A Framework for Tourism Development in Anangu Pitjantjatjara Yankunytjatjara Lands

Report commissioned by Anangu Pitjantjatjara Yankunytjatjara
Umuwa, South Australia, October 2009. Authors: Colin Koch, John Tregenza

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Foreword

Contemplating the building of a viable tourism industry for Anangu Pitjantjatjara Yankunytjatjara (APY) Lands is a complex undertaking.

The region is remote from all significant potential markets (domestic and inbound) and has negligible infrastructure in the way of visitor facilities, little resident experience in tourism development and management, very low awareness as a potential destination and only a rudimentary training and employment support base.

All of these factors are exacerbated further by health, education, cultural maintenance and land management issues prevailing in the Lands.

In addition, the Australian tourism industry at large is facing immediate and continuing downturns in volumes (particularly in international visitation but quite likely on the domestic front as well) as a result of the global financial crisis and a consequent reduction in everything from potential visitors' disposable incomes through to reductions in airline capacity and private funds available for investment in enterprise development and the accompanying infrastructure required.

Notwithstanding these factors, it is recognised that the region boasts both rare assets – notably its marrying of outstanding natural features with a level of Indigenous cultural knowledge of creation and country that cannot easily be matched by other regions in Australia or indeed the world.

There is too, an enthusiasm for tourism development at the local level rooted not just in the urgent need for economic development in the region but in the promise that tourism enterprise holds as an activity that can support rather than undermine the preservation of culture and country.

It is in this context that the authors have endeavoured to provide one practical view (there may be others worth contemplating) of how a tourism future might be forged within the current local and global environment. The focus is necessarily on garnering the resources (intellectual and otherwise) and developing suitable policies and procedures that will enable cost-effective support for planning, development and implementation.

To be successful, the actions and directions proposed within this report can best be based on a balance between issues of: environment (physical and cultural), economy (opportunities for the region and individuals) and equity (the acknowledgment and addressing of communal inputs and benefits received). Without this balance, there is a significant risk that tourism development might proceed in a manner that will not be for the long-term benefit of the region or Aṉangu tjuta: all of the people to whom the Land belongs both legally and spiritually.

It should be acknowledged that neither of the authors is an expert in tourism development. While Koch has broad experience in the national and international marketing of arts and cultural properties (including tourism product development and delivery aspects), he and Tregenza principally bring to the project an intimate knowledge of two of the major enterprises in the Lands (stores and visual art and craft) and a concomitant understanding and knowledge of the region and its people's language, culture, challenges and aspirations. It should also be noted that there is a broad scepticism amongst acknowledged tourism development specialists – notably those within government tourism agencies – that the barriers to tourism development in the Lands are currently too significant to consider APY Lands as a viable tourism destination within the current or immediately foreseeable future.

This latter point begs the question: why commission such a report at this stage? The answer – like the problem and the opportunity – is multi-faceted.

First and foremost is that even modest visitation can have dramatic local effects. Experience has shown that a group of less than twenty art-buyers can, through buying art and craft, inject as much as $30,000 into local community economies (with no significant servicing costs) during a two-night visit. This injection has a significant effect on the wellbeing and viability of individuals and their families and communities.

It is firmly believed that the development of modest tourism activity that, in the first instance, specifically targets relatively high-yield, low-volume cultural experience seekers who require little infrastructure support can provide a viable platform on which further product and infrastructure development might take place.

Tourism and the attributes that visitors are most likely to be attracted by can provide substantial motivation and support for the effective local maintenance of country and the preservation and transference of cultural knowledge. There can be no more powerful incentive for this than economic benefit. Without an understanding of how tourism might develop in the future and how that will depend on the preservation of key country and cultural assets, those assets might well be undervalued in considering alternative economic development such as mining, cattle fattening and so on.

It is desirable too that the broader population be given an understanding not only of the value of Aṉangu culture as a national cultural asset but of the challenges posed to its future and the opportunity that tourism provides to underwrite its ongoing maintenance and practice. A first step in that process might well be to demonstrate on however small a scale that there are ways in which Anangu land and knowledge can be successfully exposed to a broader audience. In so doing, Anangu gain direct benefit that is not only immediate but also brings long-term returns in the acknowledged fact that every visitor given positive exposure to the Lands becomes a long-term return visitor *and* a powerful advocate for the region and its people.

And so it is that this report seeks to ‘crash through’ some of the barriers that are seen as insurmountable and to provide the framework on which a tourism future might be envisioned and realised.

This framework provides one direction for policy, procedural and practical considerations. But its most important objective is to gain consensual support from Anangu for the way forward so that the difficult task of developing products and markets can begin in earnest and with confidence.

On the matter of markets, it is crucial that there be understanding of the approach required for success.

Currently, most thinking about tourism in the Lands conforms to a **production model:**

> “Here’s something we can do (tag-along tour, visits to country, talking with Elders, enjoying inma). We know how to do it and this is how much we need to be paid. You go and find the people to come along.”

The production model does not have the buyer as its first consideration. In many if not most cases, the price will be too high, the product won’t be quite right (maybe it’s too long an itinerary or people will refuse to go four days without a shower and a bed) and there won’t be a tour company prepared to spend time and money to sell it.

Setting aside some of the delivery issues, APY product could be developed quite rapidly in everything from bush-tucker and walking tours to inma experiences and visits to country.

The key to the right way is in a simple definition of marketing:

> Marketing is the profitable matching of a product to a demonstrated buyer need at a price that the buyer is prepared to pay.

So the model to be adopted best in the Lands is the **marketing model**:

> “Lots of people who come to Australia want to experience Aboriginal country and culture and have contact with Aboriginal people. We can do that. Let’s find out who they are, where they come from, what they want to see and do, how to talk to them and how much they can pay. Then we can offer them something at the right price and get tour operators to sell it for us.”

Previous tourism development studies and reports have concentrated on potential product and been quite exhaustive in their canvassing of possibilities. None have examined markets or market concerns in any depth.

Getting to know a market so you can respond to it is time consuming and complex and requires expert knowledge and assistance.

This is a primary reason and focus for this report and we hope that the framework suggested herein will provide the platform upon which decisions are now made with respect to the development of tourism in this most unique, precious and beautiful region.

Colin Koch
John Tregenza
October 2009

1. Report background

1.1 Commissioning

This report was commissioned by Anangu Pitjantjatjara Yankunytjatjara with the primary objective of supplementing the findings of previous reports (notably the 2007 Australian Cultural Heritage Management report referred to later). Particular needs were to: provide a consultation basis for the advancement of settling a policy framework for tourism development and management; and provide guidance on current and potential market opportunities.

The consultancy proposal described this project as Stage 1 of an overall planning project and had the following as outputs:

- *DRAFT TOURISM DEVELOPMENT POLICY (including recommendations on procedures and protocols)*
- *MARKET ANALYSIS (who will the buyers of APY tourism products be, where are they, how many of them are there, how will they hear about APY products, how much will they pay)*
- *PLANNING & IMPLEMENTATION RECOMMENDATIONS (what's the best way to take development forwards)*

The outputs for a proposed Stage 2 beyond this consultancy were:

- *Strategic Tourism Development Plan*
- *Proposed Management and Support Structure*
- *Management Budget*
- *Implementation Budget*

(Note that the proposed management and support structure has been addressed in this report.)

1.2 Consultants

The lead consultant/researcher was Kunmanara Koch. He has a broad background in arts management and business development at a senior level over three decades, including the development of Ananguku Arts & Culture Aboriginal Corporation (KU Arts) in APY Lands (2001-2007). He has much experience in specialised cultural tourism, for the Adelaide Festival (Marketing Director 1986-1994), WOMADelaide festival (co-founder/co-Director 1992-2001) and many regional areas of SA. His work was recognised in three Australian Tourism Awards for the Adelaide Festival and numerous awards for state-based events. He is a strong strategic planner and for KU Arts led the development of specialised arts and corporate tours within the Lands.

Co-consultant/researcher was John Tregenza of Kutjara Consultants who has an intimate knowledge of APY Lands and Anangu developed over thirty years. His work in developing and implementing the Mai Wiru stores policy (and many previous projects for and with Nganampa

Health) placed him in a pre- eminent position to manage the regional consultation elements of the project. John has strong and positive relationships across all Anangu communities, is fluent in Pitjantjatjara and has detailed knowledge of the region and its infrastructure.

Business consultant Robbie Davis provided research assistance in reviewing literature.

1.3 The situation

The report was prepared against a background in which economic development is a priority for the region's governing body as a means of providing more sustainable lives and communities for the residents of APY Lands through: job creation, training, enterprise development and the maintenance of cultural knowledge and land. The development of the region as a tourism destination is regarded by APY as one strategy for achieving those economic and other outcomes and is generally seen by Anangu as an appropriate and logical area of activity.

1.4 Previous reports

This report takes into account a number of other reports, notably the *APY Tourism Policy Development Report 2007*, *Australian Cultural Heritage Management* (authors Fiona Pemberton and Pat Katnich), to which this report might well be considered an extension, and "*Visitor Management Strategy and Cultural Site Protection Strategy: Anangu Pitjantjatjara Yankunytjatjara Lands*" (author Mike Last) of August 2005. Other reports are listed in the appendices.

2. Executive Summary

There have now been a number of reports produced concerning the background, methodology and prospects of tourism development in APY Lands.

As far as can be discerned, these have not led to any significant management decisions or action plans.

A deficit in existing literature is an examination of the markets that might be addressed best in terms of informing product development, destination development and the building of tourism to the Lands.

This report provides such an examination and indicates that viable markets, albeit limited in size, can be identified and targeted.

This report also confirms that the cultural and geographical assets of the region would support a high level of unique appeal being generated within those markets.

There are significant barriers to generating increased tourism (ranging from remoteness to the region's capacity to develop sustainable product).

Some operators – notably Desert Tracks – have demonstrated that a disciplined, market oriented approach to development can succeed.

The authors of this report believe that an innovative approach to immediate development can not only prepare the APY Lands for a recovery in the tourism market but capitalise on the special opportunities that reside in times during which the industry at large seeks innovative responses to difficulty.

Section 11 of this report details the principal action recommended, which is an accelerated development process and administrative mechanism.

Other principal conclusions and recommendations are as follows.

2.1 Conclusions

1. Anangu should be realistic in their expectations of tourism and accept that long lead-times apply to developing, promoting and selling new products.

2. A market-driven approach is essential for the development of sustainable tourism activity and enterprise (Rec 1).

3. There are significant barriers to be overcome in developing APY Lands tourism.

4. There is a good level of experience in hosting tours amongst a small but experienced number of Anangu. Desert Tracks in particular has developed advanced expertise over a number of years See Rec 2).

5. Communities are unanimously positive about the prospect of contributing to and enjoying the benefits of tourism development.

6. There is no strong evidence to establish whether that enthusiasm is shared by younger people Rec 3).

7. There is insufficient infrastructure in the Lands to service increased regular tourism, even at the lowest level, bush-camping. Permanent serviced campsites are required to allow reliable tour planning and delivery (Rec 4 and Rec 5).

8. Anangu have identified a broad range of attractions that could readily be developed as components of tour products. These include: visiting cave paintings, rock-holes and other sites; listening to Tjukurpa stories; bush-tucker gathering; camel rides/tours; inma

(Conclusions cont)

performance; buying art, *punu* (carving), *tjanpi* (weaving); walks through country (Rec 6).

9. The art centres represent the most significant, existing visitable infrastructure and attraction across the Lands but are inadequately equipped to service appreciable volumes of visitors (Rec 7).

10. There is little quantitative or other data on past and current tourism to the Lands (Rec 8, Rec 9).

11. There is little data available on the consumption of specific Indigenous tourism product in Australia.

12. International tourists do not have to any large degree consumption of Indigenous tour experiences as a priority in their motivation for travel.

13. Of those that do have Indigenous experiences while here, their principal countries of origin are: USA, Canada, Germany, United Kingdom and other Europe (notably the Netherlands, France and Switzerland).

14. While New Zealand provides Australia's largest inbound market, NZ visitors are low consumers of Indigenous tourism.

15. In 2007 there were 187,000 overnight visitors to the Outback region (which includes APY Lands). Only a very small (negligible) number of these visited the Lands.

16. For the next two years, the outlook for international and domestic tourism is bleak, with forecast predicting a decrease of at least 4.1% in international arrivals but less in domestic travel (1%). Some sources predict a greater decrease in domestic tourism with greatest impact likely to be in regional (and particularly remote) areas.

17. The market segment defined by Tourism Australia as "Experience Seekers" forms the primary market (both international and domestic) for development in areas such as APY Lands. Backpackers are an important niche within this segment. The segment spends more money and reaches further into regional and remote areas.

18. Schools, mature 4WD enthusiasts, fine art consumers and the culturally-interested form important target groups for APY Lands. Backpackers are significant for those communities nearer tourism gateways and the Stuart Highway. Other special-interest groups (environment, bush foods, mountain biking etc) are also of potential.

(Conclusions cont)

19. It is vital that potential product developers for and in the Lands develop appropriate relationships with distribution (sales and promotion) networks.

20. Product development requires specialised knowledge to enable product to be delivered reliably and profitably (Rec 10).

21. Regional tourism development requires centralised planning, direction and management (Rec 12, Rec 13).

22. Industry advice, participation and experience will be crucial to the effective development of APY Lands as a destination and to the building of local knowledge and capacity (Rec 14).

23. A strategic business plan is required to guide further development (Rec 15).

24. While industry forecasts suggest downturns in tourism, they are expected to plateau and start recovering in 2011. Times of industry difficulty will often reward product and destination innovation (Rec 16).

2.2 Recommendations

1. Adopt a market-driven approach to tourism development.

2. Exploit the experience and expertise of Desert Tracks by including company staff in the development process. (Subject to establishing conflict of interest protocols.)

3. Survey the attitudes of younger Anangu to tourism development and its consequences in terms of employment, training and cultural knowledge.

4. As a priority, establish at least three more permanent visitor campsites to provide tour bases across the Lands and enable tour planning and delivery to proceed with confidence.

5. Develop guidelines, protocols and agreements for shared access for all approved operators to essential infrastructure such as campsites. Where such infrastructure has been provided at the expense of a particular operator, product provider or community, such access should be provided at a reasonable, agreed fee.

6. Develop a standard template for each activity (such as visits to country, inma) that might be a component of a multi-purpose tour and which provides an overview of physical, cultural and other requirements, costs, fee structures for guides, protocols and so on.

(Recommendations cont)

7. Support the region's art centres in developing infrastructure, staffing and other resources to service increased visitation.

8. Make as a condition of visitor entry the completion of a self-administered exit survey to provide demographic, attitudinal and travel information.

9. Require all tour operators to provide regular summaries of tours, custom and Anangu participation in product delivery.

10. Product development workshops to be investigated as a means of supporting initial development of new product by Anangu.

11. Adopt as the guiding framework for tourism policy the principals:

    Principle 1

    That tourism development should be used as a vehicle to maximise the overall economic, cultural, community and social development of APY Lands and all Anangu, but in a way that maximises direct benefits to Anangu through local enterprise development, employment, training and skills development, earned income, land management and cultural maintenance.

    Principle 2

    That all infrastructure (buildings, toilets etc) developed to service tourism needs should be locally owned (not owned by external tour operators).

    Principle 3

    That no tour external operator be granted exclusive visiting rights to any facility or attraction that is communally owned under the Act. (Competition between operators is what will get the best money for Anangu.)

    Principle 4

    That Anangu involvement in tour delivery be maximised and that tourism development is used where possible as a base for building locally owned and operated enterprise.

    Principle 5

    That tourism products should be consistent with and promote appropriate cultural practices, knowledge and protocols.

    Principle 6

    That where possible, tourism products should be complementary and non-competing so that everyone is promoting their products together.

    Principle 7

    That preference is given to low volume/high yield tourism development as a means of minimising environmental impacts and maximising returns to Anangu.

12. Establish a Tourism Development Sub-Committee of APY Executive.

13. Establish a Tourism Office and create a Tourism Officer position at Umuwa, ideally within the Land Management Unit.

(Recommendations cont)

14. Establish a Tourism Development Advisory Committee comprised of identified external bodies and individuals with appropriate expertise.

15. Commit to the development of a Strategic Business Plan for tourism.

16. Develop a “fast-track” approach to development by using a Tourism Sub-Committee and Tourism Advisory Committee to develop pilot products and strategies to launch APY Lands as new destination in 2010 towards 2011 as a focus year for generating increased visitation with existing and new operators and products.

3. Methodology

3.1 Policy development

John Tregenza (of Kutjara Consultants) led the consultation with Anangu and APY communities to determine the most desirable policy and management frameworks for tourism development.

The consultative process began with a series of meetings between the consultants and the APY Executive and the APY administrative staff to determine the scope of the work, to identify the key stakeholders to be consulted, to recommend and recruit an Anangu malpa for the field consultant, John Tregenza, and for the Executive to give direction to the consultants in regards to the requirements of the Executive.

It was clear from these discussions that the APY Executive was keen to develop tourism on the Lands and was seeking guidelines for implementing a practical framework for achieving this. It was also clear that the APY executive believe that, as the Land holding body, they have primary responsibility for the regional development of tourism on the Lands.

Consultation took place on the APY Lands over a three-week period between July and September 2008 and took the form of one-on-one interviews and focus group interviews.

The field consultant travelled to all the APY communities and homelands with the appointed malpa, Kunmanara Shilling, and held informal and formal discussions with a wide range of Anangu residents. All the discussions were held in Pitjantjatjara and at locations of the respondents' choice.

Formal meetings were conducted with:

- Community Council at Amata
- Community meetings at Iwantja, Kaltjiti, Mimili, Kanpi, Nyapari, Kalka, Pipalyatjara and Watarru
- Those present at an Anilalya Homelands meeting
- PY Media
- Chairperson, Pukatja Council
- Frank Young at Watarru
- Lee Brady (representing Desert Tracks)
- Art Centre Managers: Helen Johnson (Iwantja Arts & Crafts, Indulkana), Toni Galer (Mimili Maku Arts), Beverley Peacock (Kaltjiti Arts & Crafts), Debra Myers (Ernabella Arts), Skye O'Mara (Tjala Arts, Amata), Amanda Dent (Tjungu Palya, servicing Nyapari, Kanpi and Watarru communities) and Bronwyn Taylor (Ninuku Arts, Kalka and Pipalyatjara).
- Dr Diana James (Desert Tracks)
- Ken Newman, General Manager Anangu Pitjantjatjara Yankunytjatjara
- Rodney Edwards, Co-ordinator, APY land Management
- Principal, Mimili School

- Liz Tregenza, General Manager A<u>n</u>anguku Arts & Culture Aboriginal Corporation

3.2 Market Audit

Kunmanara Koch led this part of the project, which was largely desk-based. Principal activities were:

- A literature review (existing reports and documents relating to APY tourism, notably *APY Tourism Development Report 2007*, Pemberton F and Katnich P for Australian Cultural Heritage Management Pty Ltd and *Visitor Management Strategy and Cultural Site Protection Strategy*, 2005, Mike Last)
- Review and analysis of Tourism Australia and South Australian Tourism Commission market profiles, statistical reports and forecasts
- Review of miscellaneous papers produced by Desert Knowledge Cooperative Research Centre
- Consultation with staff of the South Australian Tourism Commission
- Consultation with current operators (including Desert Tracks, Banksia Tours, Diverse Travel)
- Report preparation

3.3 ACHM Study

This report and the work behind it took into close consideration the evidence, findings and recommendations contained in the *APY Tourism Development Report 2007* (op cit), which stands as the most comprehensive tourism development report for APY Lands to date. So thorough was the report's review and analysis of the history and (then current but still largely prevailing) conditions that the authors of this report have not revisited all areas and issues that it discussed.

One limitation in the scope of the report, however, was that it did not directly canvass the existing and potential markets for potential APY Lands' tour products. References to market information were primarily made as reports from tour operators.

For a region where there is not a high level of existing activity (with the exception of Desert Tracks' programs) nor general regional visitation that might feasibly be exploited (as is the case at Uluru or Kakadu for example), understanding markets and their potential is vital.

That said, the *APY Tourism Development Report 2007* is a seminal document and one that should be read in close conjunction with this report. Where appropriate, references to particular items in the former report are made where detailed reference is thought useful. Grateful acknowledgment is made to the authors of that document and to all who contributed to it.

4. Current and Potential Tourism Activity in the Lands

4.1 Community activity

There are a number of different prevailing models for current Aṉangu tourism businesses.

These include:

- Family Businesses (eg the Young family's 'tag along tour' business previously conducted at Watarru
- Small-group Community Stays (where for example a small group of tourists might stay in a community for two or so nights and experience a bush-tucker walk, a *Tjukurpa* walk visiting a sacred site with Traditional owners or *inma* ceremonial dancing
- Larger-group Community Stays (bus tours and camps such as those at Nyapari hosted by the Stevens family)
- Ecotourism Tours (such as those operated by Desert Tracks
- Combined Tours (such as those offered by Desert Tracks and based at Angatja and visiting Cave Hill and the Ngarutjara Walk at Mt Woodroffe)
- School Tours (such as those offered to visiting school groups by Mimili Maku and Desert Tracks – school groups regularly visit other communities eg Kaltjiti)

The following additional information was gathered from consultation in communities and is presented community by community.

4.1.1 Watarru

At the time of consultation Frank Young was operating Tag Along Tours as a family undertaking. He said that the family wanted to keep this as a family operation. Melbourne-based lawyer Graham Chapman co-ordinates visits and promotes the tours. It is understood that the Youngs are paid perhaps $600 or $700 per vehicle and that this money is distributed to family. The tour typically attracts around ten vehicles and includes five nights travelling in the Lands. Mr Young meets the parties off the Lands and conducts an orientation and briefing, then travels with them until they leave. The group is in CB radio contact at all times. He has developed 'postcards' of places visited which are sold to participants. Mr Young supervises all photography by visitors.

The tour bush-camps and visits sites such as rock-holes and caves and experiences bush-tucker gathering, stories of the country and an introduction to ceremony with *tjitji inma*. Visitors supply all their own needs but buy perishables and fuel locally (Watarru store). Portable or bush toilets are used.

Mr Young negotiates permission and payment with communities and Traditional Owners for visiting other areas (which may include Mimili, Cave Hill and Alpara).

While wishing to remain independent, Mr Young supported the notion of other families and communities getting into tourism and is willing to collaborate with other potential operations, eg Cave Hill and Desert Tracks and sites such as Ulkiya and Alpara. He had some reservations about Watarru Community's capacity to manage the business he has established.

4.1.2 Pipalyatjara

Community members advised that there is currently no significant tourism to that area. One interviewee said that that visitors always want to see the chrysoprase mines and the community is suspicious about visitors' motivation in this context. However, the community expressed interest in developing tourism enterprises in the future as a means of generating income.

There are many unoccupied homelands near the community and some of these have visitor infrastructure in place (toilets, showers, solar power, shelters etc) although by now they may need some repairs and maintenance.

4.1.3 Kalka

Kalka community has experienced unregulated visitation from operators and other passers-by. Community members said that *'Everyone wants to camp in Tilun Tilun Creek (near a sacred site) but no-one will pay'.*

The community wants to develop community tourism as an income stream for cultural maintenance and to provide employment for young people. Identified tourism activities included Anangu sites (rock-holes, country etc), cave paintings, collecting bush tucker, the possibility of hearing Anangu Tjukurpa, camping out, tjitji and adult inma, visiting the art centre and purchasing paintings and punu and visiting the community store for shopping.

The community supports the concept of an APY regional tourism office to co-ordinate and regulate tourism and assist them to develop their local tourism package. The community went through a costing exercise: $400/day for bush tucker guides; $200 for adult dancers ($50 for tjitji); $500/day for Elders telling stories and co-ordinating activities; $50/night/person for camping.

4.1.4 Nyapari

At Nyapari there is no organised tourism at present except for passing trade. No current returns flow to the community although people said they have been thinking about tourism for a long time.

Desert Tracks is located at nearby Angatja Homeland, but families at Nyapari would like to develop a separate Nyapari product.

The Stevens family want to develop an enterprise separate from the community including the Piltati and Nyapari areas. Nyapari community supports the concept of an APY regional tourism office to co-ordinate and regulate tourism and assist them to develop their local tourism product.

They have ideas about where to camp but need funding to develop the site and construct necessary infrastructure. Community members recognise the need for an organised workforce to provide firewood collection, clean-up, guides and young people to perform roles similar to those of rangers at Uluru.

They believe they can control the actions of tourists including access to Lands, photography and so on.

The community identified potential activities: visits to Anangu sites (rock-holes, country etc) and cave paintings; collecting bush tucker; hearing Anangu Tjukurpa, camping out, tjitji and adult *inma* and tourists making *punu* to take away with them. Nyapari community members believe they can sustain a 3-4 day itinerary for tourists.

4.1.5 Amata

Tourism in the Amata area is largely managed by Desert Tracks and includes visits to Cave Hill and Angatja (and then to Ngarutjara/Mt Woodroffe).

Tourists also access the community for stores and fuel and visit the Tjala Arts centre for buying paintings.

Desert Tracks is currently managed by Brett Graham and staffed by three non-Aboriginal staff (driver, cook and guide). Anangu participate on site and are paid by the company. Desert Tracks' Anangu Directors did not know or were reluctant to disclose the amount of money paid to Anangu workers. (Note: subsequent consultation with Desert Tracks revealed that Anangu assisting or providing content to tours are paid in the range $150-$250 per day ($50 per day for children), depending on their input and community position.)

Desert Tracks' directors present at the consultation (Lee and Leah Brady) stated that they believe that Desert Tracks should provide the regional tourism office and manage all tourism because they have the experience. Stanley Douglas (Cave Hill) stated that he had no problem with other groups visiting Cave Hill on a commercial basis.

4.1.6 Pukatja

At Pukatja the Chairman stated that they did not need an APY tourism office because Pukatja is developing tourism enterprises in conjunction with Uniting Care Wesley and the University of Adelaide. All developments at Pukatja have to go through the Pukatja Council.

The consultant (J Tregenza) was approached independently by Traditional Owners of nearby homelands, who expressed an interest in developing a family based and controlled tourism enterprise separate from Pukatja.
These people supported a regional tourism office to assist Anangu families to develop and promote their product.

4.1.7 Kaltjiti (Fregon)

At Kaltjiti there is currently only passing traffic and some cultural training courses at Tjilpi Robin's homeland. The Community Chairperson stated that all tourism developments had to go through the Community Council and that it should not go through APY.

The consultant was approached independently by three different family groups who want to develop tourism ventures separately from Council and other local control. One of these includes camel and horse trips, either day trips or overnight (such as those offered at Ross River). These families are prepared to work together to develop a product or variations of a product that they can all share in.
Traditional Owners emphasised the need to educate their own young people in their culture and saw tourism as a vehicle to do this as well as earn money.

All but the Chairman supported an APY tourism office to assist them to develop their ideas and promote their product.

Community members state that there is already a site with toilets and showers available (Deep Well #2). School visitor groups already use it.

4.1.8 Mimili

Currently the Community Council co-ordinates visits, mainly by school groups and some bus companies to the area, with visitors using camp facilities at Victory Well. Those community members who are involved as guides, *inma* dancers and cultural interpreters feel that they are not adequately recompensed. They believe there is an account held by the community which has funds and from which they are still owed money for their work. They do not know how much schools and others are charged but state that they only get *tjitji* money for their input.

Community members want to have family based enterprises similar to those outlined by other families on the Lands. Community members support the concept of an APY regional tourism office to co-ordinate and regulate tourism and assist them to develop their local tourism package.

Some community members stated that they wished to start again with family operated tourism, such tourism being family managed with family income being an objective for this. They stated that they are experienced teachers and tourist guides but are being underpaid by the Community Council, school and others.

Subsequent to the consultation, Desert Tracks has advised the consultants that the company has been approached by the Mimili Community to manage the Victory Well campsite and associated tourism operations.

4.1.9 Indulkana

At Indulkana the only tourism currently is from tourists diverting from the Stuart Highway to visit Iwantja Arts and Crafts.

The community supports the concept of an APY regional tourism office to co-ordinate and regulate tourism and assist them to develop their local tourism package.

Members expressed a desire to see family based tourism enterprises developed. The Singer family at Railway Bore wants to develop traditional tours to Anangu sites (rock-holes, country etc), collect bush tucker, hear Anangu Tjukurpa, camp out and experience tjitji and adult *inma*. The Singer family is also interested in a commercial roadhouse on the Highway. (These were mentioned as two different and not necessarily interdependent concepts.)

4.2 Current and potential operators

An overview of current and recent operators is given at section 7.1. Desert Tracks (which is Anangu owned) stands out as the most consistent developer and operator of APY Lands tours within the past decade, not just for its performance but for its position as the only operator to have developed an ongoing, viable market presence and a stable position within the industry. While the company is relatively small in scale, it offers a good example of tourism enterprise development for the Lands.

The majority of other operators are much smaller in scale (in terms of the volume of visitors they generate) and operate on a demand basis, generally working directly with their customers rather than through accredited agents or wholesalers.

Of the 257,000 visitors to the region reported in 2007 (see section 7.1.2.4), it is estimated that fewer than 1,000 visited the APY Lands, with that total representing private individuals on independent itineraries (many visiting friends and relatives), those participating in organised tours (notably those offered by Desert Tracks) and short-duration visitors to Iwantja Arts & Crafts at Indulkana.

With regard to potential operators that might be part of tourism product development, promotion and delivery (particularly coach and tour operators specialising in “bush” or Outback tours), almost any discussion is met with great enthusiasm for “opening up” the region and for creating new products. This enthusiasm is just as consistently followed by discussion of the barriers to entering and sustaining the market (see following section).

That said, the willingness of operators such as (but not limited to) Diverse Travel, Wayward Bus, Banksia Tours, Diamantina Tours, Wrightsair, Opal Air and others to consider new product development provides some confidence in the prospect of being able to generate the operational support needed to deliver those locally developed tours.

Anangu themselves have a good understanding of the range of attractions that the APY Lands offer and – amongst many Elders and Traditional Owners if not young people – an enthusiasm for and vision of how those attractions might be exploited in experience-based tour packages. Accompanying this however, is a generally low level of understanding of the steps required to develop and deliver such packages.

4.3 Barriers to Product Development and Delivery

From an industry point of view, the principal barriers are likely to be:

- Low awareness of the APY Lands as a destination
- Little infrastructure to support overnight visits (market is severely limited when tent and swag accommodation is the standard)
- No readily accessible toilet or shower facilities
- No “off the shelf” destination based products and experiences (other than art centres) to readily incorporate in tour itineraries
- No ready access to a pool of interpreters and guides and no agreed scale of fees for local involvement
- No discernible “gatekeeper” with whom to liaise in developing product
- No discernible policy or procedures regulating and guiding tour operators and product development
- Seasonal nature of the region and weather extremes
- Variable road conditions
- Variable cultural environment that might disrupt tours or close routes
- No discernible local facilities for provisioning tours or providing assistance in emergent circumstances
- Remoteness of destination and relatively long travel times (and associated operating and customer cost implications) needed for travel to and from the Lands relative to major tourism gateways
- Distribution (sales) lead times and reliability of Lands component of product delivery

Various discussions held by author K. Koch with SA Tourism Commission staff during the development of KU Arts’ art centre tours confirm that the SATC sees these barriers are significant. In the ACHM report (op cit, section 4.5.1), the then Group Manager Tourism Development Mike Geddes suggested that “community (capacity) building” was a desirable focus and that elements such as “ongoing staff presence (and) consistent delivery of the experience” were vital to building a sustainable tourism business.

From a local (Anangu) product developers’ view, the major barriers are likely to be:

- No readily accessible local expertise to provide advice and guidance
- No readily available facilities for visitor camping or accommodation
- No funding to develop necessary infrastructure
- No regionally agreed policies or procedures to inform product development
- Little experience in tourism and business operations
- No regional co-ordination of information or overall development
- Little knowledge of the industry, market and development, pricing, promotion and operational strategies
- Decreasing knowledge base (country and culture) amongst young people
- Little interest or capacity within local community administration and management to assist with the development and support of Anangu enterprises, including tourism ventures

5. Infrastructure

5.1 Current Infrastructure

A full audit of current infrastructure able to accommodate and service visitors to the Lands was outside the scope of this report.

However, the following overview provides solid evidence that current infrastructure is minimal:

Mimili
Campsites: Victory Well (well located and serviced by two pit toilets and water-tank).
Community: store, fuel, no public toilets
Art Centre: basic facilities in need of extension and renovation to cater for day visitors

Pukatja
Campsites: no serviced campsite (but vacant homeland facilities available from time to time)
Visitor Units: three units each with one double bed and two double bunks (toilet and shower facilities detached)
Community: store, fuel, garage, no public toilets
Art Centre: reasonable facilities for day visitors

Indulkana
Campsites: no serviced sites
Community: store, fuel, no public toilets
Art Centre: fair facilities for day visitors

Fregon
Campsites: no serviced sites close to community, serviced site at Deep Well #2
Community: store, fuel, no public toilets
Art Centre: fair facilities for day visitors

Amata
Campsites: no serviced sites close to community, serviced site at Angatja (operated by Desert Tracks), safari-tent accommodation proposed for Cave Hill (Desert Tracks)
Community: store, fuel, no public toilets
Art Centre: new art centre will have good facilities for day visitors

Nyapari
Campsites: no serviced sites, Murputja school facilities available on ad hoc basis for negotiated use
Community: no store, fuel, no public toilets
Art Centre: no facilities for day visitors

Kanpi
Campsites: no serviced sites (Murputja school as above)
Community: store, fuel
Art centre: no facilities for visitors

Kalka
Campsites: no serviced sites (Tilun Tilun Creek is used by many non-local visitors as a camping area without permission from the Traditional Owners)
Community: store, no fuel, no public toilets
Art Centre: basic facilities for day visitors, extensions/renovations required

Pipalyatjara
Campsites: no serviced sites
Community: store, fuel
Art Centre: n/a

Watarru
Campsites: serviced site adjacent to community but in need of repairs and maintenance
Community: store, fuel
Art Centre: n/a

Umuwa
Campsites: no serviced sites
Town: no store, no fuel, no public toilets
Visitors Quarters: 6 units (double and single sleeping platform in each) with shared kitchen and wet facilities

Unoccupied Homelands
There are a number of unoccupied homeland dwellings throughout the Lands – many serviced by power and water plant in varying states of maintenance – that might be considered as potential infrastructure. Homelands at Ulkiya and Itjinpiri are known to have been used occasionally to accommodate visitors. There are up to ten unoccupied homelands west of Amata that may be available for visitor stay following negotiations with the Traditional Owners.

Roads
All roads are unsealed (other than within communities). While generally well maintained and routed, major connecting roads are subject to rapid deterioration and can be impassable after wet weather. Signage is now adequate for visitor navigation between major communities.

Emergency and Service Infrastructure
There are no publicly available clinics or dispensaries. Emergency medical or trauma treatment relies upon local Nganampa Health staff, with evacuation via the RFDS using community airstrips (limited to Amata and Fregon at night). There are no comprehensively equipped

vehicle repair, maintenance, spare parts or towing services and the nearest RAA contractor is at Marla. Mobile telephone range is limited to Ernabella. There are no food outlets (provisions) beyond community stores and no cafes or other sit-down meal outlets.

Art Centres

The existing art centres currently provide the most significant (if not only) “visitable” infrastructure in terms of region-wide facilities. The art centres also provide motivation for visitation (and direct returns to artists as community members) through the high-value art and value-for-money craft products they offer for sale. As described above, their facilities for visitors (showrooms, toilets etc) range from inadequate to reasonable. They are also not staffed sufficiently well to service even moderate visitor traffic but in most cases do so, despite the demands that having to act as quasi information centres also place upon current staff. Consultation with art centres in the preparation of this report revealed a growing reluctance (born of limited resources and time) to service increased visitor traffic, despite the potential economic benefits of that traffic.

Evidence of this reluctance is based on staff statements that: groups of tourists wandering through art centres, even in a controlled manner, are a distraction to the artists and that the quality of their work is affected; high-value art already has a secure market and will be sold at the best price and the medium-value and tourist art products which the Art Centres wish to shift is rarely purchased by fly-in buyers; commercial buyers infiltrate tourist groups and purchase paintings to the detriment of the viability of the established retail arrangements: and few art centres have appropriate retail showrooms or galleries to manage retail activities in-house.

More importantly, according to the major high-value art producing art centres, the sale of high-value art on site undermines the commercial arrangements for the showing and sale of these art works. The relationships between the art centres and the commercial galleries have a major aim of developing the status and profile of emerging artists. On site sale to tourists of paintings that are scheduled for gallery exhibitions undermines their value and only benefits the buyer who may purchase a work well below its market value.

Notwithstanding these issues, most art centres and the artists’ regional organisation, Anangu Arts, are committed to selling art works for the benefit of their members. With the impending construction of new art centre buildings with designated retail facilities and the training of Anangu workers to operate the retail ‘shop-fronts to the centres the potential for this activity will be increased.

The consultants are confident that, with appropriate discussions and negotiations between future Anangu tour operators, the proposed Anangu Tourism Office and the art centres, a way to include positive and mutually beneficial involvement of the centres within a tourism product will be possible.

5.2 Desirable infrastructure

A detailed discussion of the infrastructure required to service tourism development is entirely dependent on the style of development contemplated and the specific markets to be targeted.

For the purposes of this report, only basic infrastructure needs will be explored as the platform for: the better servicing of current (and albeit limited) visitor traffic; and the expanded promotion (and possible extension) of bush-camp, vehicle based products and traffic.

An immediate limiting factor for expanding tailored individual, coach and tag-along tours (and the Anangu content that can be developed to benefit from those tours) is the lack of permanent campsites. At present, tours require individual negotiation with communities (itself limited by their being no publicly available information about whom to negotiate with) to secure temporary sites. Victory Well provides the only community-based campsite at time of writing.

In essence, each community could receive short to mid-term benefit by creating a permanent campsite able to accommodate visitors, preferably with toilet and shower facilities and access to fresh water. (To a certain extent, the concentration of visitor traffic on available facilities will favour those communities to provide those facilities first.)

To allow the development of 3-5 night itineraries that enable operators to have full range over the Lands without having to return to the same base-camp each night, expansion of current activity requires at very least the development of three and preferably four permanent camp facilities: one in the East (and Victory Well could readily meet this need), one central (around Umuwa, Fregon or Amata), one in the West (Nyapari, Kanpi or Kalka) and one in the south-west (Watarru).

It is interesting to note that Anangu owned Desert Tracks has provided its own base infrastructure at Angatja to good effect and is developing plans for additional overnight facilities at Cave Hill. The company is also contemplating further infrastructure development at Victory Well should it accept the Mimili community's invitation to assume management of that site.

With minimal infrastructure available, it is vital that effective guidelines and protocols be established for the sharing (between operators and tour providers) of access to assets such as campsites.

It should be noted that considerable work has already been done to identify and outline the issues and principles involved in developing tourism infrastructure on the APY Lands. Mike Last in "Tourism 1" (September 1995) and later in his "Visitor Management Strategy And Cultural Site Protection Strategy" (op cit) has specified the land management needs for tourism infrastructure development on the APY Lands. The consultants fully support these recommendations and believe the need to comply with these is even more necessary in 2009.

The work by Mike Last was produced for and is held by the Land Management Unit of the APY Executive. It is critical that tourism infrastructure development follow the guidelines and principles and is a major reason for this report's later recommendation that the Land Management Unit be a key contributor to the process of assisting Anangu to develop their local tourism products.

6. Ananguku Tourism Aspirations, Identified Issues and Opportunities

6.1 Aspirations

(To be read in conjunction with section 5.6 of the ACHM Report [op cit]. Note in particular the reference therein to a 1994 proposal at Kaltjiti for the establishment of a camel tour operation. The emergence of the same or similar proposal during 2009 consultation demonstrates the slow manner in which the tourism issue has been addressed.)

In this part of the report it is particularly important to note that those Anangu attending community meetings to discuss tourism development issues with the consultant (J Tregenza) were in the older age brackets, with most being over 50 years of age. It might well be that the aspirations and concerns of the older may not be shared by younger generations, particularly those in the 20-35 year-old bracket who would not only be the major targets of the longer-term training and employment objectives of tourism development, but would also be those expected to represent cultural knowledge to visitors in the future. Reference is made within the ACHM Report (op cit, section 4.6.2 ref Ian Liddy remarks) to a perceived lack of interest in tourism amongst young people. For this reason, it is recommended that there be a further pilot study to test attitudinal responses with a representative group of young people.

However, consultation conducted as part of this study confirmed that older Anangu and those in community leadership positions are generally positive about the potential for tourism to bring income into the region and support Anangu aims of creating employment for young people, supporting the intergenerational transmission of culture, helping Anangu to look after the land, and increasing the understanding and appreciation of Anangu culture in the wider community.

Those Anangu community members who have already had some involvement in tourism acknowledge that tourism is hard work.

6.2 Issues Identified by Anangu during consultation

During community consultations the following issues were raised by Anangu:

- Needs to be an overall tourism plan
- Plan needs to talk about how many people, cars and buses (and planes) will come
- Need to define where tourists can (and can't) go
- Need to come up with a set of rules
- Photography policy required
- Designated campsites need to be made
- Campsites need toilets and showers, water, rubbish removal and cleaning/maintenance
- Visitors need to pay for camping
- Who will be regional *mayatja* (manager) for tourism?
- Who will be *mayatja* in communities? Community Council? Family? Elders?
- How much money will tourism bring?
- Everyone involved needs to paid: Traditional Owners, inma dancers, guides for Tjukurpa and bush-tucker
- Ownership always resides with community and Traditional Owners
- Who will visit? Children/ Old people? How many companies?
- How many visits (tours) will there be? What times of year?
- Things that could affect tours (funerals, business, rain)

Anangu respondents presented many ideas and recommendations to address all these issues. There are some differing opinions about the best resolution to these problems but there is general agreement across the Lands that all these issues can be resolved locally and regionally for the benefit of Anangu and visitors alike.

What is needed to assist in identifying and implementing strategies to resolve them is a support system for Anangu. In all communities there was strong support for the establishment of a regional, Anangu controlled organisation or body to assist each local group to resolve these issues in the way each local community desires. While there may be local variations in approach to resolution of these issues all agree that they should fit within a regional policy framework.

Anangu support the development of locally owned and controlled tourism ventures. Anangu referred to the economic benefits as well as the fact that working in local tourism is generally an enjoyable experience, facilitates visits to home country and cultural family sites of importance, involves many members of the community and family, and, assists older Anangu in the transference of information to the younger generations and the maintenance of traditional bush skills and cultural knowledge.

6.3 Opportunities Identified by Anangu during consultation

Products: Visiting cave paintings, rock-holes and other sites

Listening to Tjukurpa stories
Bush-tucker gathering
Camel rides/tours
Inma
Buying art, *punu* (carving), *tjanpi* (weaving)
Walking through country

Outcomes: Income
Training
Jobs

7. Market Analysis

7.1 Market for current or recent products

The most significant and longest established operator is Desert Tracks, which is Anangu owned and operated by Discovery Eco Tours. Its products are principally targeted at secondary school student populations, notably in Sydney and Melbourne, and are offered as ‘immersion’ field trips related to cultural studies curricula. The company is enjoying success in this sector, with an estimated 280-300 passengers booked for the 2009 season. Marketing is direct, utilising existing relationships, with wholesale support from another specialist company.

Desert Tracks also operates day tours to Cave Hill from Yulara. These capitalise on existing traffic to the Yulara Resort. Marketing responsibility resides with the Resort and the larger proportion of visitors is international in origin.

Desert Tracks operate occasional tours to Mt Woodroffe and have one such tour currently scheduled for 2009.

The company terminated its management agreement with Discovery Eco Tours in March 2009 and will now operate and market under its own banner, with Brett Graham as its general manager.

In 2009/10 Desert Tracks is expanding its core product range and Cave Hill infrastructure to provide overnight stays in ‘safari-tent’ style accommodation. A helipad will also be installed to allow fly-in-fly-out visits (or one-way by air, one-way by road). These one-night stays will be targeted at the high end of the market but initially will be low volume while the product and its distribution are established.

Schools have also provided a market for ‘community-based’ camping tours, notably at Mimili and Fregon. The majority of schools visiting do so on a reasonably regular basis and are built on relationships with particular APY schools, some of which have reciprocal visits to their ‘sister’ schools. The annual volume of visitation to the Lands by these groups is estimated to be in the range 150-250 people.

Watarru ‘tag-along’ tours have been targeted at markets identified by third parties and capitalise primarily on 4WD clubs and networks. It is estimated that current demand is in the order of 40-100 passengers per annum, although this demand may not be serviced in current community circumstances.

Diverse Travel – based in Adelaide – offers special, tailor-made itineraries for groups and individuals on an as requested basis. Most such tours have had visits to art centres as their focus. While numbers have been low, the principal source of bookings has been the USA, with an emphasis on academics taking summer holidays in Australia with their families.

Diamantina Tours has no current itineraries on offer for the Lands but typically used to bring two tours of around 20 passengers through the Lands, with Mt Woodroffe as the principal destination. Diamantina relies principally on word-of-mouth and internet promotion.

Beadell Tours are currently offering one Lands-inclusive, tag-along tour for 2009 (July). It is likely that it would attract a maximum of 20 customers (no information available from the operator) and be drawn from the 4WD market.

Iwantja Arts & Crafts at Indulkana has been offering for several years day permits for visitors diverting from the Stuart Highway. Traffic is principally groups brought by Groovy Grape (twice weekly) and Wayward Bus (sometimes fortnightly), with around twenty visitors each time. These visitors are principally young backpackers and the visit is part of standard itineraries established by direct contact with the companies. There is more modest but growing visitation by individuals, notably from the ‘grey nomads’ market segment but occasionally from young families. On average, Iwantja receives around 40 visitors per week, which generates around 10% of their annual art and craft sales.

By negotiation with communities, Traditional Owners and others, the Adelaide-based corporate group SA Great conducts an annual tour to art centres in the Lands using chartered transport and local guides arranged with communities when staying in or visiting communities. This group is typically 18 persons, who are drawn from around 40 people who have become regular though not annual participants. This group tour was originally established by Ku Arts.

Other specialist groups – such as SA Museum, Earthwatch and art collectors – have arranged special tours from time to time but these are ad hoc and are likely to have involved from 10-20 people each. Nevertheless, they provide a pointer to environmental and cultural niche market opportunities.

Wrightsair of William Creek (and other air charter companies from time to time) offers art centre tours on a demand basis.

The ACHM report pointed to a number of other operators who have brought tours to the Lands but there is no evidence of itineraries for 2009.

The APY Annual Report 2007/08 showed that 635 visitor permits were issued in that year, a marginal decline on the previous year and. It is assumed that the majority of these permits were issued to visitors *not* participating in organised tours.

To allow the development of a database on visitor motivations and activities, APY should require as a condition of granting entry permits:

- All visitors visiting the Lands for holiday or leisure purposes to complete an exit survey to gather information on their place of origin, places visited, method of transport to and from the Lands, how they heard about the Lands and what motivated their decision to travel and so on.
- All tour operators to give a summary of the tour content, what Anangu involvement there was and whether that participation was paid or unpaid.

7.2 The Indigenous Tourism Market

In recent years there has been a welcome inclusion of Indigenous Tourism as a special interest area within tourism agency and government data collection, analysis and planning.

A number of key reports on international visitors' participation in Indigenous tourism have been produced by Tourism Australia, notably the *Segments Insight Pack, Aboriginal Tourism* of 2003[1].

(Before visiting some of that information, it should be said that there remains a paucity of information on the consumption of Aboriginal product in the areas of this report's prime interest: remote area tourism. As will be seen in the following information, there is a relatively high level of interest amongst many international visitors in Indigenous culture and a high level of interest in experiencing that culture. However, it is most unlikely that that interest is converted to experience in the majority of cases.)

[1] *Segments Insight Pack, Market Research Intelligence on Aboriginal Tourism, Australian Tourist Commission 2003.* A copy of the report is provided as an Appendix to allow further reading.

7.2.1 International Visitor Survey

The International Visitor Survey for the year ended June 30 2002 (the survey on which much of the Insight Pack is based) showed the following:

INTERNATIONAL VISITORS: DECISION-MAKING AND CONSUMPTION OF ABORIGINAL EXPERIENCES

Country of Origin	**% of visitors whose decision to visit Australia was influenced by the opportunity to experience Aboriginal culture**	**% of visitors who experienced Aboriginal art/craft and cultural displays**	**% of visitors who visited an Aboriginal site or community**
New Zealand	1	4	1
Japan	2	8	3
China	6	4	2
USA	4	16	8
Canada	4	20	10
United Kingdom	6	18	11
Germany	18	32	19
Other Europe	9	20	13

These figures suggest that the opportunity for general visitors to experience Aboriginal culture is not a major motivational factor in the decision to visit Australia. More interesting is that the survey shows that once here, visitors are more amenable to such experiences, although they are most likely (in this author's opinion) to have these experiences in a capital city setting or 'hotspot' such as Yulara/Uluru, Alice Springs, Kakadu and North Queensland.

While New Zealand is traditionally Australia's strongest international visitor market – and China expected in the current forecast to grow considerably over the next decade – the strongest consumption by percentage is in German, UK, Canadian, US and other European markets.

This latter point is confirmed by the *Segments Insight Pack* (op cit), from which the following market summaries are drawn.

7.3 Segment Insights

Germany

The *Segment Insight Pack* found that cultural experiences were an important part of the long-haul travel experience amongst German travellers. Aboriginal experiences have the potential to meet this need. Findings from Brand Audit research show that amongst German travellers there is an interest and curiosity in Aboriginal culture and 80% agreed that they could experience a very interesting Indigenous culture in Australia.

Additionally, findings from the Survey of Indigenous Tourism (1999) confirmed that of the countries included, German visitors had more knowledge of and the highest level of interest in Aboriginal culture upon arrival in Australia.

United Kingdom

Visitors from the United Kingdom stated that they had a high level of knowledge about Aboriginal culture on arrival in Australia. 75% of respondents agreed that they could experience a very interesting Indigenous culture in Australia. Although slightly less so than Germany, the United Kingdom appeared to be a market with good potential overall for Aboriginal tourism. There was a desire to have ‘an Aboriginal experience” but this came with the question “how?”.

Canada

Similar to United Kingdom and “other Europe”.

United States

Although below Europe and Canada, a sizeable number of Americans participated in Aboriginal tourism products. They also expressed a high level of interest in Indigenous culture upon arrival in Australia. 84% agreed that they could experience a very interesting Indigenous culture in Australia.

Other European

Visitors to Australia from other European countries (approximately 30 countries excluding Germany and the UK) had relatively high participation in Aboriginal tourism. Again there was a desire to have an “authentic” experience but with this came the question ‘how?”. The European market thus presents a good market potential but requires education. Other research (*Flamingo Brand Research, Australian Tourist Commission 2000*, which surveyed key markets to establish key perceptions and needs with relation to Indigenous tourism in Australia) indicated that knowledge about Aboriginal experiences was low, particularly in Italy, France and the Netherlands.

New Zealand

It is worth noting that while New Zealand is our largest international market, New Zealand visitors have very low interest in experiencing Aboriginal culture in Australia. This is despite a high level of awareness that Australia can readily provide such experiences.

7.4 Indigenous Tourism Snapshot

Tourism Research Australia’s *Snapshot*[2] provides the following summaries of International and Domestic Indigenous Tourism:

- International Indigenous visitors (defined as visitors who participated in at least one of three Indigenous tourism activity during their trip: visiting and Aboriginal site or community; experiencing art/craft or cultural display; or attended a performance by Aboriginal performers)

[2] *Market Sector Snapshot: Indigenous Tourism Visitors in Australia 2007, Tourism Research Australia, Canberra.* Copy appended for further reference.

accounted for around 16% of all international visitors to Australia in 2007
- 65% of international Indigenous tourism visitors participated in only one Indigenous tourism activity, while around 25% participated in two activities and 10% in all three. Experiencing Aboriginal art/craft or cultural display was the most popular activity for international visitors accounting for 76% of all visitors or 634,000 visitors
- There were 677,000 domestic overnight Indigenous tourism visitors (defined as visiting an Aboriginal site or community or experiencing Aboriginal art/craft or cultural display) during 2007
- The five most popular regions visited by domestic Indigenous tourism visitors in 2007 were: Darwin (92,000 visitors); Alice Springs (77,000); Petermann (Uluru/Yulara) (70,000); Kakadu (52,000); and North-West WA (51,000)
- Domestic overnight Indigenous tourism visitors visiting and Aboriginal site or community increased in 2007 to 334,000 visitors (from 232,000 in 2005)
- While there had been growth (in 2007) in domestic Indigenous tourism visitors, only a very small proportion (less than 1%) of all domestic overnight visitors participated in the defined activities

7.5 Visitors to the Region incorporating APY Lands

The Regional Tourism Profile for Outback SA[3] (shown at Appendix X and covering the north of SA excluding Port Augusta, the West Coast and Flinders Ranges), gives some insight to visitation to the region incorporating APY Lands. The summary below is drawn from that document.

Outback SA Region Summary 2007

	Expenditure	Visitors	Nights	Average stay	Average trip expenditure	Average nightly expenditure
	$ million	'000	'000	Nights	$	$
Domestic overnight	51	187	599	3	273	85
Domestic day	np*	31	-	-	np	-
International	np	39	102	3	Np	np

* np = not published due to reliability concerns

- $63 million was spent by visitors on the region, with domestic overnight visitors accounting for 81% of total spend.
- There were a total of 257,000 visitors to the region, of which 73% were domestic overnight visitors.
- 701,000 nights were spent in the region, with 85% by domestic overnight visitors.
- 35% of nights by domestic overnight visitors and 64% of nights by international overnight visitors had holiday/leisure as their purpose of visit.

[3] *Regional Tourism profiles 2007, South Australia Outback Region, Tourism Research Australia,* published August 2008

- 48,000 domestic overnight visitors were travelling by private car, 96,000 by air.
- 19,000 international overnight visitors were travelling by private car (no data on air travel available).
- 18% (34,000 people) of domestic overnight visitors participated in culture and heritage experiences (no data available for Indigenous experiences). (NB: NT profile shows 36% of domestic overnight visitors took in an Indigenous experience.)
- 91% (35,000 people) of international overnight visitors participated in culture and heritage experiences, and 78% in Indigenous experiences. (NB: NT profile shows 81% of international overnight visitors took in an Indigenous experience.)
- The average stay for both domestic and international overnight visitors was two nights.
- Of 187,000 domestic overnight visitors, 94,000 (50%) were from SA and 41,000 (21%) from Victoria (no further data available).
- Of 39,000 international overnight visitors, 9,000 (23%) were from Germany, 6,000 (15%) from the UK and 3,000 (8%) from the USA.

Of interest in the analysis of expenditure is that no expenditure on packages (tours) was recorded for domestic overnight visitors (no published data for international overnight visitors).

The only statistics for Stuart Highway traffic identified by the authors of this report are contained in an RAA report (*Stuart Highway, May 2007*). This recorded daily vehicle traffic in the range 360-750 (presumably reflecting seasonality), with non-commercial traffic accounting for 73-79% of the total. This suggests that at least 94,000 private vehicles travel the highway annually (data above points to 67,000 individuals staying overnight in the region).

The activities engaged in by international travellers to Yulara/Uluru are of some interest and were tracked in a further study flowing from the 2005-06 International Visitor Survey[4].

International Travellers: Petermann (Uluru) – Jan 2005-Dec 2006
Top 10 Activities

Visit national and state parks	65%
Eat out	57%
Visit Aboriginal site or community	45%
Aboriginal art craft and cultural displays	42%
Visit the outback	40%
Shopping for pleasure	35%
Guided tours or excursions	35%
Bushwalking	22%
Visit historic buildings or sites	14%
Aboriginal performance	7%

[4] Published in *Activities in regions: International travellers, Petermann (Uluru) – January 2005 to December 2006, Tourism Research Australia*

Quantitative findings for three key markets quoted in the Segments Insight Pack on Aboriginal Tourism ([1]op cit) reported on respondents' response to a number of statements relating to Australia, including the statement:

"I could experience a very interesting Indigenous culture there, from Indigenous dance performances to unique arts and crafts"

USA respondents:	23% strongly agreed 61% agreed
German respondents:	32% strongly agreed 48% agreed
UK respondents:	30% strongly agreed 45% agreed

7.6 The General Tourism Market

This section of the report provides an overview of general tourism markets and trends for the nation as a whole.

While tourism has been a key growth industry for a number of years, the most recent forecast issued by the Tourism Research Committee of Tourism Research Australia (February 2009[5]) on behalf of Tourism Australia confirms that the outlook is not positive.

The forecast predicts that the number of international arrivals to Australia will fall by 4.1% (229,000 people) to 5.3 million in 2009[5]. With domestic tourism nights expected to fall by 0.9% during 2009[5].

Although tourism volumes will decline, forecast predicts that the lower Australian dollar (and oil prices) will support tourism spending growth: with greater spending power for international visitors and cheaper vehicle travel for domestic tourists. This is likely to lead to a slight (0.3% or $0.3billion) increase in overall tourism spending[5.] The domestic share of tourism spending is, however, likely to increase by $1.2 billion[5.]

While a further revision of the Tourism Research forecast (which itself recognises that uncertainties in the forecasting environment are at a 'high water mark') is not due for some time, it is quite feasible that the level of international and domestic activity will decline to an even greater degree given the accelerating impacts of recession in our key markets, and most recently Australia amongst them (with the latter to bear significant growth in unemployment).

[5] Tourism Forecasting Committee *Forecast 2008 Issue 2* (revised February 2009), Tourism Research Australia, Canberra

INTERNATIONAL VISITORS BY MARKET:
HOLIDAY AS PRINCIPAL PURPOSE OF VISIT[5] ('000)

ORIGIN	2008	2009 (forecast)
New Zealand	537	533
Japan	371	326
United Kingdom	348	314
United States	210	213
China	183	190
Germany	105	105
France	53	56
Italy	38	34
Netherlands	30	29
Switzerland	27	25

DOMESTIC TOURISM, 2008 TO 2017 ('000) [5]

FORECAST YEAR	HOLIDAY VISITOR NIGHTS (NATIONAL)	HOLIDAY VISITOR NIGHTS (SA)
2008	136,375	8,742
2009	135,673	8,699
2010	135,525	8,679
2011	136,102	8,726
2012	136,238	8,734
2013	136,783	8,768
2014	137,330	8,804
2015	137,879	8,839
2016	138,431	8,874
2017	138,985	8,910

A South Australian Tourism Commission report[6] for the year ended December 2008 suggests that domestic tourism nights (with holiday as principal purpose) in this state are distributed (approximately) as 37% interstate (c 3.2 million nights) and 63% intrastate (5.5 million nights). The same report shows a decrease from 2007 of 21% in the number of interstate visitors for 2008 (and an 18% decrease in nights) and a decrease from 2007 of 2% in intrastate visitors (but nights up 5%). The Tourism Australia Research forecast (op cit) suggests that there will be a continued decline over the two years 2009-2010.

[6] *South Australian Tourism Trends, Update March 200*

The following table extracted from the SATC Trends document (op cit) provides a useful summary of all visitors to SA for 2008 (relative to 2007 performance).

SUMMARY OF VISITOR ORIGIN – YEAR ENDED December 2008

	Visitors	Nights
International	7%	27%
Interstate	34%	36%
Intrastate	59%	37%
Total*	100%	100%

Estimates may not add to 100% because of rounding

INTERNATIONAL – YEAR ENDED December 2008

	Visitors	Nights
Performance	Down 2% to 356,100	Little chance, down 0.2% to 6,838,000
Market Share	Down marginally from 7.0% to 6.9%	Down from 4.3% to 4.1%

INTERSTATE – YEAR ENDED December 2008

	Visitors	Nights
Performance	Down 10% to 1,818,000	Down 5% to 9,111,000
Market Share	Down marginally from 7.0% to 6.9%	Rose from 7.2% to 7.4%

INTRASTATE – YEAR ENDED December 2008

	Visitors	Nights
Performance	Down 7% to 3,173,000	Up 1% to 9,543,000
Market Share	Down marginally from 6.9% to 6.8%	Up from 6.1% to 6.4%

STOP PRESS!

A report just to hand, Australian Tourism and the Recession, Joint Government/Industry Recovery Strategy – April 2009, produced by Tourism & Transport Forum (TTF) and prepared by economist Geoff Carmody, is already warning that the Tourism Research Committee forecast is optimistic and that the industry should prepare for worse outcomes. Key findings were:

- *Reductions in inbound and domestic visitor numbers and tourism expenditure in Australia (the latter in contrast to the Tourism Research Committee's prediction of slightly increased expenditure) will probably be in excess of official forecasts.*
- *Tourism expenditure will fall more in regional areas than in the rest of Australia.*
- *Falling household wealth, incomes and consumer and business confidence will see tourism spending fall more than consumer spending on average.*
- *International and domestic tourists will be less inclined to travel to destinations far from home.*

TTF predicts that this last effect will be most dramatic in regions remote from cities, ie regions such as Central Australia and Tropical North Queensland, because of their *high reliance on inbound tourism (57% of all visitors to the Uluru region being international, for example).*

The report continues with the prediction that domestic tourism will not replace declining inbound traffic as suggested by the Tourism Forecasting Committee forecast.

Regional air carrier Regional Express signalled on May 1 2009 that it is likely to reduce flights. In SA, this could see a marked impact on tourism traffic to Coober Pedy and reduce that gateway's value and potential as a gateway to APY lands.

7.7 Target Markets

The preceding section provides an overview of key geographical markets for Indigenous tourism in Australia.

Segmentation by other groupings – such as age and principal reason for visitation – is not particularly comprehensive in terms of the micro identification of prospects for Indigenous tourism development.

7.7.1 Experience Seekers

Northern Territory Tourism (and other) relevant tourism destination managers have identified the "Experience Seeker" as the primary market opportunity.

Tourism Australia segmentation studies[7] define Experience Seekers as:

- Experienced travellers for whom travel plays a big part in life and who...
- Look to challenge themselves, be it physically, emotionally or mentally
- Desire a high level of engagement with the local people and culture
- Wish to experience not witness destinations
- Like to avoid the tourist route, preferring locations that are untouched

They can be found in different age groups, incomes and regions. They have a mindset and attitude to life that stretches well beyond the category of travel including personal development and everyday life.

International Experience Seekers are targeted by Tourism Australia (and states and territories) because they:

- Are likely to undertake long haul travel
- Are high yield prospective customers
- Are likely to disperse beyond major capital cities and gateways
- Are non-rejectors of Australia

Australian Experience Seekers are also a vital component of domestic tourism. Tourism Australia summarises the segment[8] as follows:

[7] Reference is made here to definitions contained in *Tourism Australia's Global Target in the USA, Understanding Experience Seekers in the US Market,* one of a suite of documents has produced for international target marketing. This and equivalent documents for other key international markets are appended to this report.

[8] *Tourism Australia: Domestic Experience Seekers*

- Australian Experience Seekers enjoy travelling both interstate and overseas.
- They tend to spend more while on holidays – on average more than $3000 per person per trip.
- They represent 18% of those who have a preference for both interstate and overseas travel but contribute about 70% of spend by this group.
- Experience Seekers currently represent a group of one million Australians.
- Importantly, they take an average of four holidays a year. More than half of these trips are being taken overseas and this proportion is growing.
- Experience Seekers are united by their passion for holidays and propensity to spend while on them. But they come from different life stages including Young Couples, Affluent Families and Older Affluent Couples.

7.7.2 Backpackers

Backpackers are a significant niche market. Given their current high representation amongst travellers through northern SA (using the Stuart Highway as a major travel route) and visitors to Uluru/Yulara, they are of interest to development of tourism in APY Lands in the longer term.

Tourism Research Australia published a major report in 2003 (*Backpackers in Australia 2003, Niche Market Report No. 4, Cecil Ipalawatte*) that reports in detail on this market segment. Noteworthy findings were:

- The backpacker tourism market has become one of Australia's most successful niche markets.
- International and domestic backpackers in Australia increased from 753,000 in 1999 to 943,000 in 2003.
- International backpackers visited and average of 6.2 regions in Australia in 2003, compared with an average of 2.0 regions visited by all other international visitors.
- Backpackers spent approximately $2.7 billion in Australia in 2003 of which 83% was spent by internationals.
- In 2003, international backpackers spent twice as much as mainstream visitors (largely as a result of longer average stays).
- While almost half of international backpackers' expenditure was on accommodation, food and drink, 9% was spent on organised tours. Their average spend of $423 on tours far exceeded the equivalent average spend by non-backpacker internationals, which was $83 per visitor, and totalled almost $200 million.
- 41% of international backpackers used coaches for long-distance travel between stopovers.
- South Australia secured around 20% (92,000 visitors) of the international backpacker market and 6% (24,000) of domestic backpackers in 2003.
- 17% of international backpackers visited Uluru in 2003.

- 84% and 37% respectively of international and domestic backpackers were in the age bracket 15-34 years, 13% and 41% respectively in the 35-54 year bracket.
- Backpackers are important contributors to tourism volumes during seasonal lows.

7.8 Market Conclusions

From national and state agency information, the primary target markets of interest to longer-term APY tourism development are:

- International and domestic Experience Seekers
- The backpackers' niche market, with an emphasis on the international segment
- As key markets for the above:
  - UK
  - USA
  - Germany
  - Other Europe, notably Italy, France and Switzerland

Local information (particularly from the two operators with greatest contemporary experience in the Lands, ie Desert Tracks and Diverse Travel[9]) suggests further that markets with current or expected (in the medium term) viability are likely to be:

- Private secondary school groups seeking cultural immersion tours relevant to curriculum (currently served by Desert Tracks products)
- High-end groups visiting equipped destinations such as Cave Hill, Angatja, Mt Woodroffe and Victory Well (all currently served by Desert Tracks), with air travel into APY Lands as the principal means of transport
- Groups wishing to climb Mt Woodroffe and walking groups generally (Ngintaka Trail forms part of the products in development to suit the latter market)
- 4WD tag-along tours drawn from 4WD clubs and special interest groups (currently served in part by Frank Young's Tag-Along Tours)
- Tailored tours developed for individuals and/or family groups drawn from specific groups/markets (Caroline Densley of Diverse Travel points specifically to the summer-holiday academic markets, notably in the USA, and the culture/art interested from Germany, Italy, France and Switzerland; Earthwatch and SA Museum Waterhouse Club as examples of special-interest groups previously visiting the Lands)
- Domestic and international Aboriginal art-interested markets wanting to visit art centres to buy art and meet artists at source (currently or previously served by Ku Arts, Wrightsair, Ayers Rock Air Charter, Diverse Travel, Desert Tracks etc)
- For Indulkana and Iwantja Arts & Crafts, coach travelling backpackers and independent travellers using the Stuart Highway

[9] Interviews conducted with Brett Graham, Desert Tracks and Caroline Densley, Diverse Travel

- Other special interest groups seeking “cultural immersion” (an example being a group of over 100 women drawn to an inma camp near Ernabella a few years ago)

Further niche market opportunities will reside in the development over time of new APY Lands product and the infrastructure to deliver it, but all will depend on the identification of specific, viable target markets. Examples of niche markets that, in the experience of the authors, might be exploited in tailored tour product include (but are not necessarily limited to):

- Alternative/natural food and medicine (bush-tucker) enthusiasts
- Landscape painters (art groups; adult education students)
- Hands-on environmental experience seekers (Earthwatch; Friends of Desert Parks; landcare groups; tertiary environment, biology and ecology students etc)
- Mountain bikers (there are already established clubs and organisations as well as active tour organisers)
- Birdwatchers (ornithological groups)
- Pitjantjatjara language students
- Friends/family of staff working in or with the Lands

It is important to acknowledge that Indigenous tourism in Australia is still neither well developed (in terms of products and market definition, penetration and performance, particularly in remote areas) nor exhaustively documented. As discussed in the following section, distribution (sales) networks are also in their infancy. These factors suggest strongly that Indigenous tourism is, with the exclusion of exceptional destinations such as Uluru, essentially a cottage industry. As such, it is one where experimentation and market testing remain the principal tools in the development process.

7.9 Distribution

Distribution is the means by which tourism product is taken and presented to the market. It includes: wholesale travel agents representing the product to retailers; retail travel agents offering the product to the market; other product providers bundling a number of products together; suppliers to the primary product (principally those providing transport where they are tour operators in their own right); and non-travel industry third parties (such as special interest groups, educational institutions and so on) offering the product on a retail basis to a ‘closed’ market or audience. Increasingly, some promotional media, notably the internet, are also part of the distribution as well as promotional toolkit.

Distributors are ‘paid’ for their sales through commissions, which are generally 10% for retailers but may be as high as 20% for wholesalers and 35% for inbound tour operators.

Specialised distribution of Aboriginal tour product has not been developed on any appreciable scale. Rather there is a small population of wholesale and retail distributors/agents who promote such tour product, and almost entirely alongside other, higher volume products.

Within APY Lands, the only retail distributor is Desert Tracks, which distributes its own products (with limited wholesale support from other sources).

Within South Australia, the only wholesale/retail distributor (other than product suppliers themselves) of significance is Diverse Travel, which acts as an agent for Aboriginal tour product in all states of Australia.

Notwithstanding this, it is felt that new (and reliable) product that has qualified market opportunities and appropriate pricing (including commission structures) will find support amongst distribution agents and networks. However, the nature of tourism development in the Lands is likely to be along low volume lines (ie catering for small numbers of visitors annually) and therefore of limited appeal to high volume distributors such as major travel agents and inbound operators. This means that special-interest distributors will need to be identified and cultivated during product development.

7.9.1 Distribution Lead Times

Worthy of special mention is that distributors (product sales agents and collaborators) require adequate time for promotion and sales in the marketplace.

This lead time (the time between confirming the product with all of its suppliers and the time that the customer actually visits or embarks on the tour) will vary. Depending on the nature and price of the product, for domestic sales lead-time will be at least 6 months and more likely a year, and for international sales up to two years. Where the key distributor – perhaps a wholesaler – is relying on one or more international retailers, even this latter time may be extended.

7.10 Pricing

Pricing of APY Lands product is perhaps the most problematic area of concern when contemplating new product development. This is particularly so given the general expectation amongst the population (Anangu who consider they can develop a product) that tourism is potentially high in financial returns and that those providing tours, guiding and so on can earn relatively high fees.

The aim of this section of the report is to give an overview of product pricing and the special problems facing the APY Lands' product developer so that unrealistic expectations are not generated or supported.

There are a number of factors to be considered when setting prices for new product.

The two important prices for a tourism product supplier are:

- The GROSS price, which is the price that the end customer pays (inclusive of GST); and

- The NETT price, which is the price that the retailer, wholesaler or inbound operator pays to the product supplier after commissions and any other agreed distribution costs.

The product provider must therefore be able to operate profitably at the NETT price. (Note that in the case of a product provider able to make sales direct to customers, the GROSS price is effectively the NETT price, ie direct sales are potentially more profitable.) All costs incurred in providing and promoting the product must be met by the NETT price with a margin achieved for the desired level of profit.

The components of product pricing are:

- FIXED COSTS, which are the overheads of the business (marketing/promotion, operations and administration) and must be spread across the product range
- VARIABLE COSTS, which are the costs incurred when the product is actually sold (and may include meals, driver and guide wages, permit fees, vehicle cleaning or maintenance etc, or the cost of third parties providing ground transport or other services)
- PROFIT MARGIN, particularly when there are other parties (such as communities or suppliers such as ground transport providers) that need to participate in profit sharing
- GST, if applicable; and
- COMMISSIONS payable to agents and other distributors.

Where there are development costs (such as market research) and capital costs (such as built infrastructure or equipment purchases) that are not funded separately by grants or other means, these must also be built into the pricing structure.

Ultimately, the pricing structure and involvement of distributors is somewhat analogous with the art-centre story, in that the product supplier (the artist) receives a NETT price after an art gallery retains 45% of the GROSS price and the art centre (as a materials and service provider) retain 30-50% of that. This is an important analogy, as it is likely that most new APY product providers (the majority of whom will require product distribution services) will see their NETT prices being as little as 50-60% of the GROSS price of the product in the marketplace.

For those wishing to investigate pricing more, the South Australian Tourism Commission has produced an Excel-based interactive pricing calculator, which is appended to this report and available for download from the SATC website.

A reasonable rule for pricing a new product is to work with lower margins during the introductory period to ensure that a market is secured. Of special concern to this report – and to those operators currently active or contemplating involvement in tourism in APY Lands – is that the remoteness of APY Lands adds special cost burdens to the product provider and customer.

The simplest of these concerns is the cost for travellers to connect with Lands-based product from major Australian domestic markets and international gateways. Generally speaking, this cost is borne by the end-user and not included in the tour product price but is considered in the overall purchase decision made by the customer.

Further implications of the Lands' remoteness on product prices (relative to metropolitan and non-remote providers) include:

- High fuel costs for ground transport within the Lands
- High food costs and availability and transport issues for group catering
- High travel costs for guides and other staff when they are not travelling with tour parties (or not afforded return travel to their home base)
- High insurance costs
- High recovery costs for any vehicle breakdowns or emergencies
- High cost of infrastructure and equipment
- High communications costs when away from communities
- Lack of visitor infrastructure (which impacts on price, for example, where visitors are expected to be accommodated in tents or swags and not have ready access to toilet and ablution facilities)

All of this is in the context of a tourism market that is, generally speaking, price sensitive, where all other destinations inside and outside Australia (including the potential international visitor's country of origin) are competitors and currency fluctuations, exchange rates and oil-price-sensitive transport costs can have a dramatic effect on travel decisions.

A number of industry sources confirm that discounting is an important strategy to adopt in the current environment.

As suggested elsewhere, the options that APY Lands have to develop viable tourism products are significantly limited and need to play into three distinct pricing brackets:

- Those at the high end of experiential markets who are prepared to pay a premium (and endure some discomfort during a short duration tour) for a carefully structured, reliably delivered and serviced high value "cultural immersion" product not otherwise available elsewhere; and
- Those who will pay a reasonable, value for money price for a longer duration tour offering a more "standard" experience (ie, less specially curated content, perhaps walking or sightseeing tours that involve less interaction with Aṉangu); and
- Those who seek minimal up-front cost but will pay for optional extras once on tour (eg tag-along self-drive tours that offer as options inma, story-telling and site visits).

Consultation with current product providers in remote areas confirms that it is especially difficult to get high prices for tours when accommodation is limited to swags or tents.

Examples of prices for tours in the Lands are:

- Desert Tracks **Cave Hill 1 Day Experience**: $237 ($180 child)
  Departs Ayers Rock daily, includes vehicle travel, Anangu guides, permit fees, morning tea and picnic lunch, Cave Hill tour.
- Desert Tracks **5 Day Angatja Bush College**: $1,950 ($975 child)
  Departs Ayers Rock, itinerary: Cave Hill, Angatja. Includes permits, guides, tours to sites, Tjala Arts and Ngintaka Trail, camping at Angatja, meals.
- Wrightsair **Full Day Art Tour**: $1,400
  Departs William Creek daily. Includes air travel and visits to Amata, Fregon and Ernabella art centres (via Cadney Park).
- Desert Tracks **Mt Woodroffe Climb** (3 days): $880
  Departs Ayers Rock (Sep 2009). Includes ground transport, camping at Ngarutjara, guides, Anangu story-telling, meals, climb.
- KU Arts/Banksia Tours **Art Centre and Cultural Tour** (5 days, last operated in Oct 2008): $1,300
  Departed Yulara. Includes permits, Anangu guides on site, camping, swags, meals. Itinerary: Nyapari/Piltati, Watarru, Kalka, Ernabella.

7.11 Promotion

Promotion of travel product remains a function of the distribution process and is well developed within the tourism industry.

For product providers, there are three levels of promotion as described below.

- Direct promotion
  This is promotion undertaken by the product provider and entails a mix of: point-of-sale print material (used in travel agents, information bureau and other outlets frequented by target customers), media advertising, publicity (editorial or feature material) within mass or specialised media, direct marketing to customer databases held by or accessible to the product provider), regional and local directional signage and word-of-mouth promotion by existing customers. Internet (www) based promotion is increasingly important and effective as customers seek and research product selections. Attendance at key consumer trade fairs is also of growing importance, not only for generating sales but for building profile with potential distributors and getting to know the market directly. Direct promotion to tourism development agencies (such as regional bodies or the state and national tourism commissions) is also a key component of direct promotion.

- Wholesaler promotion
  This is promotion undertaken by the wholesale agents representing the product and is targeted at retail travel agents, inbound operators and travel organisers. Their principal objective is to have the product incorporated in the product manuals or ranges of those bodies and to support their efforts in promoting the product. In addition to the material produced for direct promotion, they will require general destination

information and details of travel gateways, historical sales volumes, commission structures and long-term departure dates. They may also require testamentary material, ie photographic and video documentation and testamentary statements from previous customers. The product provider may also attend industry and consumer trade fairs in conjunction with the wholesaler.

- Retailer promotion
  Product providers will provide base promotional materials to retailers. From time to time they may enter joint industry or media promotions with retailers and attend consumer trade fairs to explain the product in more detail.

Industry leaders and opinion-makers (including travel media) are important recommenders (and quasi-distributors in one sense). The launch of new products will often involve complimentary places for these people (and potential distributors and agents) on tours. The cost of this needs to be incorporated in product pricing structures (discussed above).

Regional promotion (destination marketing) is traditionally the responsibility of a regional tourism body, which may be an association of regional operators or collaboration between those operators and local business and local government.

Destination marketing entails promotion of the region as a whole and represents all attributes and products offered by the region and its product operators. A detailed examination of destination marketing is beyond the scope of this report but it may be summarised as follows:

- Gathering and collating relevant information and data
- Developing standard destination information (general attributes, weather and travel details, primary gateways etc)
- Developing a regional identity, logo and house style for promotional matter
- Developing and managing quality assurance and accreditation programs for regional operators
- Representing the region to travel industry, media, agencies and planning and marketing authorities.

As a conclusion, it was noted in consultation with current tour operators that word of mouth promotion (promotion by recommendation of tour participants to their own networks) is the most effective promotional medium.

8. Developing a Product

This section seeks to provide an overview of the process of developing a new tourism product. It is not intended to be definitive and those considering product development should seek further expert assistance.

The major development steps are to:

- Define who the market (customers) would be
- Define the product and its elements in general terms (what it is and who needs to provide or do what to deliver it locally)
- Explore the fixed and variable costs of each element to arrive at an estimated cost
- Seek external advice from potential operational partners and distributors and from industry advisers (internal and external)

It must be emphasised that the principal and essential element is the first step: knowing who the product is aimed at and how customers will be identified and targeted.

It must also be realised that time is the most crucial investment. All of the suggested steps take time to be completed successfully and reliably.

Equally, it takes a significant amount of time to promote a new product in the marketplace and secure sales. From the point of view of the customer, most Australian travellers need perhaps a year or more to plan major holidays such as those represented by potential APY product. International travellers may need even longer. From the distributor's point of view, it may take at least a year (at least two years for international markets) to get new products into travel retailers' product range.

Even when sales begin to flow, it may then take several years for volumes to build to desired levels and for profits to be maximised.

(NB: there may be some exceptional cases where shorter lead times are possible. Backpackers, for example, have a greater tendency than other travellers to make impulse decisions. However, they are less likely to be interested in high price products than those that are lower and value for money. Desert Tracks' day-tours from Yulara to Cave Hill – which are essentially an impulse purchase made by visitors already in the region – are an example of a product that could be brought to market relatively quickly.)

So the time from having a product ready to launch to hosting first visitors may well be in the range 1-3 years, with the longer period being the norm.

8.1 Defining the market

- Who will want to come here and do what I am planning?
- Where do they live, what age are they, what are they interested in?
- How long would they want to be here?
- Who of them would be happy to bush-camp?

- How much would they be happy to pay?
- How would they like (most easily or cheaply) to get to the Lands (eg by coach from Alice Springs, Adelaide or Yulara, by charter plane to the community)?
- How do I tell them about my product?
- If I can't answer these questions who can help me?

8.2 Defining the product

- What can I offer that would make people in this market want to come here?
- Can they get the same thing somewhere else (in the Lands or anywhere else in Australia or the world) and can I make this product special?
- What is core product from the customer's point of view (eg "experiencing traditional Aboriginal culture through meeting Elders, visiting special sites, enjoying inma etc)?
- What are the parts that make up this product (eg visits to country, inma, bush-tucker gathering)?
- How long would people need to be here to experience this (eg 2 nights and 3 days)?
- When is the best time for people to come (eg early winter, late winter, spring etc)?
- Where will people stay and will they have access to toilets and showers etc?
- Who do I need to deliver all the parts of the product (eg locally: Traditional Owners, guide/s, driver/s, singers/dancers, interpreter, cook; elsewhere: charter coach company, food supplier, agents to sell the product etc)?
- What equipment do I need (eg swags, generators, vehicles, cooking equipment etc)?
- What do I do if any of the people helping to deliver the product can't do it?
- What do I do if business or bad weather means I can't deliver the product?

8.3 Costing

- How much will I need to pay the people who are helping me (including external ground transport providers)?
- How will I provide and pay for equipment?
- What will I have to pay for before and after the visitors arrive?
- How many people need to come to meet my costs?
- How much profit do I need to make it worthwhile?

8.4 Getting help

- Who can I talk to about my product to say whether it can work or not?
- What travel operators or agents can help me?

9. Policy

9.1 Guiding Principles

Pivotal to advancing tourism development in the Lands is the policy framework within which all can work successfully in the knowledge that the framework has regional consensus. In addition, building relationships with the tourism industry requires confidence that the rules governing product ownership, delivery and distribution of economic benefit are universally accepted, settled and complied with.

The consultants used the following key principles as the basis for consultation with Anangu. These principles are proposed as the basis for directing policy development.

Principle 1

That tourism development should be used as a vehicle to maximise the overall economic, cultural, community and social development of APY Lands and all Anangu, but in a way that maximises direct benefits to Anangu through local enterprise development, employment, training and skills development, earned income, land management and cultural maintenance.

Principle 2

That all infrastructure (buildings, toilets etc) developed to service tourism needs should be locally owned (not owned by external tour operators).

Principle 3

That no tour external operator be granted exclusive visiting rights to any facility or attraction that is communally owned under the Act. (Competition between operators is what will get the best money for Anangu.)

Principle 4

That Anangu involvement in tour delivery be maximised and that tourism development is used where possible as a base for building locally owned and operated enterprise.

Principle 5

That tourism products should be consistent with and promote appropriate cultural practices, knowledge and protocols.

Principle 6

That where possible, tourism products should be complementary and non-competing so that everyone is promoting their products together.

Principle 7

That preference be given to low volume/high yield tourism development as a means of minimising environmental impacts and maximising returns to Anangu.

Consultation with Anangu necessarily involved paraphrasing of these principles to allow clear comprehension but it is fair to say that there was general agreement with them.

It is recommended therefore that the foregoing principles be adopted by APY as the foundation of a tourism policy.

9.2 Policy framework

The significant policy discussion contained in the ACHM report (op cit) cannot be set aside. It represents a well considered distillation of major areas to be covered by policy and the concerns that should be addressed.

Policy topics suggested within the ACHM report are summarised here.

- Access and Permits (for tourists and tour-operators)
- Advertising and Marketing (standards and approval processes)
- Tourism Profile (scope of and responsibility for destination marketing)
- Fees and tour rates (setting of recommended standard fees for guides, dancers etc to ensure equity)
- Protection of Cultural Heritage (incorporate current cultural heritage management practices and apply then to tourism)
- Tourism and Land Management (to involve APY Land Management in developing a Land Management policy for application to tourism for high- and low-usage areas)
- Ranger Program (establish under Land Management to monitor permits, assigned tourism routes, camping sites, high use tourist destinations and assist with managing sites such as ensuring they are maintained and ready for each new group etc)
- Ownership of product – Intellectual Property (includes photography policy, marketing, advertising etc to ensure public confidence in integrity and authenticity)
- Tourism Infrastructure (define infrastructure policy and provide guidelines about ownership and responsibility; policy on directional/interpretative material etc)
- Indigenous and Non-Indigenous Tour Operator Framework (set up a register of licensed operators; establish assessment criteria which operators must meet to qualify for a licence; offer accredited operators a 5-10 year licence supported by an agreement or permit to operate in prescribed areas identified by the operator; implement a clause in agreements allowing operators to negotiate access to alternative areas on the spot when confronted with unexpected wet weather or areas closed for cultural reasons)
- Anangu tourism Enterprise Model (outline options for Tourism Enterprise Models in the policy)

- Capacity Building (increase tourism awareness through capacity building by running a series of workshops for interested Anangu, Community Councils and APY Executive and provide people with information to increase their decision making abilities. Develop guidelines and information for Anangu interested in pursuing tourism activity.)
- Consultation (conduct community consultation across the Lands on tourism policy issues so that Anangu have the opportunity to identify and determine what the key issues are and how they want tourism managed)
- Cross cultural Awareness for Tourists (develop a standardised cross-cultural handout for tourists visiting the Lands)

DECISION POINT: If APY can endorse these policy topics at this Draft Stage of the report, the consultants will provide further expansion of policy content.

10. Regulation and Management

10.1 Anangu (APY) Tourism Office

The need for regulation and a management strategy to control the entry of non-Anangu onto the APY Lands has been evident since first contact. The early efforts by Anangu concentrated on protection of sacred sites and areas of cultural significance as well as preservation of traditional water supplies.

In 1995 Mike Last produced a document on behalf of the Land Management unit of the Pitjantjatjara Council Resource Centre advising Anangu on ways to “look after the land if it is to be used continually by people”. This was further expanded by the same author in 2005 in a document produced on behalf of the APY Land Management Unit: “Visitor Management Strategy and Cultural Site Protection Strategy”.

Other reports examining visitation of Aboriginal Lands in Australia, and in particular the major report pertaining to the APY Lands produced by Australian Cultural Heritage Management titled “APY Tourism Policy Development Report” by Pemberton and Katnich, advise that tourism on APY Lands requires regulation by a central body.

The recommendation of tourism on the APY Lands requires proper control, management and regulation by a regional organization was a major point raised by the consultants during the discussions with Anangu on the Lands for this report.

The overwhelming majority of Anangu consulted regarding tourism development on the APY Lands requires centralised regional regulation and management – a Tourism Office.

The main point arising from consultations with Anangu in relation to the APY Tourism Office are that it should

- Be under the control of Anangu through an Anangu regional organization.
- Be located on the APY Lands
- Be staffed by people with expertise in developing and supporting Anangu tourism enterprises that are culturally acceptable.
- Provide employment for Anangu
- Provide, or at least coordinate training in tourism for Anangu
- Provide support and assistance to Anangu communities, families and individuals who wish to develop tourism enterprises
- Regulate and oversee the operations and activities of outside tourism providers and tourist operators

This report therefore recommends that:
A Tourism Office be established on the APY Lands.

10.2 Location of Tourism Office

APY Executive is the regional Anangu organisation representing all Anangu on the Lands and has statutory responsibility for matters relating to the use and management of the Lands.

APY has an established and highly regarded Land Management Unit that will need to be involved in the development of Anangu tourism enterprises, integrating land management and tourism. APY has established administrative offices on the Lands at Umuwa and sound administrative procedures developed over many years.

The consultants recommend that APY Executive establish a Tourism sub-Committee of the Executive in the first instance to act on behalf of the Executive. This Committee should consist of Executive members with an interest in and knowledge of the tourism industry and should be able to co-opt or recruit Anangu or any other members from outside the Executive as it sees fit.

This Committee will have governance responsibilities for the operation of the Anangu Tourism Office and receive reports from the Office staff regarding recommendations concerning the accreditation of both Anangu and non-Anangu tourism enterprises. It is considered that an approval process similar to that now used by the APY Executive to decide on mining applications and other development proposals might well operate in relation to tourism development.

The APY Executive and ultimately the APY general membership via general meetings would remain the over-riding governing body for the Tourism Committee.

This report therefore recommends that:
The Tourism Office be established under the management of the APY Executive and based at Umuwa.

10.3 APY Tourism Office role

In general the Tourism Office would have two main focuses. First, to assist Anangu communities, families and individuals to develop regional Anangu tourism enterprises. Second, to examine and regulate the delivery of tourism products by outside tourism operators in conjunction with the locally developed tourist enterprises. The Tourism Office would therefore be a regulatory body controlling tourism on the Lands on behalf of the Traditional Owners under the auspices of the APY Executive.

The Tourism Office would require the appointment of a professional Tourism Officer, similar to the current APY staff positions of Mining Officer and Housing Officer, and be part of the administrative office of APY at Umuwa. The Tourism Officer would be responsible to the Executive via its Tourism Committee and responsible for all the operations of the Office. In addition, this officer would require Anangu malpas to be employed as Anangu Tourism Officers or Rangers.

Without knowledge of the salary structures within APY we cannot give a fixed price on the recurrent costs of establishing such an Anangu tourism Office. However, costs in other sectors would suggest that a Tourism Officer and two part-time Malpas, with the addition of travelling costs and other recurrent expenses, would be in the order of $300,000 per annum.

Office staff travel on the Lands would depend on availability of vehicles from the existing APY fleet.

The consultants encourage the APY Executive to create the position of Tourism Officer immediately regardless of the funding requirements. If APY does not have the resources at present to fund the position it may be possible to add these responsibilities (or key responsibilities in the short term) to a current staff member in the interim.

Alternatively, or in combination with other strategies, a consultant may be engaged to commence the process or other staff may be able to be seconded from other agencies. In any case the creation of the position and the commencement of work even at a relatively low level of activity will send a strong message to the industry and funding agencies that APY is serious about its intentions to develop tourism on the Lands and to increase the economic viability of the region.

10.3.1 Anangu Tourism Enterprise Development

In assisting Anangu to develop successful tourism enterprises and make Anangu aspirations into reality the Tourism Office will need to resolve many issues. These include

- The tourism activities to be developed
- The numbers of tour visits per year and numbers of people in each visit
- The time of year for tourism activities
- Camp site locations
- Camp site facilities and funding for development
- Local Anangu employed and rates of remuneration for involvement

- Management of the funds
- Maintenance of tourism facilities, preparation and clean-up services
- Fall-back, or contingency, plans covering unforseen events interfering with delivery of the tourism product
- Liaison and negotiation with other Anangu tourism operators on the lands to develop joint ventures and / or access to another operator's facilities.
- Final costing of the tourism venture for presentation to the off-land operators and negotiations to deliver these packages
- Development of promotional material to advertise the product to tourists and official operators.

At the end of the product development state the Tourism Office, in conjunction with the Anangu owners, will have a comprehensive and costed tourism package / product to market. The Tourism Office should then accredit or licence this Anangu tourism enterprise. Only tourism products so accredited by the APY Tourism Office should be permitted to operate on the Lands.

It is therefore recommended that:
The APY Tourism Office develop local and regional Anangu tourism products in conjunction with Anangu communities, families and individuals and accredit / license these products.

10.3.2 Promotion of Anangu Tourism

The Anangu tourism Office will be the central body for coordinating promotion of local tourism products

In conjunction with PY Media, APY Land Management Unit, Ara Irititja and off-Lands organisations such as SA Tourism Commission, the Anangu Tourism Office will develop multi-media material and merchandise to promote the tourism destinations on the Lands. Only promotional material approved by the Tourism Office will be used by both local Anangu organisations and off-Land providers to advertise and present the tourism experience on the APY Lands.

10.3.3 Regulation of Tourism Providers

The Anangu Tourism Office would be the body responsible for the accreditation and licensing of tour operators wishing to come to the Lands. All current and future off-Lands companies wishing to be involved in delivering one or more of the accredited Anangu tourism enterprises in partnership with the Anangu owners of that enterprise will be required to go through an approval and accreditation process which, if completed, will result in a licence to operate being issued by the Tourism Office for a period of time and under conditions specified by the Office.

The Anangu Tourism Office would have the task of assessing any tourism proposal and making recommendations for that proposal's acceptance as presented, acceptance with any conditions that are deemed necessary or appropriate, or, rejection of the proposal. These recommendations would be presented to the Anangu Tourism Committee for its consideration.

Once a tourism product has been accredited and an operator licensed the Tourism Office should negotiate with the Permits Section of APY to establish the most efficient and workable process for the issuing of permits to visitors coming to the Lands on these tours.

10.3.4 Tourism Development Advisory Committee

To assist the staff of the Tourism Office and to provide expert industry advice and ideas the consultants recommend that the Anangu Tourism Committee establish a Tourism Development Advisory Committee to work with the Anangu Tourism Office. This Committee should comprise tourism industry members and operators such as Desert Tracks, Banksia Tours, Wrightsair, Diverse Travel, regional Anangu organisations such as APY and Ananguku Arts, and government agencies such as SA Tourism Commission and the Department of Premier and Cabinet.

The role of this Committee would be to provide advice to the Anangu Tourism Office regarding potential markets for tourism, product development and pricing structures that are achievable, preferred information and advertising distribution strategies, and, to assist in identifying tourism opportunities and development partners in the tourism industry. The Advisory Committee should also recommend appropriate training programs and training service providers, develop mentoring programs, and identify and provide support for community capacity building projects.

Another major function of the Advisory Committee would be to provide specialised industry information to the Anangu Tourism Office through research beyond the scope of the Office. It is further recommended that the Advisory Committee address the funding needs of the Anangu Tourism Office and investigate funding opportunities and avenues that may be available both within and outside the industry and through government grants.

It is envisaged that the Advisory Committee would operate pro bono and generally hold its meetings at regular intervals via telephone link-up or other electronic means.

It is therefore recommended that:
The APY Tourism Committee establish a Tourism Development Advisory Committee.

10.4 Role of APY Land Management Unit

As stated earlier in this report, the role of the Land Management Unit in the development of environmentally sustainable and culturally appropriate tourism development is critical. The consultants believe the Anangu Tourism Office should be located within the Land Management Unit in the first instance, or, have at least a very close working relationship with it. Advice from the Land Management Unit on location of camping areas, projected impacts of visitor numbers on natural and cultural sites, the impact on native fauna and flora and recommendations for maintenance and remediation of visitor areas are important aspects of the development of Anangu tourism products.

While it is recognised that Anangu tourism is developed by local families and communities, that is, the local Traditional Owners, it is possible that some tourism proposals for accreditation may require regional clearances and may require assistance from the APY Executive's anthropology section. The necessity of having to establish anthropological clearances for any tourism proposal will be assessed by the Anangu Tourism Unit on advice from the APY Tourism Committee.

11. Development Strategy

Producing a Strategic Business Plan is vital to managing and implementing tourism development. It will:

- State the guiding vision
- Examine the environment in which that vision is set
- Examine strengths and weaknesses of
- Identify the objectives of development
- Define the actions to be taken to achieve those objectives
- Define the outputs and outcomes to be achieved
- Identify the resources and inputs necessary to secure the outputs and outcomes
- Set the timelines, milestones and performance measures for all actions

A conservative (and proper) view would recommend – as other reports have done – that developing a Strategic Business Plan be made a priority as the next major step.

This report makes the same recommendation but takes a much more radical direction in terms of short-term goal setting. This is felt necessary in the context of:

- The very long delays already experienced in getting organised development in place on a regional basis;
- The difficulty of distilling a coherent and simple response to the weight of evidence and recommended actions already before Anangu in the form of tourism development studies and reports;
- The urgent need for action in terms of local economic need and need for development focus;
- The possible acceleration in the loss of the detailed cultural knowledge that is a vital component of the region's unique appeal as a destination; and
- The need to support those Anangu who have a strong tourism vision.

The immediate outlook for tourism in Australia (and for the remoter regional areas in particular) ranges from pessimistic to grim. Industry experts would probably advise that this is not the time to be launching a new destination (especially one facing so many capacity, infrastructure and other barriers to industry entry). And yet an adventurous and innovative spirit would encourage one to respond by saying that this could well be a period of great opportunity and new and unforeseen market behaviour. It would also say that government and industry response to an industry downturn may well support an adventurous and innovative approach. Industry and government may, in addition, create new funding programs to support innovative development.

With these things in mind, it is recommended here that a Strategic Business Plan be fast-tracked towards a plan that will see:

- APY adopt an “Anangu can do” approach to tourism
- APY establish the resource and expertise base to complete the planning process towards…
- 2010 declared as the APY Year of “Getting Tourism Ready” and the launch of…
- 2011 as the APY Year of “Come to APY Lands” (working title only)

This is a radical approach but will if nothing else accelerate the building of local capacity to develop and service tourism enterprise and the establishment and testing of destination marketing processes.

Crucial elements of this approach would be:

- Establishing a sub-committee of APY to manage the planning process and ensure effective communication with Anangu. Ex-officio membership would be granted to a key representative or representatives of the committee suggested below.
- Establishing a Tourism Development Advisory Committee comprised of key collaborators, most-likely new operators and industry experts. Membership would extend (but not be limited) to: Desert Tracks GM; Diverse Travel; Banksia Tours; Wayward Bus; Wrightsair (and perhaps one other air operator); KU Arts; SA Tourism Commission; Northern Regional Development Board; APY Land Management; and APY. It is likely that this Committee would work on a pro bono basis, with coordination either by APY or an external consultant. It would meet by teleconference.

The latter committee would be responsible for:

- Devising a program of capacity building and education
- Further segmenting and monitoring target markets
- Identifying successful Indigenous tourism destination models
- Translating product ideas into practical product development plans
- Devising a destination marketing plan (including regional identity and content of major materials)
- Liaising with potential collaborators within the industry
- Identifying funding opportunities for APY to address

The coordinator of the committee would draw all outputs into a Strategic Business Plan and subsidiary program aimed at:

- Building the capacity and performance of current activity to a peak in 2011

- Confirming at least two new tour operators to service APY Lands' product
- Confirming at least four new products in 2010
- Securing base infrastructure requirements for 2011
- Launching a destination marketing campaign late 2010 or early 2011

In the experience of consultant K Koch, this approach proposes a similar attitude to that applied to developing the APY Lands art and crafts sector over the past decade. Ten years ago, the sector was considered moribund in terms of its product, its infrastructure and its position in the Aboriginal art market. A determination to turn the sector around – and the application of a regional planning approach through the creation of KU Arts as a development agency – saw it break through a range of barriers. Today, the sector stands at the forefront of artistic achievement nationally, many of the art centres are amongst the strongest in the nation and the regional leadership provided by KU Arts has been widely recognised as a best-practice model. That success has been built not upon infrastructure (which has followed) but upon the unwavering enthusiasm, commitment and adaptability of Anangu.

DECISION POINT: If APY endorses this approach with the presentation of this Draft Report, the consultants will:

- **Test the concept further with proposed participants in the Advisory Committee**
- **If the concept is supported by potential members of the Advisory Committee, proceed to a detailed strategy for implementation and include that in the final report.**

Index to Appendices

Appendix A:

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National Indigenous Tourism Product Manual, Tourism Australia, Sydney 2007

Appendix B:

Snapshots and Regional Tourism Profiles

Appendix C:

Segments Insight Pack, Market Research Intelligence on Aboriginal Tourism, Australian Tourist Commission 2003

Appendix D:

Experience Seekers, Tourism Australia

Appendix E:

Pricing Calculator, SA Tourism Commission

Appendix F:

***National Indigenous Tourism Product Manual*, Tourism Australia, Sydney 2007**

Appendix G: Development Funding Sources

Appendix H:

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