigenous tourism industry who can help boost the profile of the sector to intrastate, interstate and international markets and stakeholders.	The sector needs a significantly higher profile within the broader tourism industry and in the marketplace.	<ul style="list-style-type: none"> • KBN • ATV • TV • AV 	December 2006
36. Provide financial incentive to ROC accredited operations for selected tourism marketing activities.	Operators in the mainstream tourism industry who are accredited under the Better Business Program enjoy financial incentives in selected statewide and product region marketing publications, etc	<ul style="list-style-type: none"> • TV 	Ongoing
37. Provide support and assistance to Aboriginal tourism marketing initiatives and programs, via ATV.	The small number of operators within the sector makes self-funded marketing initiatives unviable. Seed funding will be required in the short to medium term for most projects.	<ul style="list-style-type: none"> • TV • ATV membership 	Ongoing

<p>38. Promote consumer and industry confidence in Aboriginal tourism products by introducing minimum standards for participation in ATV and Tourism Victoria marketing campaigns.</p>	<p>The low industry confidence in some Aboriginal businesses is affecting the reputation of the majority of professional operators. ROC accreditation as a minimum membership requirement for ATV could help to address the issue.</p>	<ul style="list-style-type: none"> • ATV • TV • ROC 	<p>Mid 2006</p>
<p>39. Feature Aboriginal tourism product as important experiences along the State's key touring routes.</p>	<p>Tourism Australia research indicates that Aboriginal tourism does not drive destination choice or holiday itinerary planning, even for international visitors. Aboriginal tourism businesses located in regional areas are more likely to be visited if marketed as part of a broader touring experience, rather than as stand-alone product.</p>	<ul style="list-style-type: none"> • TV • product and regional committees 	<p>Ongoing</p>
<p>40. Upgrade visual imagery depicting Aboriginal tourism product and experiences in accordance with criteria determined with ATV members.</p>	<p>Imagery needs to be dynamic, engaging and reflective of Victoria's Aboriginal cultures, but at the same time needs to be culturally appropriate.</p>	<ul style="list-style-type: none"> • TV • ATV 	<p>Late 2006</p>
<p>41. Undertake research to recognise and highlight Melbourne's national and international reputation as a hub of quality indigenous Australian art.</p>	<p>Melbourne is recognised as the home of quality indigenous Australian art, a unique selling point when marketing the Victorian Aboriginal experience.</p>	<ul style="list-style-type: none"> • TV • ATV 	<p>Ongoing</p>
<p>42. Encourage recognition and awareness of education sector marketing as a building block to longer-term tourism marketing. Assist in developing links with the education sector, especially by liaising with the Department of Education</p>	<p>Most Aboriginal tourism businesses report significant patronage from education markets, yet many businesses currently consider the tourism and education markets to be quite separate.</p>	<ul style="list-style-type: none"> • ATV • TV • PV • DOE 	<p>Ongoing</p>
<p>43. In re-positioning of Victoria's Aboriginal product within the tourism sector, emphasise nature-based and/or soft adventure aspects of relevant product.</p>	<p>Research and feedback indicates that Aboriginal tourism activities have much stronger appeal to domestic markets when they are packaged as unique nature-based and eco-tourism experiences, especially involving contact with native wildlife. Minimising use of the term 'cultural' and</p>	<ul style="list-style-type: none"> • ATV • TV • PV 	<p>Ongoing</p>

	encouraging use of more appealing phrases, such as 'bush experience' or 'natural landscape tours' can be used to communicate to the consumer a range of new and unexpected experiences.		
44. Encourage Aboriginal tourism businesses to actively participate in regional marketing programs.	There is a need for greater links between regional tourism bodies and Aboriginal tourism businesses to ensure that Aboriginal tourism enjoy the synergies of a broader industry environment.	<ul style="list-style-type: none"> • Campaign committees • RTAs • TV 	Ongoing
45. Make available Tourism Victoria staff and specialist industry staff to provide specific marketing assistance and to help identify marketing priorities for the Aboriginal tourism sector.	Tourism Victoria employs a range of specialist industry development and marketing staff, who can assist operators enter new areas or improve existing business operations.	<ul style="list-style-type: none"> • TV • Aboriginal Tourism Officer 	Ongoing
46. Ensure, wherever possible, that there is recognition of Aboriginal tourism product in broader industry marketing programs.	Tourism industry publications can provide greater levels of information on Aboriginal culture and portray it as an integral part of the Victorian tourism experience.	<ul style="list-style-type: none"> • RTAs • campaign committees • TV 	Ongoing
47. Implement an annual 'trade day' for the Aboriginal tourism sector to showcase its products to the wider tourism and travel industry.	There is limited contact between the indigenous and non-indigenous sectors of the industry, resulting in low awareness of Aboriginal tourism products and, therefore, limited opportunity to integrate them into wider mainstream programs and packages.	<ul style="list-style-type: none"> • ATV • TV 	Annual
48. Authentic indigenous tourism experiences to be promoted in relevant sector-specific marketing initiatives such as food and wine, and nature-based tourism.	Aboriginal tourism operations can make a significant contribution to sector-specific marketing.	<ul style="list-style-type: none"> • TV • ATV 	Ongoing
49. Produce Indigenous park notes for each of Victoria's national parks.	Visitation to Victoria's national parks is very significant and often the connection between the land and its traditional indigenous inhabitants is not known or fully appreciated.	<ul style="list-style-type: none"> • PV 	2006
50. Utilise a standard template or system for use by	Customer satisfaction feedback is essential data to help tourism businesses to grow. Few Aboriginal	<ul style="list-style-type: none"> • KBN 	October 2006

cultural attractions (and selected distribution outlets) that records visitor feedback and visitation levels.	tourism businesses currently record patronage and formally measure satisfaction.	<ul style="list-style-type: none"> IV • ATV • CRC 	
51. Continue to work with ATV to produce a new consumer publication to profile the range and location of Aboriginal product in Victoria.	Obtaining information about Victorian Aboriginal tourism product is difficult for consumers. Cost-effective cross promotion of Aboriginal tourism product is currently hampered by the lack of such a publication, which will also help to build sector cohesiveness.	<ul style="list-style-type: none"> • TV • ATV 	Mid 2006
52. Review and upgrade web content regarding Aboriginal experiences on Tourism Victoria's consumer site and relevant industry sites. Ensure these websites are effectively linked to other relevant websites and found via major search engines.	Web content is critical as a promotional tool and must present up-to-date and current information. Much itinerary planning is based on internet searching.	<ul style="list-style-type: none"> • TV • ATV 	Early 2006
53. Establish and maintain an Aboriginal tourism product database.	Important for the industry to maintain an up to date list of all Aboriginal tourism products.	<ul style="list-style-type: none"> • TV • ATV 	Early 2006
54. Actively support market-ready Aboriginal attractions to ensure they develop and maintain a high profile in appropriate markets.	There will always be some businesses more market-ready than others, who can act as marketing flagships and case studies for the remainder of the sector.	<ul style="list-style-type: none"> • TV • KBN 	Ongoing
55. Encourage and assist operator participation in appropriate trade exhibitions, such as the Australian Tourism Exchange. Assist with the development of packaged itineraries that can be easily booked by the travel industry and that pay industry-standard commissions.	Trade shows such as ATE are an important tool for reaching the international market place once businesses are market-ready.	<ul style="list-style-type: none"> • TV • TA • ATV 	Ongoing
56. Continue to support the promotion of Victoria's Aboriginal experiences	This is a cost-effective approach to promoting Victoria's products and experiences.	<ul style="list-style-type: none"> • TV 	Ongoing

through media familiarisations and inclusion in Tourism Victoria marketing programs.			
57. Encourage operators to build links and relationships with other relevant organisations such as Tourism Victoria, MCVB, Parks Victoria, ATV etc.	There is a need for greater links between industry to maximise available opportunities.	<ul style="list-style-type: none"> • Aboriginal tourism businesses • TV 	Ongoing
58. Maximise use of Victoria's visitor information centre (VIC) network and Parks Victoria's 13 1963 service as a cost-effective way of promoting indigenous cultural experiences at a local and regional level.	A large proportion of Victorian visitors make use of VICs for information about destinations and activities en route.	<ul style="list-style-type: none"> • ATV • TV • COM • TAV • PV 	Mid 2006

Key objective 5: development

Aim: To support product and infrastructure development for the indigenous tourism sector that meets market demands and increases the range of quality experiences in Victoria.

Action	Rationale	Responsibility	Priority
59. Undertake a comprehensive 'supply analysis' of the Victorian indigenous tourism sector to complement a industry diagnostic study undertaken during 2005. This should include non-Aboriginal enterprises that are selling indigenous tourism products.	It is important to appraise all enterprises operating in the indigenous tourism sector to facilitate accurate future planning. Such a study should also look at other areas of concern and opportunities, including the issue of cultural authenticity of products. This examination may also be a precursor for expanding membership of the peak industry body.	<ul style="list-style-type: none"> • KBN • TV • AV 	June 2006
60. Ensure that all new Aboriginal tourism products demonstrate cultural/intellectual integrity and provide culturally appropriate experiences. Where appropriate, this requires consultation and permission from traditional owners.	As a fundamental requirement, tourism must respect the integrity of Aboriginal culture, as well as the rights and priorities of traditional owners. Research and anecdotal feedback has shown that consumers respond most positively to authentic indigenous product that is presented	<ul style="list-style-type: none"> • Sector-wide • ROC Coordinator • ATV • AAV 	Ongoing

	with integrity.		
61. Encourage and assist the development of Aboriginal tourism enterprises that capitalise on the high demand in the market for nature-based and soft adventure experiences. This may include use of accommodation and other infrastructure primarily established for complementary activities, such as eco lodges, spa centres etc.	Research has revealed a much higher demand by domestic markets for nature-based experiences than Aboriginal tourism product. Many indigenous enterprises are based on a strong and unique connection with and appreciation of the natural environment.	<ul style="list-style-type: none"> • TV • KBN • PV 	Ongoing
62. Identify opportunities for further development of sustainable, built Aboriginal products and experiences that highlight traditional and contemporary Aboriginal cultural tourism experiences. This process needs to include rigorous business appraisals and market testing for products, rather than be simply based on a gaps analysis. Where appropriate, consultation with traditional owners is essential.	<p>Several Aboriginal tourism development projects with significant potential are identified in Victoria's regional tourism development plans.</p> <p>New developments that deliver to the expectations and desires of selected target markets need to be encouraged during planning.</p>	<ul style="list-style-type: none"> • TV • PV • RDV 	Ongoing
63. Encourage product development and promotional activities that target domestic markets, including corporate markets. Emphasise interactive and experiential aspects of businesses, particularly to increase appeal to family markets.	Domestic markets provide the largest potential market for business growth, yet conversion rates remain low.	<ul style="list-style-type: none"> • TV • ATV 	Ongoing
64. Encourage the implementation of indigenous tourism infrastructure and product development priorities included in regional tourism development plans.	Regional tourism development plans are important planning documents for regional tourism communities and support the development of key tourism infrastructure in regional Victoria.	<ul style="list-style-type: none"> • TV 	Ongoing
65. Ensure that local government is engaged early in the process of examining the feasibility of new indigenous tourism developments.	Often the local municipality is engaged late, via the statutory process of planning and building application. The early involvement of councils in new indigenous projects is critical to their local acceptance, initial and ongoing support.	<ul style="list-style-type: none"> • Project proponents, relevant municipalities 	Ongoing
66. Assist tourism operators to identify key	It is often difficult and confusing for		Ongoing

<p>contacts regarding cultural protocols and permission to conduct tourism activities in a particular area or to tell the stories of local Aboriginal history.</p>	<p>non-indigenous people to identify who are the appropriate people or organisations to refer to when seeking advice and/or approvals.</p>	<p>AIV <ul style="list-style-type: none"> • AAF • ROC • traditional owners </p>	
<p>67. Support the development of a number of major Government funded initiatives that will contribute significantly to the Victorian indigenous tourism sector, such as:</p> <ul style="list-style-type: none"> • The Aboriginal Land and Economic Development Program • Ballarat Aboriginal Cultural Experience • Brambuk the National Park and Cultural Centre • Bunjilaka – Melbourne Museum • Early Australians Centre, Mildura. 	<p>While the development of the whole sector is the intention of this plan, the encouragement of a few key developments will provide focus and help to position Victoria within the national indigenous tourism scene.</p>	<ul style="list-style-type: none"> • TV • DIIRD • AAV • KBN • PV 	<p>2006-2007</p>

Appendix 1

Aboriginal Tourism Reference Group members

- Arts Victoria
- Aboriginal Affairs Victoria
- Parks Victoria
- Koori Business Network
- Koorie Heritage Trust
- Bunjilaka
- Aboriginal Heritage Walk
- Narana Creations
- Brambuk Aboriginal Cultural Centre
- Jumbunna Walkabout Tours
- Tjanabi Restaurant
- Tourism Victoria

References

- *'Aboriginal Tourism in Demand'* media release, Aboriginal Tour Operators newsletter, July 2001, Australian Tourist Commission
- *Public Sector Initiatives for Aboriginal Small Business Development in Tourism*, occasional paper No. 6, Buultjens, J et al, 2002, Centre for Regional Tourism Research
- *A Fairer Victoria*, Department of Premier and Cabinet, May 2005
- *National Visitor Survey*, December 2004, Bureau of Tourism Research
- *International Visitor Survey*, June 2004, Bureau of Tourism Research
- *Indigenous Partnership Strategy and Action Plan*, July 2005, Parks Victoria
- *South Australian Tourism Plan 2003-2009*, South Australian Tourism Commission
- *Tourism Research, 2001*, South Australian Tourism Commission
- *Aboriginal Tourism fact sheet*, May 2003, Tourism Victoria

- *Aboriginal Tourism Fact sheets*, 2003, Tourism New South Wales
- *Aboriginal Tour Operators*: www.aboriginaltouroperators.com.au
- *Sustainable Tourism CRC*, 2003 Indigenous Tourism www.crctourism.com.au
- *ATV*: www.seeaboriginaltourism.com
- *Aboriginal Tourism*, 2003, Western Australia Tourism Commission www.tourism.wa.gov.au

Abbreviations and contacts

ATA

Aboriginal Tourism Australia www.aboriginaltourism.com.au

ATV

Aboriginal Tourism Marketing Association www.seeaboriginaltourism.com

ATRG

Aboriginal Tourism Reference Group

BTR

Bureau of Tourism Research www.tra.australia.com

CRC

CRC for Sustainable Tourism, Melbourne www.crctourism.com.au

ITLG

Indigenous Tourism Leadership Group

KBN

Koori Business Network

ROC

Respecting Our Culture accreditation program www.rocprogram.com

TAV

Tourism Alliance Victoria www.tourismalliance.com.au

ITA

Indigenous Tourism Australia www.tourism.australia.com

IBA

Indigenous Business Australia www.iba.gov.au

Tourism Victoria Corporate www.tourismvictoria.com.au

Tourism Victoria Consumer visitvictoria.com/aboriginal

Centre for Tourism Research, NSW www.scu.edu.au/research

Appendix 2

Summary of relevant State Government agencies and policies

This plan makes reference to the lack of coordination among State Government departments and agencies with regard to Aboriginal affairs and Aboriginal tourism issues in particular. Better coordination and mechanisms to ensure that State Government speaks with one voice to the Aboriginal tourism industry is a key recommendation.

It is hoped that the recommended restructuring of Victoria's peak Aboriginal tourism marketing organisation (ATV) to create a more broad-based industry association for the sector will provide a solid forum through which various State Government agencies can liaise and consult with sector members.

The Government's major social justice policy *A Fairer Victoria: Creating Opportunity and Addressing Disadvantage*, launched in May 2005, includes a specific section on building new partnerships with indigenous Victorians' (Strategy 9).

In *A Fairer Victoria* the section 'Change the way we work with indigenous communities' (Action 9.1, page 40) acknowledges these problems with coordination:

“Change the way we work with indigenous communities to streamline Government consultations and introduce single funding agreements with indigenous organisations. These changes are being introduced to meet the concerns of Aboriginal communities about cutting red tape and reducing meeting fatigue...”

The report continues, making direct reference to the Aboriginal tourism sector:

“Support Aboriginal land initiatives with \$9.6 million over three years to develop land for use by Aboriginal communities to meet cultural, social and environmental interests. The program will promote and protect Victoria’s rich cultural heritage and involve more indigenous people in land and resource management, sustainable tourism and new business opportunities. A range of training initiatives will be included to support economic independence and employment in Aboriginal communities.” (Action 9.2, page 40).

Specific initiatives relevant to the Aboriginal tourism sector are the establishment of five Aboriginal Land and Economic Development Programs across the State during the period 2005-2008.

For the purposes of this plan, the following section outlines the key State Government agencies that impact – directly or indirectly – on the operation of Aboriginal tourism in Victoria:

1. Tourism Victoria (Department of Industry, Innovation and Regional Development)

The development of Victoria’s Aboriginal tourism industry has been part of Tourism Victoria’s industry development and marketing activities since the mid 1990s. Tourism Victoria has worked to an Aboriginal Tourism Plan in conjunction with the industry sector since 1997. The development of Aboriginal tourism is recognised as a key objective in the Victoria’s Tourism Industry Strategic Plan 2002-2006.

Since June 2005 an industry officer, indigenous tourism, has been employed. This is a joint initiative and co-funded arrangement between Tourism Victoria and the Koori Business Network. The officer works within the Product Segments and Niche Markets Unit of Tourism Victoria. Tourism Victoria’s Industry Development Unit also provides structural assistance to the industry, largely via ATV and the ATRG.

Phone 03 9653 9769

2. Koori Business Network (Department of Industry, Innovation and Regional Development)

The Koori Business Network (KBN) is the State Government’s leading body for indigenous business and was established in 1999 to develop and deliver a range of targeted programs providing support for indigenous economic growth in Victoria.

It supports indigenous businesses, artists and emerging entrepreneurs through programs and initiatives that develop existing skills and expertise into sustainable, dynamic and diverse economic businesses.

Since its establishment, KBN has developed valuable partnerships with Arts Victoria, the Department of Fisheries, the Department of Sustainability and Environment, Parks Victoria and the Department of Justice to deliver high quality programs to the Victorian indigenous community.

KBN works closely with Tourism Victoria on matters of indigenous tourism business development and co-funds the position of Industry Officer, indigenous tourism.

Phone 1300 799 526

3. Parks Victoria

Victoria's extensive system of parks and reserves is managed under the custodianship of Parks Victoria. Indigenous Australians have been intrinsically connected to the Australian continent for tens of thousands of years, along with the area now known as Victoria, including the States parks and reserves. Parks Victoria recognises this connection and acknowledges the traditional owners of these areas and the contribution of other indigenous communities and those in custodial roles.

The parks estate includes many significant indigenous sites and places, including some key tourism locations such as Gariwerd National Park, Brambuk the National Park and Cultural Centre operating as a fully Aboriginal owned and managed facility in the Grampians National Park, Dharnya Cultural Centre (Barmah State Forest) and Tower Hill Reserve. These locations and many other indigenous places facilitate interpretation tours in partnership with indigenous communities and Parks Victoria.

Parks Victoria has an Indigenous Partnerships Branch at head office and employs 50 indigenous staff across the organisation. These roles include field staff, rangers, visitor services staff and project officers throughout its large network of parks and reserves.

Parks Victoria's Indigenous Partnerships Strategy establishes directions and processes to develop strong relationships and sustainable and evolving partnerships with traditional owners and indigenous communities and to set directions and priorities to enable and support development of future co-management arrangements for parks, where appropriate.

The eight programs in the Partnership Strategy relate to the management of indigenous cultural heritage and environmental values and the development of stronger, genuine indigenous participation in all aspects of park management. Parks Victoria has committed to increasing the percentage of its permanent indigenous workforce to a minimum of seven per cent over the next few years and to maintaining this as a minimum level.

With specific reference to the Tourism industry, Parks Victoria's Indigenous Partnership Strategy commits to the following:

- To provide opportunities and work in partnership with traditional owners and indigenous communities to support the development of materials and events, facilitate tours and educational programs and support the development of appropriate indigenous tourism business enterprises and product.
- To support relevant tourism enterprises and educators to provide appropriate information, interpretation and education to park visitors and staff in indigenous cultural heritage and history that has been developed in conjunction with and approved by traditional Owners and other relevant indigenous communities.
- To ensure that tourism and educational products reflect traditional owners' and relevant indigenous communities' connection to land, water and sea, culture, spiritual associations of place and are in accord with their aspirations.
- The program's strategies for the development of indigenous business enterprises include:
 - To ensure traditional owners and other indigenous communities/people are fully involved in and approve all aspects of the development of materials, product, events and programs, including how and by whom they are delivered.
 - To provide guidance on the training, support and business requirements for indigenous businesses seeking work with Parks Victoria.
 - To identify appropriate business opportunities in parks for traditional owners and other relevant indigenous communities and assist them to develop the capacity, become 'business ready' and better able to achieve their aspirations and acquire advantage of business opportunities in parks.

- To enable and support indigenous businesses to become more aware and better prepared to quote for the provision of goods and services to Parks Victoria and explore opportunities for companies bidding for works in Parks Victoria to engage indigenous people.
- To work in partnership with Tourism Victoria, the Koori Business Network, Aboriginal Affairs Victoria, the Department of Sustainability and Environment, Department of Justice and other agencies, including federal, and importantly indigenous groups to establish and deliver best practice and ensure a whole of government approach to meeting the rights, needs and aspirations of Victoria's indigenous peoples.

Phone 13 19 63

4. Arts Victoria

The performing and visual arts play a very significant role in interpreting Victoria's Aboriginal heritage and contemporary culture to domestic and international visitors. Arts Victoria plays an indirect but important role in assisting the marketing of the State's Aboriginal culture for the tourism industry.

The position of Industry Officer, Indigenous Arts, is co-funded by Arts Victoria and the Koori Business Network.

The Indigenous Mentor Grants available through Arts Victoria are designed to assist the professional and technical development of professional artists and arts industry workers. Mentoring aspects can include curatorial skills and retail aspects of the indigenous arts industry. The development needs of individuals are teamed with an exemplary mentor in the particular field of need for a period of 12 months. The Indigenous Mentor Grants may be applicable to indigenous arts tourism enterprises, either in their ability to register as mentors, or to provide specialist training or mentoring of personnel.

The Deadly Arts Program is a partnership project between Arts Victoria and the Koori Business Network to develop Victoria's indigenous arts industry as well as to provide assistance to talented individuals. The Artists in Business component of Deadly Arts seeks to promote the development of quality, innovative products, as well as encourage professional development in business management and artistic skills. The mentoring component of Artists in Business provides grants to meet up to 80 per cent of mentoring costs, with the participant required to contribute 20 per cent of costs, either in cash or in-kind.

Other Arts Victoria grants of interest to the indigenous cultural tourism industry include the Artists in Communities and Arts Innovation programs.

The Industry Officer, Indigenous Arts, is also examining the supply, quality and marketing support for authentic Victorian indigenous souvenirs and gift items. In recognition of the fact that a major opportunity to promote Victoria's unique indigenous art to visitors is through low cost arts and crafts and other small souvenir items, the current level of supply and marketing of such items through retail and other relevant outlets will be examined. Identifying product gaps and retail impediments is also part of the process.

Phone 03 9651 5017

5. Aboriginal Affairs Victoria (Department for Victorian Communities)

Aboriginal Affairs Victoria (AAV) is the Victorian Government's central point for advice on all aspects of Aboriginal affairs in Victoria. It sits within the Department for Victorian Communities (DVC). Policy advice may relate to services provided by other State Government agencies, Commonwealth departments or to services delivered within the Aboriginal community. An important aspect of the work of Aboriginal Affairs Victoria is to promote knowledge and

understanding about Victoria's Aboriginal people within the wider community.

The objectives of Aboriginal Affairs Victoria include the promotion of the social, economic and cultural development of Victoria's Aboriginal communities, protecting and promoting the State's Aboriginal cultural heritage and improving the coordination and monitoring of the development of government policy relating to the delivery of programs and services to Victoria's Aboriginal people. AAV's activities are delivered via three branches: Planning and development, Heritage services and Portfolio services.

Grants available through AAV, which may be applicable to some Aboriginal tourism enterprises, include the Indigenous Community Capacity Building Fund, which aims to strengthen indigenous communities by addressing their own needs at a local level, and Community Support – Strengthening Communities, which provides funding to organisations, networks and partnerships to implement projects that will advance the interests of their communities.

An example of an Aboriginal Affairs Victoria funding initiative that has encouraged new tourism enterprises was the May 2005 announcement of the Aboriginal Land and Economic Development Program.

Phone 03 9208 333

Appendix 3

Overview of Victoria's indigenous tourism industry

Employment

At March 2005, it was estimated that Victoria's indigenous Tourism sector directly employed the following numbers (excluding volunteer staff):

- Full-time 49 people 50%
- Part-time 30 people 31%
- Casual 19 people 19%
- Total 98 people 100%

Location

Although Victoria's inventory of indigenous tourism product is not extensive, it is relatively well dispersed geographically and many of the businesses are located such that they could potentially capitalise on established touring patterns.

A list of indigenous tourism product follows. More than half of the product is located within two hours of Melbourne and can be reached from the capital by major routes. Those businesses are denoted by an asterix (*).

Melbourne (5)

- Koorie Heritage Trust, King Street, CBD*
- Aboriginal Heritage Walk, Royal Botanic Gardens*
- Bunjilaka – Melbourne Museum*, Nicholson Street, Carlton
- Tjanabi Restaurant*, Lygon Street, Carlton
- Melbourne's Best Tours*, Prima Court, Tullumarine

South-western region (9)

- Narana Creations, Geelong *
- Wathaurong Glass, North Geelong*

- Worn Gundidj, Tower Hill
- Budj-bim Tours, Lake Condah
- Yeerrathayarr Gallery, Port Fairy
- Eumeralla Backpackers, Yambuk
- Brambuk the National Park and Cultural Centre, Halls Gap
- Brambuk Backpackers, Halls Gap
- Ballarat Aboriginal Cultural Experience*

Northern region (2)

- Dharnya Cultural Centre, Barmah
- Bangerang Keeping Place, Shepparton

North-western region (3)

- Jumbunna Walkabout Tours, Mildura
- Miss Emily Aboriginal Art, Robinvale
- Amurra Nunagum Dreaming Gallery, Mildura

Eastern region (4)

- Bundjel Gallery, Healesville
- Burrinja Gallery, Upwey*
- Krowathunkaloong, Aboriginal Keeping Place, Bairnsdale
- Mamajee Gallery, Cabbage Tree Creek

(NOTE: map of Vic, showing location of businesses, to be inserted here)

All of Victoria's indigenous tourism product falls within the definition of 'cultural tourism'. A large percentage is engaged in the more traditional forms of public interpretation and/or presentation of visual arts. While many of these may provide more interactive programs during specified times, e.g. school holidays, group tours etc, there are relatively few operations that provide interactive experiences at all or most times.

Cultural product (11)

- Koorie Heritage Trust
- Bunjilaka – Melbourne Museum
- Burrinja Gallery
- Dharnya Cultural Centre
- Bangerang Keeping Place
- Krowathunkaloong
- Mamajee Gallery
- Narana Creations
- Wathaurong Glass
- Yeerathayarr Gallery
- Amurra Nunagum Dreaming Gallery

Interactive/experiential (10)

- Koorie Heritage Trust
- Aboriginal Heritage Walk
- Tjanabi Restaurant
- Miss Emily Aboriginal Crafts (experience limited to studio visits only)

- Melbourne's Best Tours
- Ballarat Aboriginal Cultural Experience
- Brambuk the National Park and Cultural Centre
- Jumbunna Walkabout Tours
- Budj-bim Tours
- Worn Gundidj, Tower Hill

Accommodation (2)

- Brambuk Backpackers, Halls Gap
- Eumeralla Backpackers, Yambuk

Patronage

Many of Victoria's indigenous tourism operators do not collect patronage figures, making it difficult to obtain an overall impression of visitation to the State's Aboriginal tourism attractions. However, the eight businesses that do measure patronage reveal a large variation in visitor numbers that, in many cases, is reflective of both the size and location of the business, as well as reliance on the education market.

1. Business 1 348
2. Business 2 1,500
3. Business 3 2,000
4. Business 4 16,000
5. Business 5 20,000
6. Business 6 180,000
7. Business 7 200,000
8. Business 8 467,000