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Aboriginal and Torres Strait Islander tourism enterprise approaches to creating value for visitors in remote Australia

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An Australian Government Initiative



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**Aboriginal and Torres Strait Islander
tourism enterprise approaches to
creating value for visitors in remote Australia**

**Damien Jacobsen
and
Margaret Tiyce**



An Australian Government Initiative



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Glossary

Aboriginal tourism is the sector of enterprises owned or operated by Aboriginal and Torres Strait Islander people that provide cultural products and experiences for visitors.

Business model is the means for an enterprise to conceptualise and understand their development capability, customer needs and target segments and engage in value-creation processes. A business model specifies the match between value creation and consumption to ensure profitability for an enterprise.

Clusters are groups of cooperating enterprises and organisations in particular locations that work together in a manner usually based on some form of structure and aim to achieve a common goal based on productivity and competitiveness.

Clustering is the process of forming and maintaining enterprise and industry clusters.

Competitiveness is understood as the objective to improve the position of an enterprise in their market by implementing business activities that build productivity, create value for customers and maximise profits for the enterprise.

Cooperation involves people working together in mutually beneficial ways to create synergies and opportunities and to develop those opportunities. Cooperation in a value chain is a ‘process by which a network of organisations creates products and services of greater value than those that can be produced on their own’ (Ashkenas et al. 1995).

Critical mass is achieved when related organisations are established within an area or region to create industry density, economies of scale and increased choice for consumers.

Economies of scale are the cost advantages that can be obtained through size, or scale of production or operation. Costs generally decrease and efficiency increases as scale increases.

Innovation is the act of implementing new and improved ideas, processes, products, technologies and so on to meet market, production and/or social needs.

Remote Australia is classified according to the physical road distance to the nearest town or service centre. The geographical area is 86% of the country and it is home to 3% of Australia’s population. There are many diverse settlements, including pastoral, farming, mining, tourism and Aboriginal and Torres Strait Islander communities.

Remote tourism is referred to as tourism in and beyond areas peripheral to urban and regional destinations. This includes travel activity in regions such as remote Australia, where there can be narrow or constrained opportunities for economic activity which is largely a by-product of limited services, infrastructure or industries to support visitation.

Synergies are interactions of elements that produce greater effects combined than they can do separately.

Tourism system involves the actions and interactions of enterprises, attractions, agencies, supporting contexts and infrastructure enabling tourists to travel and visit a destination.

Value is created when products and services are perceived to be worth more than they cost to produce. Value is both created by enterprises in their profit-making production processes and perceived by customers in their buying processes.

Value chain is the whole sequence of value-creating interactions and processes enterprises and industry sectors engage in to produce and deliver products and services to customers. A value chain is also called a supply chain, commodity chain or production chain.

Shortened terms

CRC-REP	Cooperative Research Centre for Remote Economic Participation
SME	Small and medium-sized enterprises

Executive summary

This research report provides an analysis of Aboriginal and Torres Strait Islander remote tourism enterprise approaches to creating value for visitors in remote Australia. This report is part of the Aboriginal and Torres Strait Islander Tourism Product project and was developed by the Cooperative Research Centre for Remote Economic Participation (CRC-REP). The study presented in this report was developed following CRC-REP consultations with Aboriginal and Torres Strait Islander remote tourism sector stakeholders in 2012.

The study involves three main objectives:

- Identify background information such as the products, experiences and challenges of Aboriginal and Torres Strait Islander tourism enterprises in remote Australia
- Map the value-creation configurations of Aboriginal and Torres Strait Islander remote tourism enterprises to detail the processes and practices undertaken in generating value
- Assess industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector.

The study was delivered between November 2013 and February 2014 through an online survey to 72 existing enterprises comprising the majority of the Aboriginal and Torres Strait Islander tourism sector in remote Australia. After e-mail and telephone follow-ups, a 26% response rate was obtained, with further reduction required based on data sufficiency, enabling the study to map configurations of value creation for 17 enterprises.

Key findings: Objective 1

The main background information about Aboriginal and Torres Strait Islander tourism enterprises in remote Australia includes the following:

- More than half of the enterprises in this study have been operating for 7 years or more.
- Enterprise staff profiles: 79% of enterprises have full-time employed staff (average 3 per enterprise); 42% have part-time employees (average 2 per enterprise); 52% of enterprises employ casual staff (average 10 per enterprise).
- More than half of the enterprises in this study are confident that their visitor numbers will increase over the next two years.
- The top five challenges for Aboriginal and Torres Strait Islander remote tourism enterprises in this study are seasonality (87%), followed by ‘high costs of business’ (73%), ‘improving business revenue’ (73%), ‘young generation with low interest to work in tourism’ (67%) and ‘geographic isolation’ (60%).
- The top three external sources of business advice and support are state tourism agencies (72%), consultants (50%) and other Aboriginal and Torres Strait Islander tourism operators (44%).
- The most commonly offered products and experiences include ‘Cultural tour’, ‘Walking tour’, ‘Bush tucker’, ‘Cultural awareness’, ‘Story places’ and ‘Heritage sites’. For the most part, these require comparatively fewer inputs than products and experience that are less common for these enterprises (including ‘Caravan Park’, ‘Eco-lodge/cabins’, ‘Restaurant/café’ and ‘Conference venue’).
- Despite some common features, the overall heterogeneity of products and experiences of the enterprises participating in this study suggests that these entrepreneurs capitalise on a range of locational advantages available in remote Australia.

Key findings: Objective 2

Findings derived from mapping the value-creation configurations of 17 Aboriginal and Torres Strait Islander remote tourism enterprises include:

- Aboriginal and Torres Strait Islander remote tourism enterprises are heterogeneous.
- Product diversification is common among enterprises participating in this study.
- As enterprise cooperation increases, the value-creation processes become more robust.
- The creation of value for visitors appears to be a multi-faceted process for many enterprises participating in this study.
- There is a high level of variability between the value-creation approaches of enterprises participating in this study.
- Enterprises participating in this study draw on a range of cooperation approaches in order to increase value for visitors in remote Australia.
- Combining products and experiences with Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprise is practised by many enterprises participating in this study.
- Product combinations with other Aboriginal and Torres Strait Islander enterprises tend to be related to strengthening a core product/experience theme.
- Product combinations with non-Aboriginal and Torres Strait Islander enterprises are often part of visitor packages.
- Enterprises with highly diversified products and experiences appear just as likely as non-diversified enterprises to combine their products with other operators.
- Enterprises that are uncertain about increasing cooperation appear to be content with existing activity rather than unwilling to be cooperative.

Key findings: Objective 3

The assessment of industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector obtained the following results:

- 87.5% of enterprises in this study engage in enterprise cooperation.
- 92% of enterprises in this study report that cooperation improves the competitiveness of their enterprises in remote Australia.
- 87.5% of enterprises in this study want to increase enterprise cooperation with Aboriginal and/or non-Aboriginal and Torres Strait Islander tourism enterprises.
- Visitor referral is common between Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises in remote Australia; however, there is some concern about reciprocity.
- 73% of enterprises in this study are part of cooperating enterprise groups.
- Cooperating groups of Aboriginal and Torres Strait Islander remote tourism enterprises are established in northern and central Australia, but the extent of activity in other regions is unclear.
- It is more common for operators in this study to be part of non-Aboriginal and Torres Strait Islander enterprise groups.
- While enterprise group leadership is fairly strong, some concerns were raised about the long-term structures and facilitation of those groups.

- 64% of enterprises in this study regularly combine their products and experiences with other enterprises in their region.
- It is more common for Aboriginal and Torres Strait Islander remote tourism enterprises to hold informal rather than scheduled business meetings with other operators in their region.
- Maintaining cultural relationships is important between most Aboriginal and Torres Strait Islander remote tourism enterprises.
- Culture is important for business between most Aboriginal and Torres Strait Islander enterprises, but for some enterprises culture is less of a factor in these relationships.
- Community (Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander) is very important for Aboriginal and Torres Strait Islander remote tourism enterprises.
- There is a great deal of uncertainty in the sector about government support and available training for cooperation between Aboriginal and Torres Strait Islander remote tourism enterprises, but for enterprises with insight into these issues, there is more disagreement than agreement that resources are appropriate.
- The overall view of enterprises in this study is that existing business training and funding schemes need to focus more on the needs of Aboriginal and Torres Strait Islander remote tourism operators.

1. Introduction

Tourism enterprises in remote Australia operate under challenging contexts. These contexts converge from a raft of sources, including the challenges of remoteness; seasonality; practical issues of small to medium-sized enterprises (SMEs); social, cultural and political constraints; fragmented tourism sector; unpredictable markets; and limited infrastructure and critical mass (Jacobsen 2013, Taylor et al. 2008). Moreover, the long distances travelled by many visitors across remote Australia generate additional challenges for operators to determine and deliver appropriate value in enterprises, products and experiences. The strategic opportunities for Aboriginal and Torres Strait Islander remote tourism enterprises within these challenging contexts have received little attention in the literature (Rola-Rubzen 2011, Rola-Rubzen & Ferguson 2009). Indeed, while there have been various studies into Aboriginal cultural enterprises, research has overlooked the position of Aboriginal and Torres Strait Islander remote tourism enterprises in the challenging contexts of remote tourism identified in the literature (Schmallegger et al. 2010). Tremblay (2010) urges the need to pay attention to the diverse capability requirements of Aboriginal and Torres Strait Islander tourism. In particular, research has failed to consider the strategies needed to boost competitiveness of this industry in the challenging contexts of remote Australia.

Improved understanding is needed of Aboriginal and Torres Strait Islander tourism enterprises in remote Australia, particularly their unique business situations and how these enterprises make the most of available resources in remote Australia to create value for their visitors. The competitiveness of contemporary enterprises is as much to do with their external capacities as it is of their internal characteristics (Porter & Kramer 2011). In line with this approach, the present study takes the challenging contexts of remote Australia into consideration by recognising internal and external factors. Creating value for visitors is more than product diversification or comparative advantages; it also includes how enterprises cooperate with other enterprises in their region to coordinate their products and create industry value chain synergies.

The thesis of the present study is that the value-creation strategies of Aboriginal and Torres Strait Islander remote tourism enterprises are embedded within destination tourism systems. This approach requires conceptualising value creation of remote tourism enterprises in an alternative way to traditional value chain production. A value chain involves the complete range of activities that enterprises engage in to deliver products and services (at the greatest profit) to customers (OECD 2008, Porter 1985). Industry value chains, on the other hand, describe the broader range of activities engaged in by industry-related enterprises that, together, produce interconnected products and deliver these to customers (Brown 2001, Kaplinsky & Morris 2001). Industry value chains are cooperative strategic alliances between a group of independent enterprises that through their linkages and interdependencies create improved efficiencies and synergies in their production processes and maximise their competitiveness in the marketplace (Porter 2000). In remote Australia, both internal and external resources need to be maximised, suggesting that in this context enterprise and industry value chains go hand in hand. However, with limited existing studies into this area, the value-creation strategies of Aboriginal and Torres Strait Islander remote tourism enterprises remain unclear.

The purpose of this study is to analyse the value-creation strategies of Aboriginal and Torres Strait Islander enterprises involved in tourism in remote Australia. To achieve this aim, the study identifies value-creation configurations implemented by these enterprises and the activities they undertake to create value for tourists. Mapping these complexities will provide crucial information for understanding the strategic approaches of Aboriginal and Torres Strait Islander enterprises operating in these challenging contexts. This study aims to highlight that the complexities of value-creation processes in remote tourism enterprises

require the adoption of strategies and perspectives appropriate to the contexts of remote Australia. In doing so, the study attempts to point out that local knowledge, Aboriginal and Torres Strait Islander innovation and grass roots solutions can be instrumental to boosting the competitiveness of Aboriginal and Torres Strait Islander remote tourism enterprises.

1.1 Tourism perspectives on chains of value creation

In tourism, different kinds of enterprises are involved in delivering diverse and complementary goods and services to satisfy the needs of tourists. Within any destination region there may be enterprises providing attractions; tours; sightseeing; specialised activities; recreation facilities and resources; natural, cultural and heritage sites; interpretation; accommodation; transport; food and beverages; travel agency services; information services; equipment supplies; motor vehicle services; retail shopping; souvenirs; medical services; media; industry supplies; community services; institutional services; and much more. In fact, any enterprise that provides products or services to tourists may be considered part of the tourism industry (Leiper 2004). Diversity and complementarity of tourism products within a destination region can be key factors in the region's attractiveness to visitors (Michael 2003). Production processes and enterprise value chains are as diverse as the products tourists consume. Authors such as Buhalis (2000) and Morris (2001) maintain that the coordination of destination products and experiences can be critical to competitiveness.

Traditional value chain analyses tend to focus on improving the production processes of an enterprise (e.g. production, technology, design and marketing). Less research has focused on the linkages and interactions between enterprises in an industry sector and/or a geographic region. Yet various sources highlight that this should receive attention since value chain linkages and interdependencies offer opportunity for improved value creation (Ffowcs-Williams 2012, OECD 2008, Porter 2000, Porter & Kramer 2011, Sturgeon 2001). Developing insight to fine-tune linkages between industry value chain enterprises can lead to improved product and service coordination; gains in innovation, productivity and profitability; and greater value for visitors (Bergman et al. 2001; Porter 1985, 2000). The key to productive industry value chains is how participating enterprises interact and cooperate to create value and synergies (Cope 2002, Krugman 1995, Sturgeon, 2001).

1.2 Purpose and objectives of the study

As noted above, there is limited understanding about the value-creation processes of remote Aboriginal and Torres Strait Islander tourism enterprises, how they maximise available resources and integrate within remote destination tourism systems. With this in mind, the purpose of this study was to analyse the value-creation strategies of Aboriginal and Torres Strait Islander enterprises involved in remote tourism. To achieve this, the study investigated industry value chain complexities of Aboriginal and Torres Strait Islander tourism enterprises in remote Australia.

The study was divided into three overall objectives.

Objective 1 Identify the characteristics and contexts of Aboriginal and Torres Strait Islander remote tourism enterprises. This involved highlighting:

- length of operation, sector confidence, employee profile, regional distribution of enterprises across remote Australia and sources of external support
- challenges of operating a tourism enterprise in remote Australia.

Objective 2 Map the value-creation configurations of Aboriginal and Torres Strait Islander remote tourism enterprises. Achieving this objective required identifying:

- products and experiences generated by individual enterprises
- enterprise cooperation activity (including the contribution of cooperation to enterprise competitiveness; meeting activity; marketing and promotion; relationships; and referrals) of Aboriginal and Torres Strait Islander remote tourism enterprises with other operators (including Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises) in their destination region
- industry value chain activity (with Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises), including combining products, group membership, involvement with local community and external support for enterprise cooperation.

Objective 3 Assess industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector. Achieving this objective involved analysing:

- enterprise cooperation activity within the Aboriginal and Torres Strait Islander remote tourism sector with other operators (including Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises) in their destination region (including role of cooperation in competitiveness, meeting activity, marketing and promotion, relationships and referrals)
- industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector (with Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises), including combining products, group membership, involvement with local community and external support for enterprise cooperation.

The literature reviewed in preparation for this study is contained in two separate publications. The first, *Building value in Aboriginal and Torres Strait Islander tourism enterprises in remote Australia: The role of cooperation and clustering* (Jacobsen & Tiyce 2014), reviews value-creation literature (including industry value chains, enterprise cooperation and clustering) in relation to Aboriginal and Torres Strait Islander remote tourism. The second, *Building knowledge for Aboriginal and Torres Strait Islander remote tourism: lessons from comparable tourism initiatives around the world* (Jacobsen 2013), explores the remote tourism contexts, challenges and enterprises of people Indigenous to remote regions throughout the world. This publication provides the foundation for the remote tourism challenges assessed in the present study.

This study is part of the Aboriginal and Torres Strait Islander Tourism Product project and was developed by the Cooperative Research Centre for Remote Economic Participation (CRC-REP). This study was developed following CRC-REP consultations with remote tourism sector stakeholders in 2012. It is consistent with the project aim of delivering appropriate outcomes that build the strategic capacity of remote Aboriginal and Torres Strait Islander people involved in tourism. This project is part of the CRC-REP efforts to address ways that Aboriginal and Torres Strait Islander enterprises can adapt to remain resilient in the challenging contexts and restricted tourism market environments of remote Australia. Increasing enterprise resilience in remote tourism requires boosting knowledge about local innovation, maximising available resources, using market-driven business models and creating opportunities out of challenging contexts.

1.3 Structure of the report

There are six chapters in this research report. Chapter 1 provides a background to the research, explaining the rationale for the study, aims and objectives. Chapter 2 outlines the research design, and is followed by the study findings presented in Chapters 3, 4 and 5. Chapter 3 identifies the background of study participants, Chapter 4 maps value creation in a number of Aboriginal and Torres Strait Islander remote tourism enterprises, and Chapter 5 conducts an Aboriginal and Torres Strait Islander remote tourism industry value chain assessment. Each of these three chapters concludes with a short summary of key findings emerging from the results. Chapter 6 then provides some general concluding comments.

2. Research design

This chapter outlines the research methods, data sources and data collection methods. It also explains how the data were analysed and outlines limitations of the study.

2.1 Context of the study: remote Australia

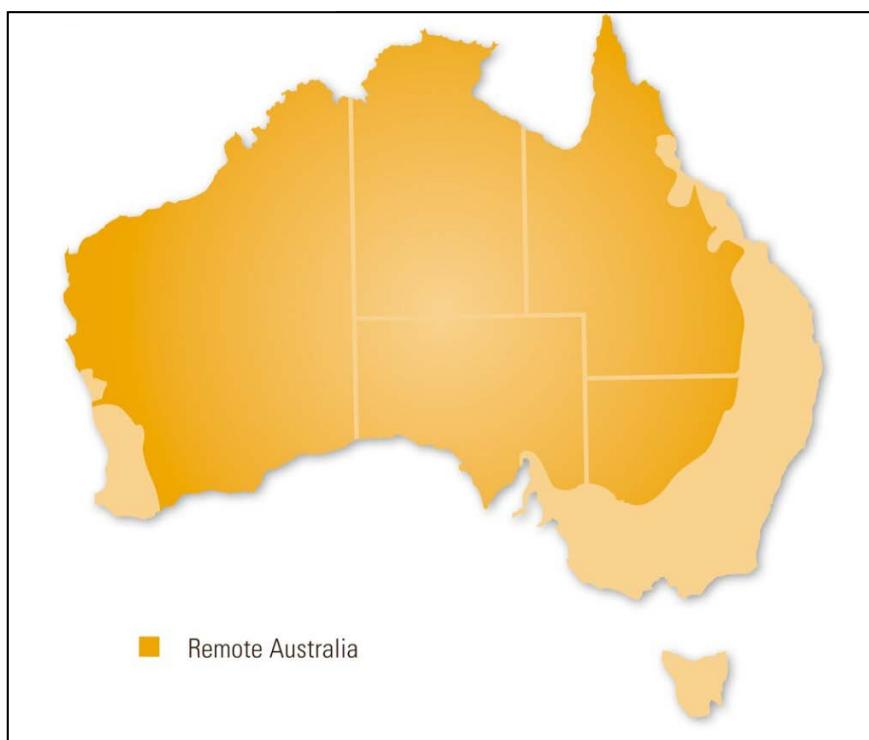


Figure 1: Remote Australia

This study covered the areas classified as ‘remote’ and ‘very remote’ under the Australian Standard Geographical Classification (ASGC) categories. The Australian Bureau of Statistics uses this classification system to collect and disseminate geographically classified statistics.

Remote Australia covers around 86% of the country and is home to 3% of Australia’s population. It crosses a spectrum of environments from arid to semi-arid rangelands, to rainforests and isolated coastal zones of the tropical north, to islands such as Tiwi and the various communities of the Torres Strait (see Figure 1).

Remote Australia is distant from centres of economic and political decision-making. In general, people who live in remote Australia have lower incomes, employment rates and education levels than the rest of Australia. There are many diverse settlements, including pastoral, farming, mining, tourism and Aboriginal and Torres Strait Islander communities. Aboriginal and Torres Strait Islander people, the world's oldest living culture, are 48% of the total population in very remote areas, and ~15% of the population living in remote areas. A quarter of all Aboriginal and Torres Strait Islander people in Australia live in remote or very remote areas compared to 2% for non-Aboriginal and Torres Strait Islander people. Remote Australia contributes around \$90 billion to Australian export (45% export earnings). There are 40,000 SMEs, which is 1.5 times more per capita than the national average (CRC-REP 2014).

2.2 Data sources

The research involved gathering primary data from Aboriginal and Torres Strait Islander tourism enterprises operating across remote Australia. A database of Aboriginal and Torres Strait Islander tourism enterprises was compiled from remote regions of Western Australia, Northern Territory, Queensland (including the Torres Strait Islands), South Australia, New South Wales and Victoria. In all, 72 Aboriginal and Torres Strait Islander enterprises involved in tourism in remote Australia were identified as potential study participants. These enterprises were considered to comprise the majority of the Aboriginal and Torres Strait Islander remote tourism sector in Australia.

Before data collection was carried out, an ethics application outlining the study aims and methods was approved by Southern Cross University Human Research Ethics Committee.

2.3 Data collection

The study used a structured survey that sought information about the value-creation activities of each enterprise. The survey was based on Jackson and Murphy's (2006) work on tourism enterprise clustering in regional Australia, as well as the enterprise cooperation theory of Porter (1998, 2000). The approaches of these existing studies highlight that value creation between cooperating enterprises takes various forms and requires certain structures. More specifically, data sought included:

- the characteristics of the enterprise (including the type of tourism products offered, the location of the enterprise, enterprise size and structure, number of employees)
- challenges of operating a tourism enterprise in remote Australia
- how each enterprise creates and/or adds value to their products and services
- enterprise cooperation (including marketing and promotion) with other tourism operators (including Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander operators)
- meeting activity (including informal and scheduled business meetings)
- industry value chains (such as combining products with other enterprises in their region)
- involvement with groups of cooperating enterprises
- relationships (including cultural and community involvement)
- external support for Aboriginal and Torres Strait Islander remote tourism enterprises and cooperation between those enterprises.

The survey primarily used 5-point Likert scales to assess the various items noted above. Open-ended questions were also used to assess respondent perspectives on particular issues. The survey was designed

to assess the breadth and complexity of value-creation possibilities for Aboriginal and Torres Strait Islander tourism enterprises, including their efforts to maximise available resources in their region. Consistent with Porter (1998, 2000), the survey also recognised other ingredients of enterprise cooperation such as facilitating structures and support.

In November 2013, the 72 enterprises were sent an e-mail invitation to take part in the study via the online research software tool Survey Monkey. A survey link was provided in the e-mail along with information on the study and the ethical parameters of the research. The online survey was structured to group participants according to their initial responses. It began by requesting background information; participants then moved to the next section that opened with a 'yes/no' question. If a participant answered 'no' to this question, the follow-up questions in that section were skipped. If a participant answered 'yes' to the opening question the survey was programmed to ensure these participants did not skip the follow-up questions in the section. It is important to note that this approach does lead to variability in the number of respondents for some survey questions. This format was repeated in the third section of the survey.

Follow-ups were undertaken in recognition of the everyday practical challenges of Aboriginal and Torres Strait Islander remote tourism enterprises. As Taylor et al. (2008) have highlighted, many of these operators are often so busy just surviving that it may be difficult to participate in research studies. In addition, the data collection approach recognised that the hot and wet period from October to March is the tourism off-season for many enterprises throughout remote Australia, particularly in the north. In southern, as well as many central areas, the heat is a particular deterrent for visitors during this season. At this time, telecommunications in much of remote Australia can be limited due to storms or flooding, and many Aboriginal people also use this time of year to engage in cultural business. These circumstances required that follow-up prompts were needed to ensure potential participants had adequate opportunity to participate in the study. The first follow-up was an e-mail alert at two weeks, and then again six weeks after the initial study invitations were distributed. Finally, telephone follow-ups were performed eight weeks after the initial study invitation.

2.4 Data analysis

The data collected in the survey were analysed using both quantitative and qualitative data analysis techniques. The quantitative analysis utilised Excel software to generate descriptive statistics. This identified key characteristics of each enterprise and their value-creation processes. While parametric tests may be applied to the data generated in this study (Norman 2010), trends in the overall sample evident in data collection (noted in the limitations below) raised concern over the distribution of the sample across the entire Aboriginal and Torres Strait Islander remote tourism enterprise population. Numerical and graphical data summaries are used in this report to present this analysis.

Qualitative analysis was used to gain insights into value-creation issues and how these might be improved. Qualitative thematic analysis of participants' perspectives, concerns and suggestions for improved efficiencies and synergies of value chain processes added a richness of understanding to the quantitative findings. Together, these approaches highlighted key areas where improvements might be achieved.

2.5 Limitations of the study

This study is limited to the relatively small number of participants who took part. While there was a 26% response rate (19/72) the findings should not be generalised to all Aboriginal and Torres Strait Islander tourism enterprises in remote Australia. The rationale for not performing further statistical analysis was due to the sample: in particular, there may have been a trend for respondents who did participate in the present study to have pre-existing views in favour of enterprise cooperation; this possibility was raised in the telephone follow-ups with some operators. Other operators felt that the study did not apply to them because their enterprise was too small or they did not engage in cooperative activity. Such operators could have provided important insights to the present study, but they declined to participate. Nevertheless, the participants taking part provided insights into the value-creation complexities for their enterprises in remote Australia.

The richness of value-creation processes (particularly in relation to detailed value chains and detailed industry value chain data) were beyond the scope of the study. For example, while data were collected about meetings between enterprises (an important aspect of industry value chain participation), this may only indicate opportunity for information exchange, not the actual forms of information exchanged at meetings. Likewise, this study collected data about approaches to creating value for visitors, but detailed resource input data crucial to traditional value chain analysis was beyond the scope. This study sheds light on the treatment of value creation for Aboriginal and Torres Strait Islander remote tourism enterprises, and therefore paves the way to identify appropriate conceptualisations to inform future inquiry.

3. Background of study participants

3.1 Study participants' tourism regions of origin in remote Australia

A total of 19 respondents participated in the study, made up of business owners, managers and staff of Aboriginal and Torres Strait Islander tourism enterprises located in remote Australia. The enterprises that participated in the study are distributed throughout remote Australia, including Outback New South Wales, Tropical North Queensland, Kakadu Arnhem, Katherine Daly, Tableland (NT), MacDonnell, Alice Springs, Australia's North West and Australia's Golden Outback. The source regions of study participants are identified in Figure 2.

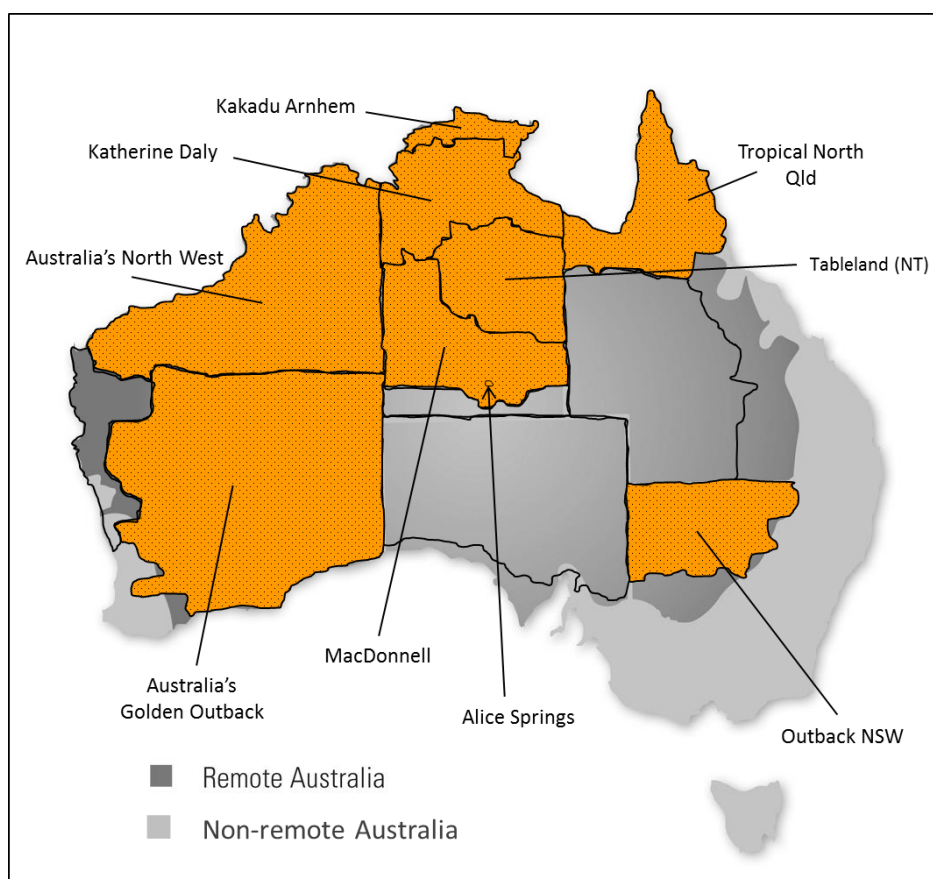


Figure 2: Source regions of study participants

Of the 19 enterprises participating in the study, 17 enterprises provided sufficient data to generate a usable description of value creation for their enterprise. These are presented in Sections 4.1 to 4.17.

3.2 Years in operation

Figure 3 highlights that the majority of the sample comprised Aboriginal and Torres Strait Islander remote tourism enterprises that have been operating for more than 7 years (approx. 55%). The years of operation for the remainder of the sample were between less than 1 year and up to 6 years.

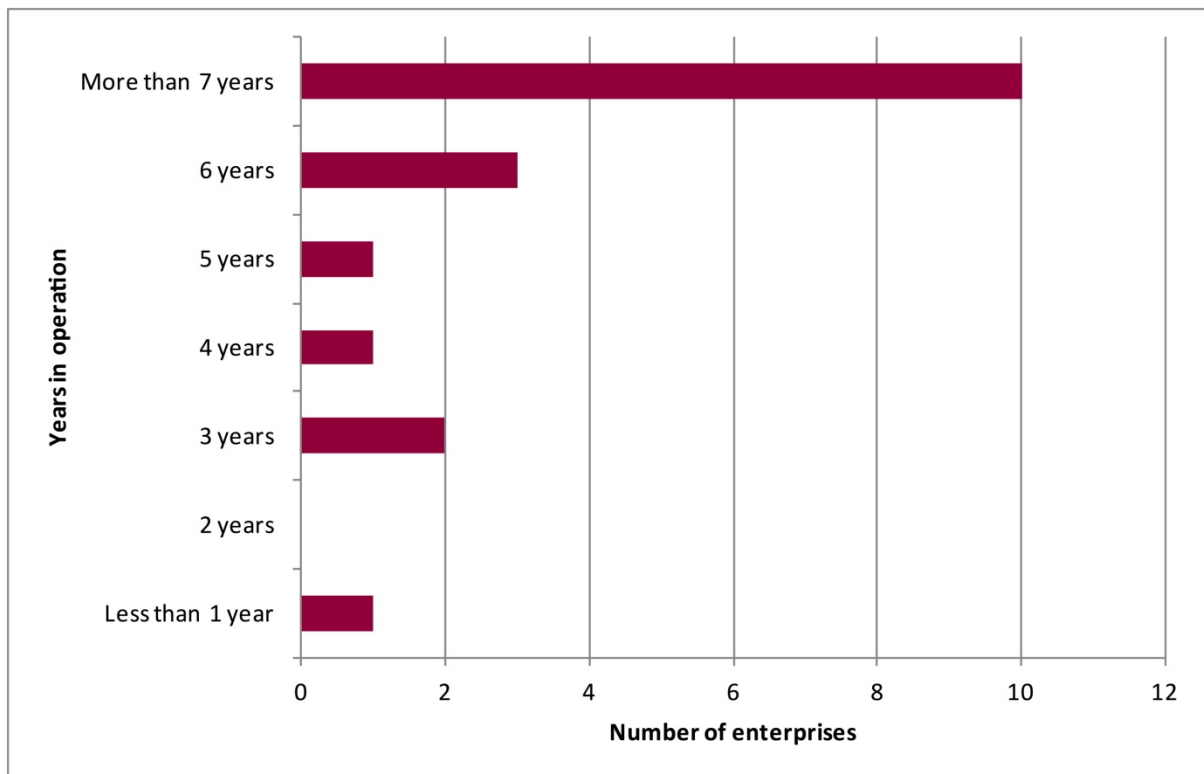


Figure 3: Aboriginal and Torres Strait Islander remote tourism enterprises: years of operation

3.3 Employment

Table 1 shows how many employees the enterprises in the study had. Not all operators had full-time employed staff, but among those that did the average was 3 full-time employees per enterprise. While just over half of the sample employed casual staff, casual staff made up the greatest number of employees in the sample overall. However, it is important to note that one operator accounted for 50 casual employees, showing that there was a large range of organisation sizes in the sample.

Table 1: Employment by type

	Average	Total	Responses
Full-time employed	3	39	15
Part-time employed	2	15	8
Casual	10	96	10
Volunteer	3	15	6
Other (e.g. student, contractor)	2	6	4

3.4 Sector confidence

Study participants were asked to identify the expected trend in visitor numbers to their enterprise in the next two years. Table 2 shows that more than half of the sample expects an increase in visitor numbers to their enterprise in this timeframe, and almost a quarter of respondents expected that visitor numbers would remain steady, showing an encouraging level of confidence in visitation over the next two years from the study participants.

Table 2: Enterprise confidence in visitor numbers over the next two years

Expected trend	% of sample
Decrease	5.56
Remain steady	22.22
Increase	55.56
Unsure	16.67
I chose not to answer	0

3.5 Challenges of operating in remote Australia

Study participants were asked to identify challenges experienced by their enterprise in remote Australia. As shown in Table 3, no study participants stated that their enterprise did not face any challenges, but the large range of challenges noted by study participants highlights the complexity of challenging contexts faced by Aboriginal and Torres Strait Islander tourism enterprises in remote Australia. The most common challenge experienced by operators was seasonality (87%), followed by high costs of business (73%) and improving business revenue (73%). Challenges such as these may be implicated in enterprise competitiveness and long-term resilience. Not surprisingly, geographic isolation was commonly identified (60%). A high proportion of respondents (67%) also identified that the challenge of a young generation with low interest to work in tourism was relevant for their enterprise. Other human resource issues (building business capacity and accessing skilled labour) were also cited by 53% of the sample. While 47% of the sample indicated that lack of infrastructure was a challenge, this issue can mean many different things. As one respondent said:

Lack of adequate housing, transport, power, bad roads, and other infrastructure in the places where businesses operate (this is often far away from town) means it is hard to get people to work with you and hard for them to work well. You can't expect people to sleep rough when they work for you. Workers need a good night's sleep.

This comment shows that challenging contexts can be interrelated, so that some issues can contribute to and exacerbate other challenges.

Table 3: Aboriginal and Torres Strait Islander remote tourism enterprise challenges

Challenges of Aboriginal and Torres Strait Islander remote tourism enterprises (n = 15)			
Challenge	% of sample	Challenge	% of sample
My enterprise does not have any challenges	0	Need for long-term strategies	33%
Seasonality	87%	Poor destination brand/image	27%
High costs of business	73%	Overcoming a troubled past	27%
Improving business revenue	73%	Fragile ecosystem	20%
Young generation with low interest to work in tourism	67%	Issues of land tenure	13%
Geographic isolation	60%	Reliance on agencies and organisations outside your region	13%
Building business capacity	53%	Accessing expertise and innovation	13%
Accessing skilled labour	53%	Lack of experiences for visitors	13%
Lack of infrastructure	47%	Obligation to your community	13%
Legislation and government issues	40%	Internal politics	13%
Accessing visitor markets	33%	Loss of traditional ways	7%
Improving competitiveness	33%	Dealing with mining industries and other resource users	0
Dealing with multiple authorities	20%		

Issues such as dealing with mining industries & other resource users (0%), loss of traditional ways (7%), accessing expertise & innovation (13%), reliance on agencies and organisations outside your region (13%), obligation to your community (13%) and lack of experiences for visitors (13%) were concerns for small proportions of respondents. Other less frequently cited challenges were issues of land tenure (13%), internal politics (13%) and poor destination brand/image (27%). Overall, while some issues are more common than others, it appears that enterprises participating in this study highlight many localised complexities that differ from one region to the next. Discussions about the challenges for remote tourism enterprises need to be cautious to ensure that these complexities are taken into consideration.

3.6 External sources of business advice and support

The remote Aboriginal and Torres Strait Islander tourism operators participating in this study sought business advice and development support from a range of external sources (listed in Table 4). The importance of external support was highlighted by one respondent who noted a shortfall and difficulty accessing appropriate and useful information. This person said:

In a region such as ours, it is important to have good industry support. It is harder for a new and small enterprise such as ours. We cannot move forward without regional encouragement and support.

Table 4: External business advice and support

External source of advice and support	% of sample (n=18)
State tourism agency	72%
Consultant	50%
Aboriginal tourism enterprise in your region	44%
Local government	28%
Aboriginal economic development agency	28%
Non-Aboriginal tourism enterprise in your region	28%
Federal tourism agency	28%
Government non-tourism agency	16%
Land council	11%
University	5%
Aboriginal tourism agency	5%
Charity organisation	0%
The enterprise has not received any business advice or support	5%

The most common external support providers are state tourism agencies, which were used by 72% of the sample. The next most important sources were consultants (50%) and other Aboriginal and Torres Strait Islander tourism operators in their regions (44%). Just over one quarter (28%) of operators received support from a federal tourism agency, but just 5% received business advice or development support from a University. The reasons respondents accessed this range of support were not detailed.

External support needs to be appropriate to operators' evolving needs. Some respondents commented that external support can become constraining. This motivated the following respondent to be more independent in their 'learning by doing' approach:

When we started out ... we received a lot of advice from many people. After 4 years of this, we decided that we wanted to make our own decisions regarding our business and not be told what to do. We wanted to know where we made mistakes and learn through trial and error.

As Table 4 shows, only 5% of study participants stated that their enterprise has not received any external business advice or support. While this implies that such enterprises seek independence, it does not suggest that enterprises who receive external business advice or support do not make strategic or business decisions independently. The nature and terms of external support were not investigated in this study.

3.7 Products and experiences

Table 5 provides an overview of the range of products and experiences offered by the Aboriginal and Torres Strait Islander remote tourism enterprises that participated in the study. It shows that the diversity of products and experiences is broad, indicating that these enterprises are involved in many different components of destination tourism systems. The majority of study participants indicated that their enterprise offers more than one product or experience to visitors. The actual product diversification of each enterprise is presented in sections 4.1–4.17.

Table 5: Aboriginal and Torres Strait Islander remote tourism enterprise products and experiences

Product or experience	% of sample	Product or experience	% of sample
Cultural tour	77%	Catering	28%
Bush tucker	61%	Wildlife viewing	28%
Walking tour	50%	Information centre	22%
Cultural awareness	50%	Cave tours	17%
Story places	45%	Art/artefact making	17%
Heritage sites	45%	Caravan park	17%
Special interest tours (e.g. art)	45%	Eco-lodge/cabins	11%
4WD tour	45%	Event (e.g. festival)	11%
Art sites	45%	Fishing tour	11%
Campground	39%	Restaurant/café	11%
Art gallery/souvenir shop	39%	4WD trails	11%
Adventure	39%	Marketing agency	5%
Walking track	33%	Regional tourism development	5%
Workshop (e.g. music)	28%	Conference venue	5%

Other products or experiences (not listed in Table 5) offered by some operators include short excursions for cruise ship passengers, horse riding, billy tea and damper, and a general store. The most commonly offered products and experiences (e.g. Cultural tour, Walking tour, Bush tucker, Cultural awareness, Story places, Heritage sites) require human, cultural and natural resources. For the most part, these products and experiences require fewer resource inputs than less commonly offered elements such as a Caravan park, Eco-lodge/cabins, Restaurant/café or Conference venue. Value chain configurations will differ depending on the resource requirements of each product or experience, showing that there is diversity in value chain considerations and heterogeneity between the value-creating processes practised by the enterprises participating in this study.

Table 5 shows that while some products and experiences are common to numerous Aboriginal and Torres Strait Islander remote tourism enterprises, some operators act on unique opportunities in their region (e.g. fishing tours, events, marketing agency, conference venue and caravan parks).

3.8 Additional value adding

Of the study participants, 84% provide value-adding extras for their visitors. Many of their additional value-adding items are identified in the points below. Extras largely comprise steps to strengthen existing experiences (e.g. Local guide, Seasonal bush food, Personalised interaction, Behind-the-scenes access), extra services (e.g. Transfers), discounts and souvenirs. These extras incur varying costs, with some more expensive than others, but illustrate the creativity that enterprises use to increase value for their visitors.

Extra value offered by Aboriginal and Torres Strait Islander remote tourism enterprises

- Pre-departure kit
- Local guide
- Privileged access to sites
- Transfers (airport, etc.)
- Campfire yarning
- Seasonal bush food
- Barbeque facilities
- Take home packs
- General information
- Personalised interaction
- Repeat visitor discount
- Home cooking
- Free souvenir
- Behind-the-scenes access
- Group discount

3.9 Background of study participants: key findings in brief

Key findings about the characteristics and contexts of Aboriginal and Torres Strait Islander remote tourism enterprises that participated in the study are that:

- they are distributed in regions throughout remote Australia
- more than half have been operating for 7 years or more
- 79% have full-time employed staff (average of 3 per enterprise); 42% have part-time employees (average of 2 per enterprise); 52% employ casual staff (average of 10 per enterprise)
- more than half are confident that their visitor numbers will increase over the next two years
- the top 5 challenges are seasonality (87%), followed by high costs of business (73%), improving business revenue (73%), young generation with low interest to work in tourism (67%) and geographic isolation (60%)
- they contend with a range of localised complexities as well as challenges common throughout remote Australia
- the top 3 external sources of business advice and support are state tourism agencies (72%), consultants (50%) and other Aboriginal and Torres Strait Islander tourism operators (44%)
- the most commonly offered products and experiences include Cultural tour, Walking tour, Bush tucker, Cultural awareness, Story places and Heritage sites. For the most part, these require comparatively fewer inputs than products and experience that are less common for these enterprises (including Caravan park, Eco-lodge/cabins, Restaurant/café and Conference venue)

- the overall heterogeneity between products and experiences of the enterprises – despite some common features – suggests that these entrepreneurs capitalise on a range of locational advantages available in remote Australia.

4. Value creation in Aboriginal and Torres Strait Islander remote tourism enterprises

This section maps the configuration of value creation by the Aboriginal and Torres Strait Islander remote tourism enterprises in the study. As noted in Section 3.1, 17 out of the 19 enterprises that participated in the study are presented. Findings for each enterprise cover industry value chain participation with other Aboriginal and Torres Strait Islander enterprises and with non-Aboriginal and Torres Strait Islander enterprises.

4.1 Enterprise 1

4.1.1 Value creation within the enterprise

Enterprise 1 is located in Tropical North Queensland (see Figure 2), and a configuration of their value-creation processes is provided in Figure 4. Products and experiences are Cultural tours, Walking tours, Special interest tours, Bush tucker, Heritage sites, Story places, Walking tracks, Festival/event and an Information centre. Enterprise 1 also adds value by providing seasonal bush foods, cultural resources, an information booklet and discounts for large bookings.

4.1.2 Industry value chain participation

4.1.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 1 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, with the strength of this cooperation described as fair. Cooperation is not important for the competitiveness of their enterprise, but they do consider that it is important to marketing and promotion. This enterprise is not a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region, but they would like their level of cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 1 does not combine products or experiences provided by other Aboriginal and Torres Strait Islander enterprises in their region. Nevertheless, it does refer their customers on to other Aboriginal and Torres Strait Islander tourism operators in their region, once a week or more, but other Aboriginal and Torres Strait Islander tourism operators in their region never refer visitors to their enterprise.

Meeting activity

This enterprise does not engage in scheduled business meetings or regularly meet informally with other Aboriginal and Torres Strait Islander tourism operators.

Importance of cultural relationships

For Enterprise 1, maintaining cultural relationships with other Aboriginal and Torres Strait Islander tourism operators is important, in both their informal and business relationships.

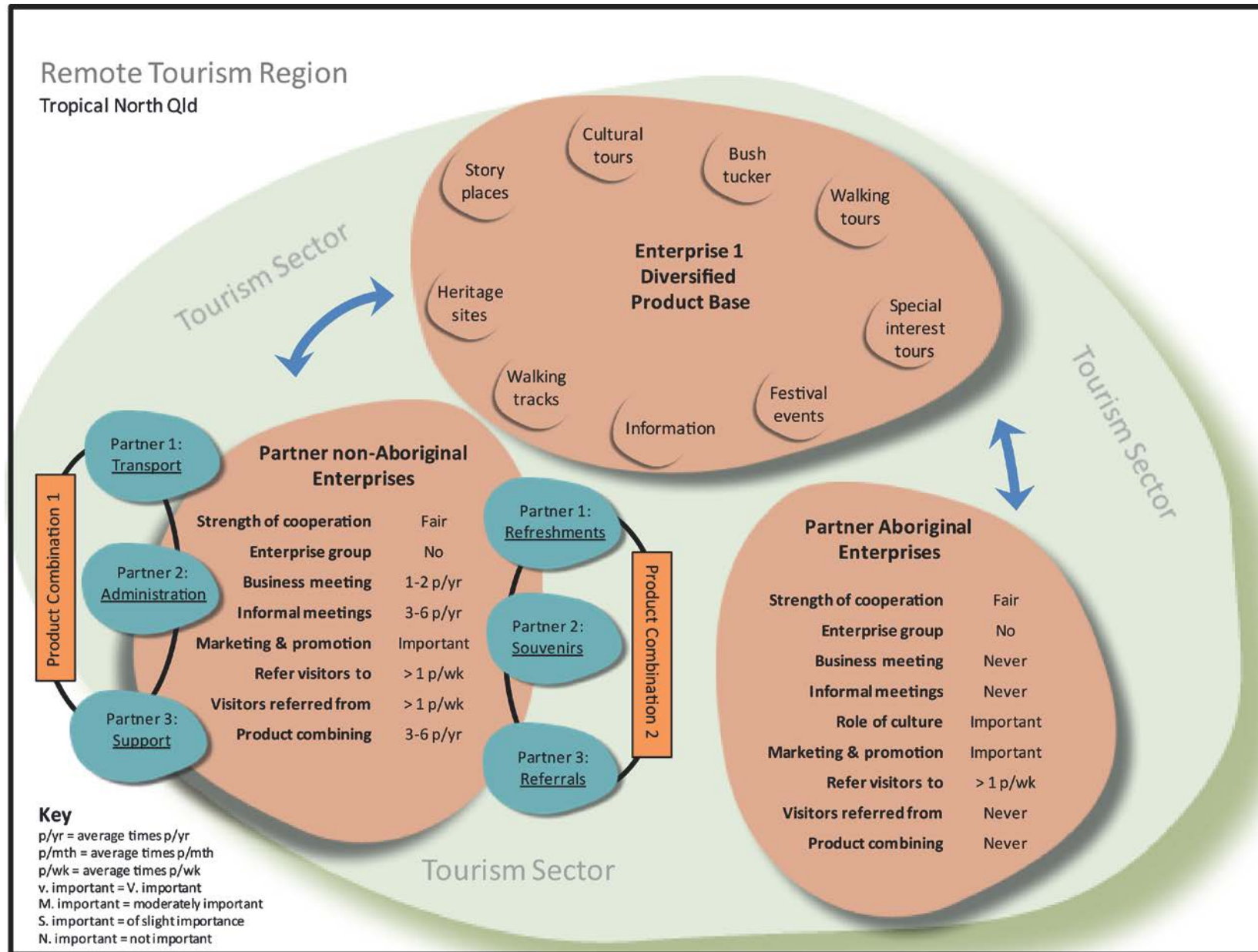


Figure 4: Value creation by Enterprise 1

4.1.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 1 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of this engagement is fair. This activity is very important for the competitiveness of their enterprise and is important to marketing and promotion. This enterprise is not a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region. They would like to increase their existing level of cooperation.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 1 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises between three and six times a year. One combination involves a cultural historical tour that includes administrative services provided by one operator, transport provided by another operator, and research and support provided by a third enterprise. A second product combination involves storytelling that includes referrals from one enterprise, souvenirs from another, and refreshments provided by a third enterprise. The enterprise also refers visitor to non-Aboriginal and Torres Strait Islander tourism operators once a week or more, the same rate that non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

Enterprise 1 engages in scheduled business meetings with non-Aboriginal and Torres Strait Islander operators one to two times a year and meets informally three to six times a year. Separation between business and informal meetings is considered to be important.

4.2 Enterprise 2

4.2.1 Value creation within the enterprise

Enterprise 2 is located in the Kakadu Arnhem region in the Northern Territory (see Figure 2). Figure 5 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Bush tucker, Art sites, Heritage sites, Special interest tours, Wildlife viewing, Cultural awareness activities, Workshops, Art/artefact making, an Art gallery/souvenir shop, Visitor catering and a Campground. As well as this range of product offerings, this enterprise also creates added value for visitors by providing all-inclusive cultural experiences (comprising transport, meals and accommodation) on remote outstations.

4.2.2 Industry value chain participation

4.2.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 2 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and this cooperation is very strong. Cooperation is very important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is not part of a group of cooperating Aboriginal and Torres Strait Islander enterprises, but they would like their existing level of cooperation to increase.

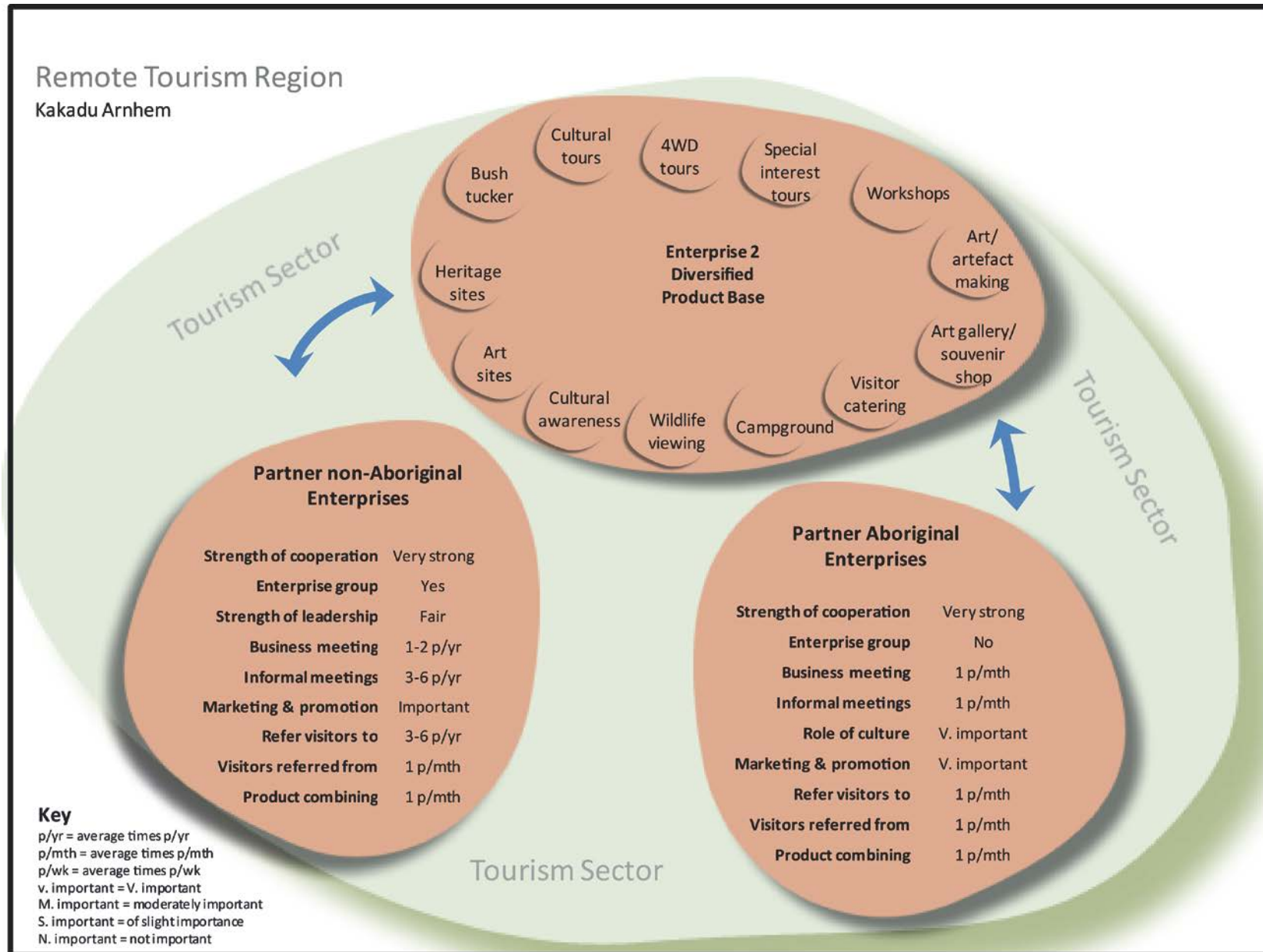


Figure 5: Value creation by Enterprise 2

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 2 combines with products or experiences provided by other Aboriginal and Torres Strait Islander enterprises in their region an average of once a month, but these were not specified. Referral of customers to other Aboriginal and Torres Strait Islander tourism operators in their region occurs about once a month, a similar rate that other Aboriginal and Torres Strait Islander tourism operators in their region refer visitors to their enterprise.

Meeting activity

This enterprise holds scheduled business meetings and has informal meetings with other Aboriginal and Torres Strait Islander tourism operators in their region an average of once a month. Separation between these informal and business meetings is moderately important.

Importance of cultural relationships

For this operator, it is very important to maintain a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region, which is very important in building their informal and business relationships.

4.2.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 2 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. This cooperation is very important for the competitiveness of their enterprise and important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of leadership of this group was rated as fair. This operator would like to increase their existing level of cooperation.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 2 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises an average of once a month, but these combinations were not specified. The enterprise also refers their customers to non-Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year, while non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once a month.

Meeting activity

Scheduled business meetings are held with non-Aboriginal and Torres Strait Islander operators one to two times a year on average, and operators meet informally three to six times a year. Separation between these business and informal meetings is moderately important.

4.3 Enterprise 3

4.3.1 Value creation within the enterprise

Enterprise 3 is located in Australia's North West tourism region of Western Australia (see Figure 2). Figure 6 provides a configuration of their value-creation processes. Tourism products and experiences offered to visitors include Cultural tours, Four-wheel-drive tours, Special interest tours, Cave tours, Walking tours, Bush tucker, Art sites, Heritage sites, Cultural awareness activities, Story places, a Restaurant/café and Accommodation. This enterprise provides a diverse array of experiences for visitors

and creates added value through their privileged access to rock art sites and their unique interpretation and education experiences. On a service level, they also provide transfers for their guests.

4.3.2 Industry value chain participation

4.3.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 3 does not cooperate with other Aboriginal and Torres Strait Islander enterprises in their region, but they would like cooperation to begin.

4.3.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 3 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of this cooperation as strong. This cooperation is important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is not a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region, but they would like their cooperation activity to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 3 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region an average of once a week or more. One combination involves a rock art and cultural tour where the value-adding products provided by non-Aboriginal and Torres Strait Islander enterprises include cruises and sea plane transfers. A second combination involves accommodation that includes advice and referrals from non-Aboriginal and Torres Strait Islander enterprises in the region. The enterprise refers their visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year, while non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once month or more.

Meeting activity

Enterprise 3 does not hold scheduled business meetings, but meets informally three to six times a year with non-Aboriginal and Torres Strait Islander operators in their region.

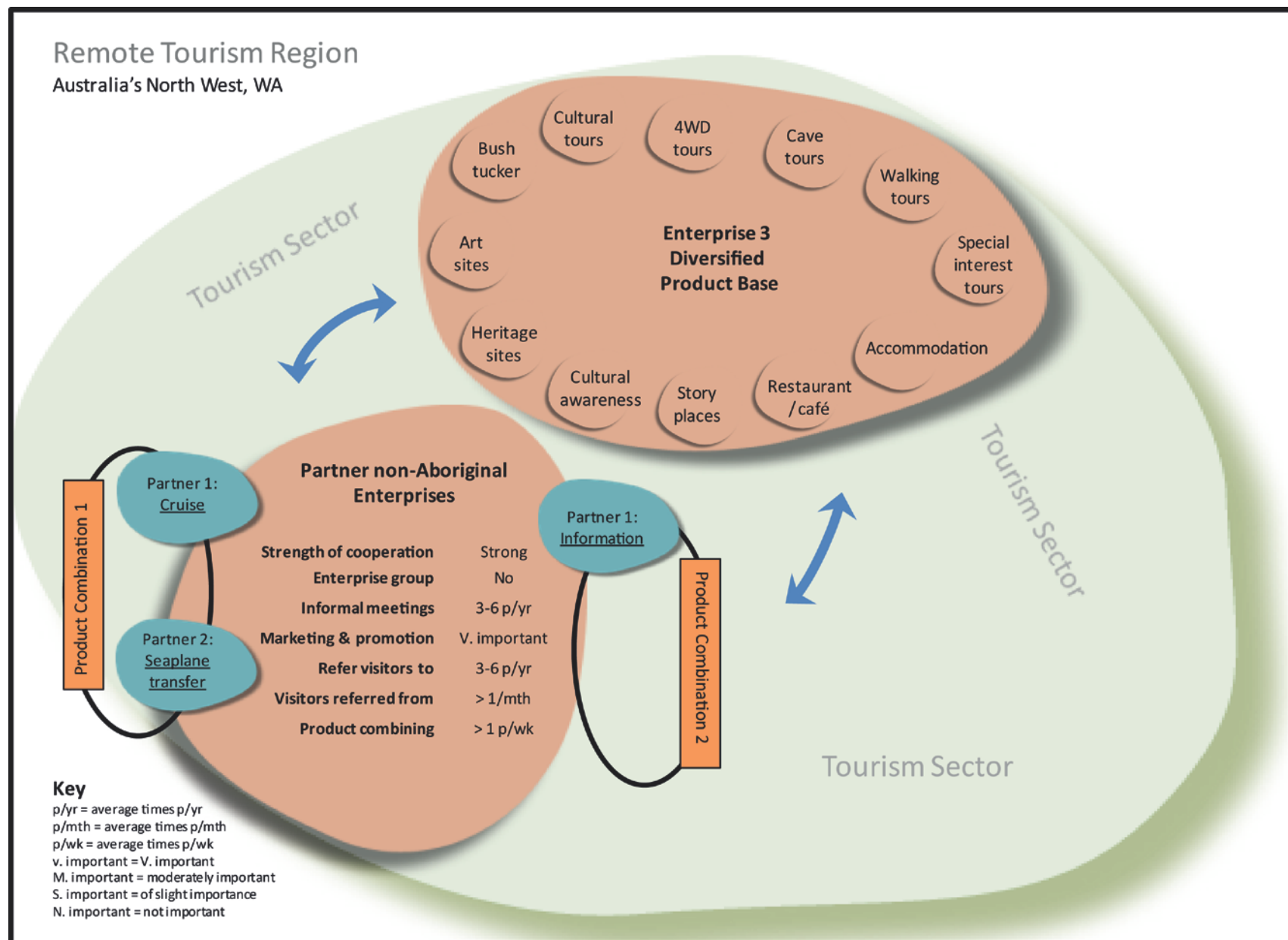


Figure 6: Value creation by Enterprise 3

4.4 Enterprise 4

4.4.1 Value creation within the enterprise

Enterprise 4 is located in the Kakadu Arnhem region of the Northern Territory (see Figure 2). A configuration of their value-creation processes is provided in Figure 7. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours and trails, Special interest tours, Walking tours, Art sites, Heritage sites, Cultural awareness activities, Adventure, Story places and an Art gallery/souvenir shop. As well as providing an array of products and experiences for their customers, this enterprise provides added value through packaged products and tours, discounts for groups, transfers from cruise ships, helicopter flyovers and local Aboriginal guides and storytelling. They also create added value for customers through the many links they provide with other Aboriginal operators and products.

4.4.2 Industry value chain participation

4.4.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 4 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is fair. Cooperation is moderately important for the competitiveness of their enterprise and important for marketing and promotion. The enterprise is part of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region, and the leadership of this group is fair. Increasing this cooperation is something they would like to do.

Combining products with other Aboriginal and Torres Strait Islander enterprises

One to two times per year, Enterprise 4 combines products provided by other Aboriginal and Torres Strait Islander enterprises in their region. The enterprise refers their customers to other Aboriginal and Torres Strait Islander tourism operators once a week or more, while other Aboriginal and Torres Strait Islander tourism operators in their region referred visitors to their enterprise an average of once a month.

Meeting activity

Enterprise 4 engages in scheduled business meetings one to two times a year with other Aboriginal and Torres Strait Islander tourism operators in their region. They also meet informally with these operators an average three to six times a year.

Importance of cultural relationships

For this enterprise, maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in the region is moderately important, in both their informal and business relationships.

4.4.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 4 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is strong. This activity is very important for the competitiveness of their enterprise and is important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises, and they rate the leadership of this group as fair. The operator would like their cooperation to increase.

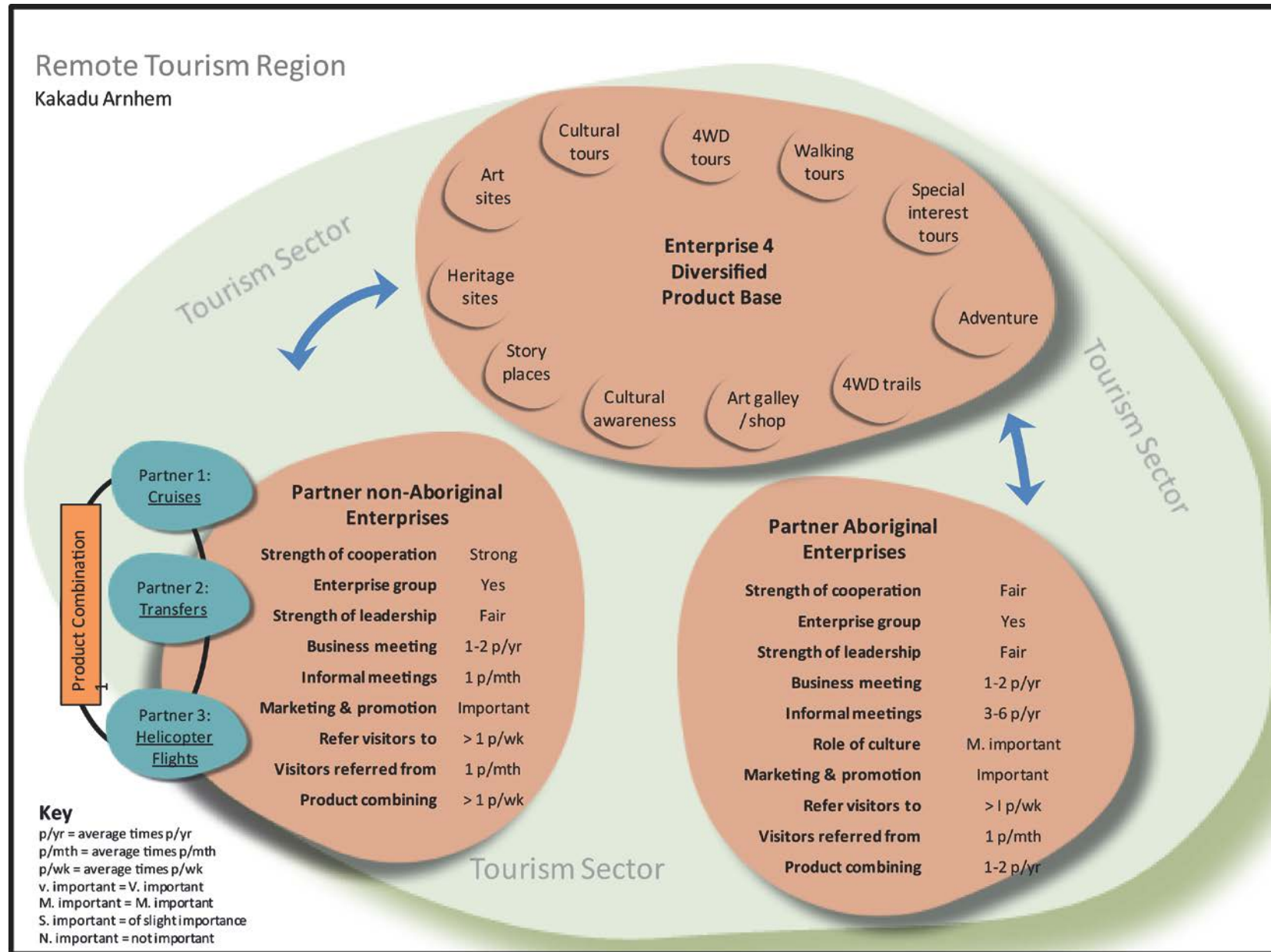


Figure 7: Value creation by Enterprise 4

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 4 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region around once a week or more. One combination involves an Aboriginal tour of a national park that includes experiences provided by non-Aboriginal and Torres Strait Islander enterprises in the form of a cruise, transfers and helicopter flights. Additionally, once a week or more Enterprise 4 refers their visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region, while non-Aboriginal and Torres Strait Islander operators refer visitors to their enterprise around once a month.

Meeting activity

Enterprise 4 holds scheduled business meetings with non-Aboriginal and Torres Strait Islander operators one to two times a year and meets informally once a month. Separation between business and informal meetings is of slight importance.

4.5 Enterprise 5

4.5.1 Value creation within the enterprise

Enterprise 5 is located in the Katherine Daly region of the Northern Territory (see Figure 2). Figure 8 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Cultural awareness activities, Workshops, Wildlife interactions, an Art gallery/souvenir shop and Refreshments. The enterprise also creates added value for visitors by providing them with opportunities to sample various types of bush tucker when available. They also provide complimentary souvenirs of their participation in workshops.

4.5.2 Industry value chain participation

4.5.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

This enterprise does not cooperate with other Aboriginal and Torres Strait Islander enterprises in their region, but did indicated that they would like it to begin and that cooperation could be important for the marketing and promotion of their enterprise .

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 5 does not combine products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region. The enterprise does, however, refer their visitors on to other Aboriginal and Torres Strait Islander tourism operators once a month or more while other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once a month.

Meeting activity

The enterprise operator/s meet informally three to six times a year with other Aboriginal and Torres Strait Islander tourism operators in their region, but do not have scheduled business meetings. It is moderately important to have separation between informal and business meetings.

Importance of cultural relationships

It is of slight importance to this enterprise to maintain a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region, and cultural relationships are also of slight importance in building their informal and business relationships.

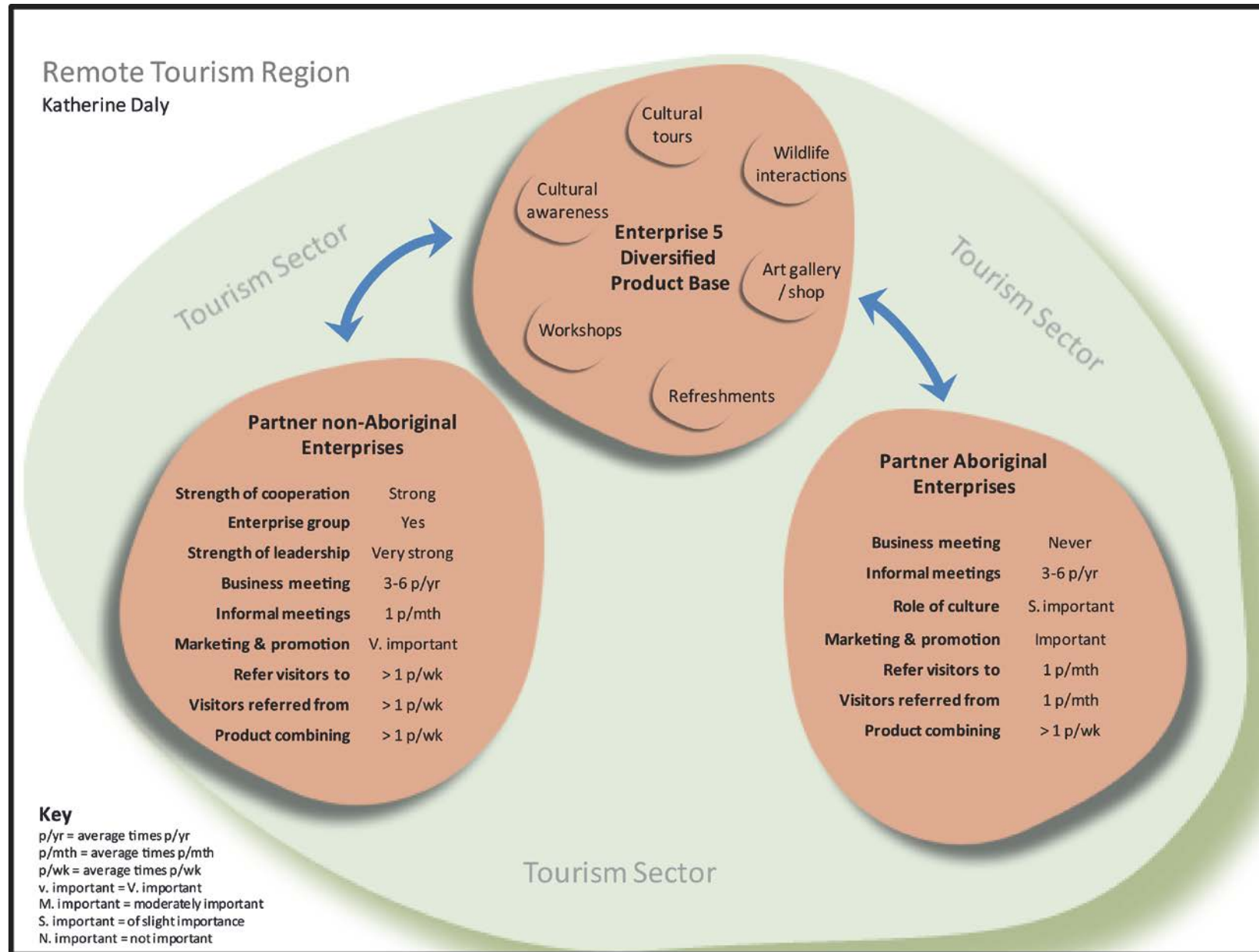


Figure 8: Value creation by Enterprise 5

4.5.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 5 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of this cooperation is strong. This activity is very important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of leadership of this group is considered to be very strong. This operator would like to increase their existing level of cooperation.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 5 combines with products or experiences of non-Aboriginal and Torres Strait Islander enterprises in their region an average once a week or more, but these were not specified. The enterprise also refers their visitors on to non-Aboriginal and Torres Strait Islander tourism operators in their region once a week or more, the same rate that non-Aboriginal and Torres Strait Islander operators refer visitors to their enterprise.

Meeting activity

Enterprise 5 engages in scheduled business meetings with non-Aboriginal and Torres Strait Islander operators three to six times a year on average and meets informally once a month. Having separation between these business and informal meetings is not important.

4.6 Enterprise 6

4.6.1 Value creation within the enterprise

Enterprise 6 is located in the Tableland region of the Northern Territory (see Figure 2). Figure 9 contains a configuration of their value-creating processes. Products and experiences offered to tourists include Cultural awareness activities, Bush tucker, Horse riding, Adventure trail rides and Visitor catering (billy tea and damper). On top of the experiences and products offered, this enterprise creates added value for its customers through transfers from accommodation places and free catering for drivers and guides.

4.6.2 Industry value chain participation

4.6.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 6 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation is very important for the competitiveness of their enterprise and moderately important to marketing and promotion. This operator did not indicate whether the enterprise was part of a group of cooperating enterprises in their region but did suggest that leadership among the group of Aboriginal and Torres Strait Islander enterprises in their region was weak. Enterprise 6 is unsure about whether they would like to increase their level of cooperation.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 6 never combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region. The enterprise refers their visitors on to other Aboriginal and Torres Strait Islander tourism enterprises in their region once a week or more, which is the same rate that other Aboriginal and Torres Strait Islander tourism operators in the region refer visitors to their enterprise.

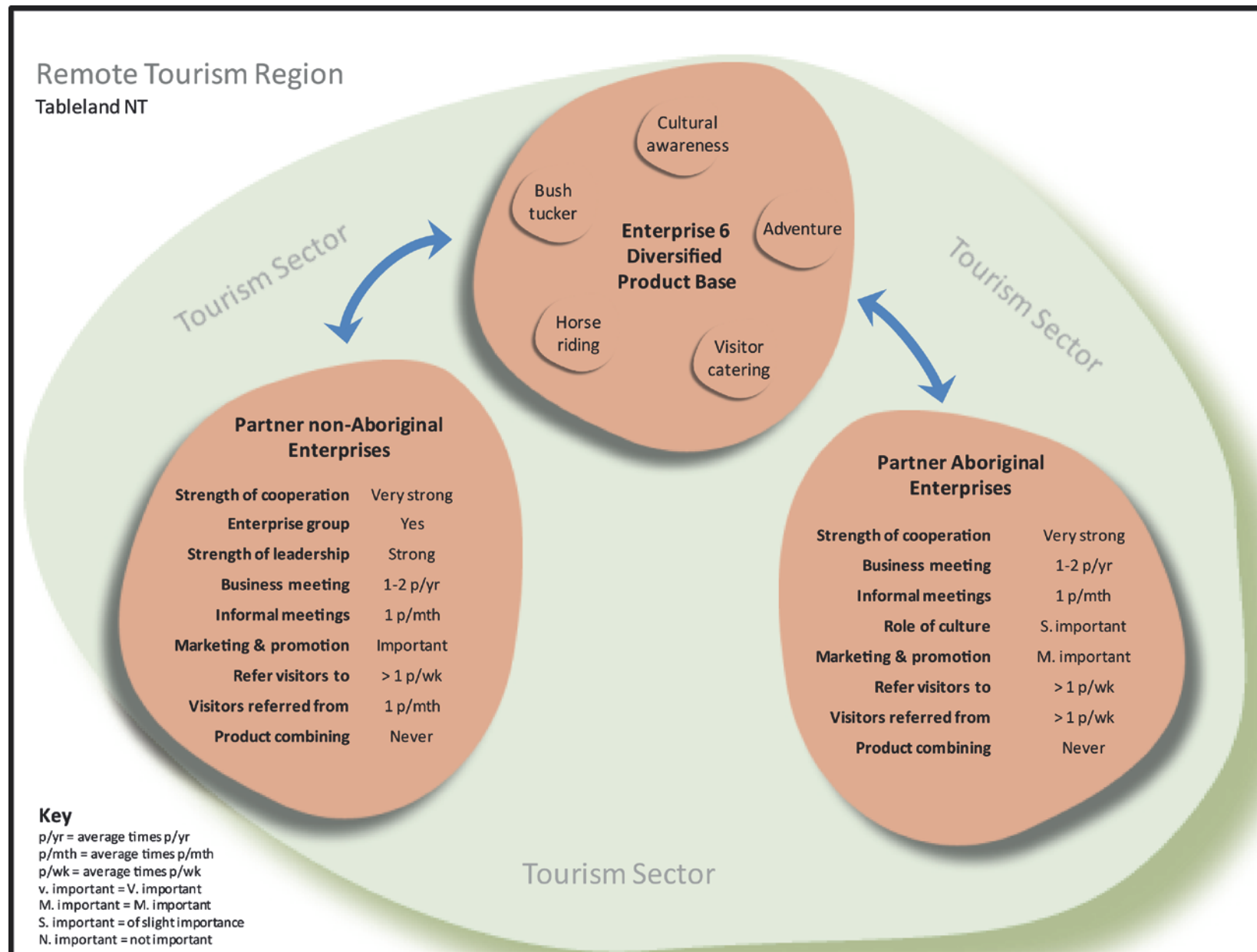


Figure 9: Value creation by Enterprise 6

Meeting activity

Enterprise 6 has scheduled business meetings one to two times a year with other Aboriginal and Torres Strait Islander tourism operators in their region. Once a month on average, they also meet with these enterprises informally; this operator believes separation between informal and business meetings is only of slight importance.

Importance of cultural relationships

To Enterprise 6, maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in the region is of slight importance, and of slight importance in building their informal and business relationships.

4.6.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 6 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and this relationship is very strong. This cooperation is very important for the competitiveness of the enterprise and important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in the region, and leadership of this group was rated as strong. The operator would like their existing level of cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 6 never combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region. However, the enterprise does refer their visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region once a week or more. Non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise around once a month.

Meeting activity

Enterprise 6 engages in scheduled business meetings with non-Aboriginal and Torres Strait Islander operators one to two times a year and meets informally with these enterprises once a month. Separation between business and informal meetings is of slight importance.

4.7 Enterprise 7

4.7.1 Value creation within the enterprise

Enterprise 7 is an adventure tour company operating in the Tropical North Queensland region (see Figure 2). Figure 10 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Fishing tours, Cave tours, Walking tours, Bush tucker, Access to art sites, Wildlife viewing, Workshops, Cultural awareness activities, Story places, Walking tracks, an Art gallery/souvenir shop, Visitor catering, an Information centre, and a Caravan park and campground. This enterprise offers a diverse range of products and experiences to visitors and creates added value by providing souvenirs.

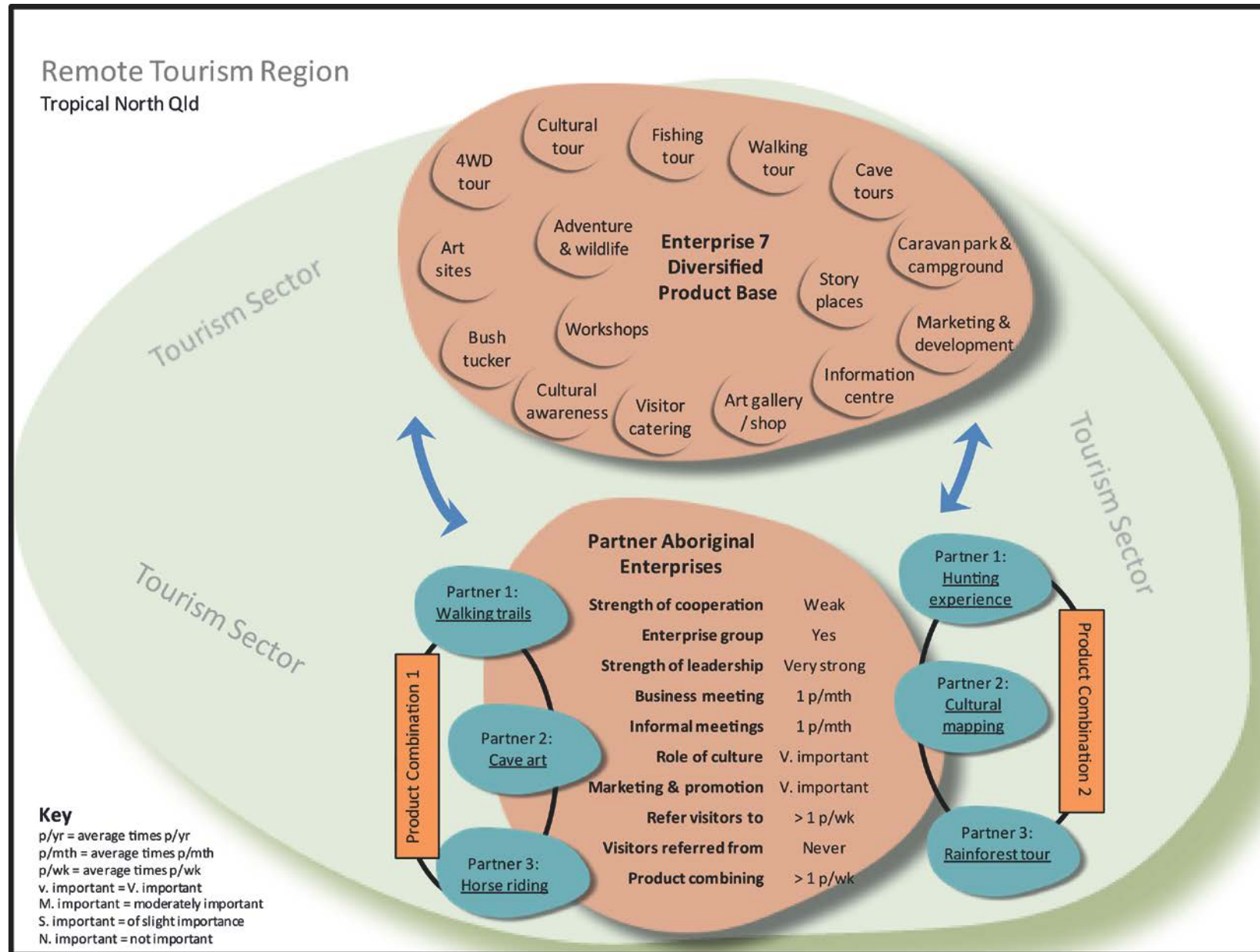


Figure 10: Value creation by Enterprise 7

4.7.2 Industry value chain participation

4.7.2.1 *Creating value with other Aboriginal and Torres Strait Islander enterprises*

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 7 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, but the strength of this cooperation is weak. Cooperation is very important for competitiveness, and very important in marketing and promotion. The enterprise is a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region and the leadership of this group is very strong. Enterprise 7 would like their existing cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Around once a week or more, Enterprise 7 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region. One combination involves a tour combined with another enterprise that provides walking trails, another that provides the cave art experiences, and another that provides horse riding experiences. In a second product combination, Enterprise 7 combines their tour with a hunting experience, a cultural mapping experience and a rainforest tour, all provided by separate Aboriginal and Torres Strait Islander enterprises. Enterprise 7 refers their visitors to other Aboriginal and Torres Strait Islander tourism operators once a week or more, while other Aboriginal and Torres Strait Islander tourism operators never refer visitors to their enterprise.

Meeting activity

Enterprise 7 holds scheduled business meetings and has informal meetings an average once a month with other Aboriginal and Torres Strait Islander tourism operators in the region. Separation between their informal and business meetings is not important.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region is very important, and very important in building their informal and business relationships.

4.7.2.2 *Creating value with non-Aboriginal and Torres Strait Islander enterprises*

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 7 does not cooperate with non-Aboriginal and Torres Strait Islander enterprises in their region, but indicated that they would like cooperation to begin.

4.8 Enterprise 8

4.8.1 Value creation within the enterprise

Enterprise 8 is located in Tropical North Queensland (see Figure 2). Figure 11 depicts a configuration of their value-creation processes. Products and experiences they offer to tourists include Cultural tours, Cave tours, Bush tucker, Art sites, Story places and Campground accommodation. The enterprise also creates added value for visitors by catering, providing seasonal bush foods and home cooking.

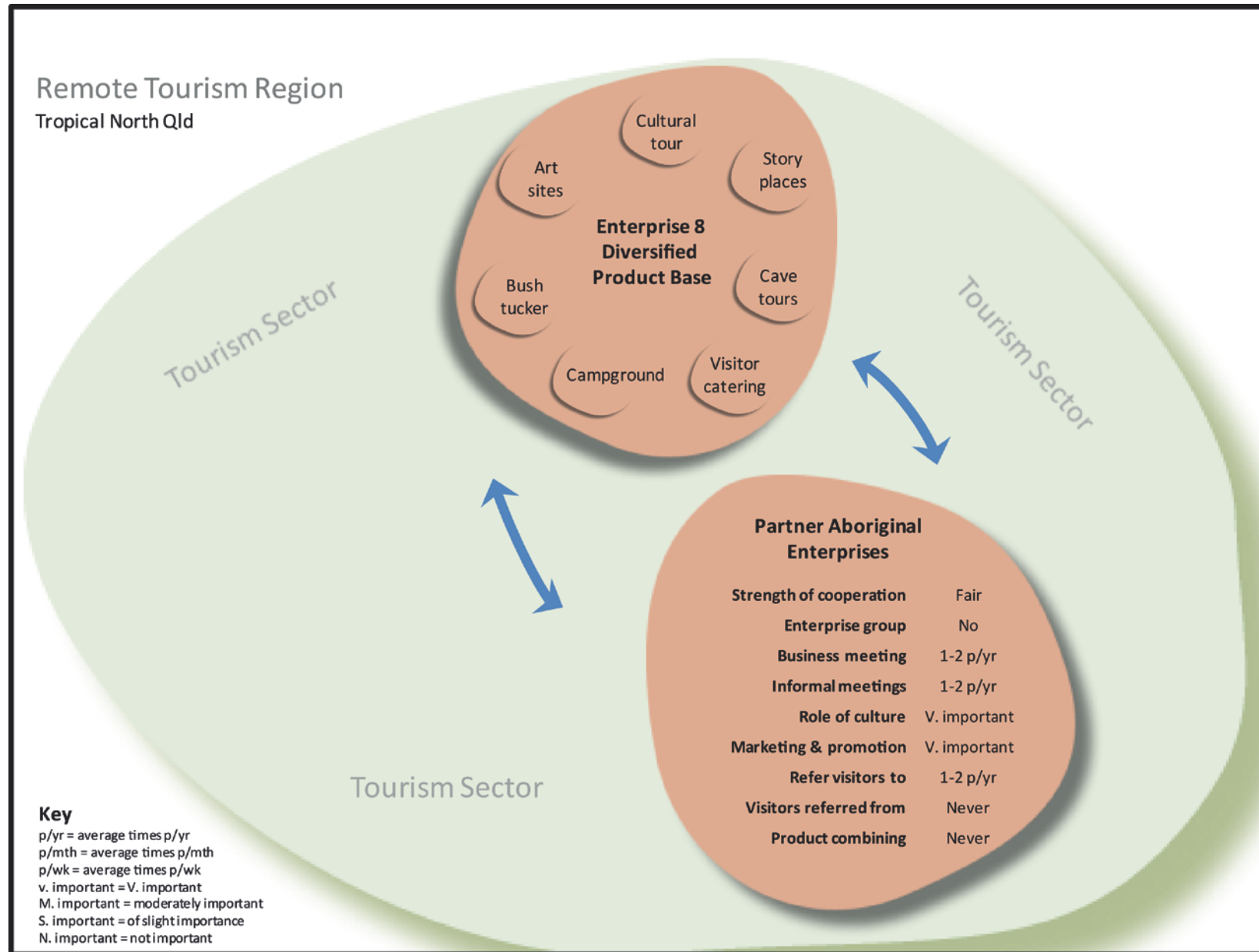


Figure 11: Value creation by Enterprise 8

4.8.2 Industry value chain participation

4.8.2.1 *Creating value with other Aboriginal and Torres Strait Islander enterprises*

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 8 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region but is not a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises. The strength of their cooperation is fair. Cooperation is moderately important for the competitiveness of the enterprise and very important to marketing and promotion. They would like their existing level of cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 8 does not combine products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region. However, they do refer visitors on to other Aboriginal and Torres Strait Islander tourism operators in their region, once or twice a year; other Aboriginal and Torres Strait Islander tourism operators in their region never refer visitors to their enterprise.

Meeting activity

This enterprise holds scheduled business meetings and has informal meetings an average one to two times a year. For Enterprise 8 it is important to have separation between their business and informal meetings.

Importance of cultural relationships

For Enterprise 8 it is very important to maintain a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region, and these cultural relationships are moderately important in building their informal and business relationships.

4.8.2.2 *Creating value with non-Aboriginal and Torres Strait Islander enterprises*

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 8 does not cooperate with non-Aboriginal and Torres Strait Islander enterprises in their region.

4.9 Enterprise 9

4.9.1 Value creation within the enterprise

Enterprise 9 is located in Tropical Far North Queensland (see Figure 2). Figure 12 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Bush tucker, Adventure, Workshops and Art/artefact making. The enterprise adds further value through their art classes with a local Aboriginal artist and providing visitors with a personally crafted memento of their experience.

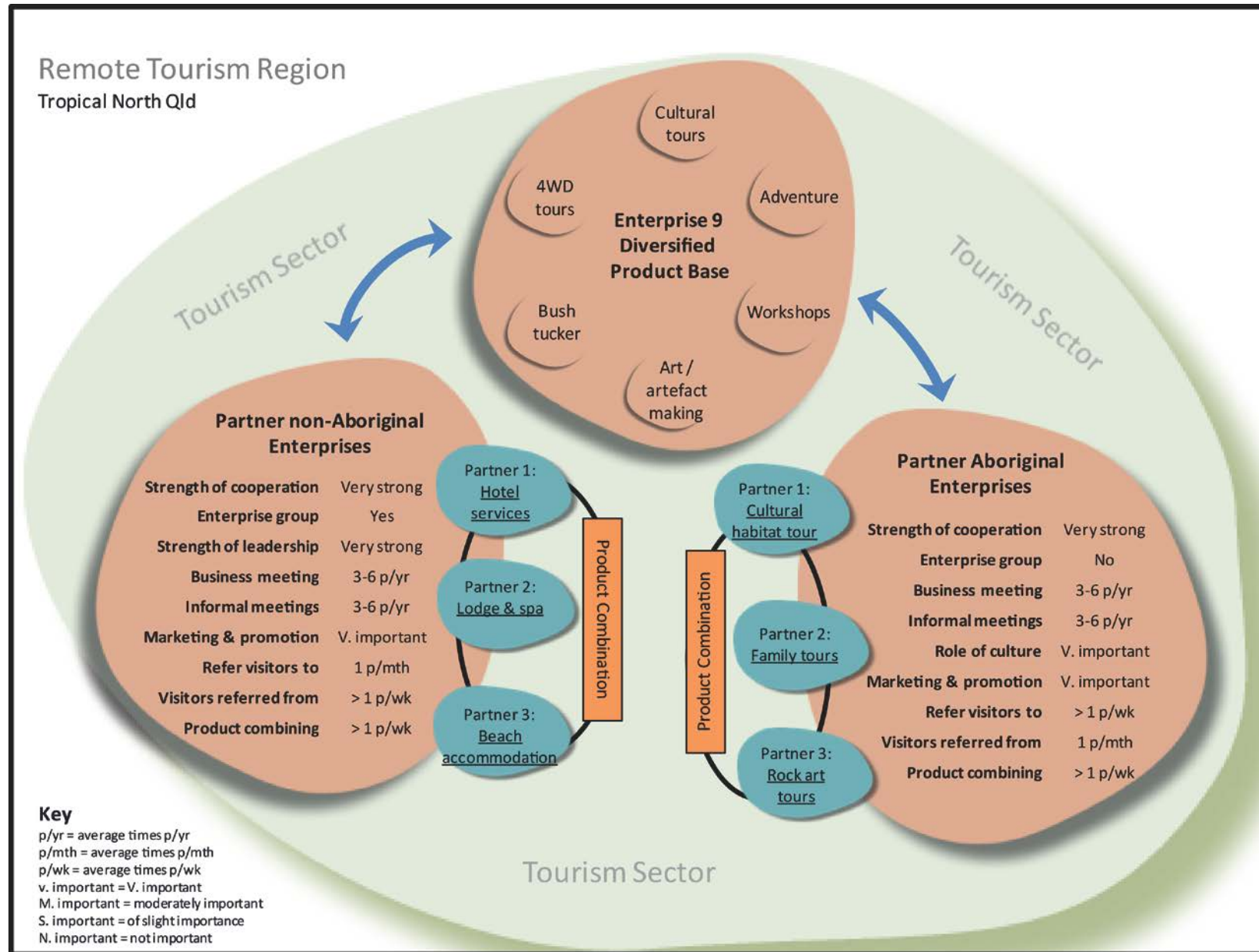


Figure 12: Value creation by Enterprise 9

4.9.2 Industry value chain participation

4.9.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 9 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation is very important for the competitiveness of their enterprise and is very important to marketing and promotion. They are not a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region, but they would like their existing cooperation activity to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 9 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region an average of once a week or more. One combination involves a set of tours that includes a cultural habitat tour provided by another Aboriginal and Torres Strait Islander operator, a family tour provided by another operator, and a rock art tour provided by a third operator. The enterprise refers their customers on to other Aboriginal and Torres Strait Islander tourism operators once a week or more, and other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once a month.

Meeting activity

This enterprise holds scheduled business meetings and has informal meetings an average three to six times a year with other Aboriginal and Torres Strait Islander tourism operators in their region. Separation between their business and informal meetings is very important.

Importance of cultural relationships

It is very important for Enterprise 9 to maintain a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region, and this relationship is very important in building their informal and business relationships.

4.9.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 9 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. This cooperation is very important for the competitiveness of their enterprise and also very important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and they consider the leadership of this group to be very strong. They would like their existing level of cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 9 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination involves tours that include hotel services provided by one operator, the services of a lodge and spa provided by another operator, and beach accommodation provided by a third enterprise.

Meeting activity

Enterprise 9 holds scheduled business meetings and has informal meetings an average of three to six times a year with non-Aboriginal and Torres Strait Islander operators. Separation between these business and informal meetings is very important.

4.10 Enterprise 10

4.10.1 Value creation within the enterprise

Enterprise 10 is in the Kakadu Arnhem region of the Northern Territory (see Figure 2). Figure 13 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Walking tours, Special interest tours, Event/festival, Art sites, Heritage sites and an Art gallery/shop. As well as creating value in this diverse product mix, this enterprise creates added value for visitors by providing free art centre tours and interpretation.

4.10.2 Industry value chain participation

4.10.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 10 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation is very important for the competitiveness of their enterprise and very important in marketing and promotion. The enterprise is part of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region. The strength of leadership of this group was rated as very strong. Enterprise 10 is unsure if they would like their existing level of cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 10 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination involves a rock art tour that includes a national park provided by one operator, an art gallery provided by another operator, and a tour provided by a third operator. The enterprise refers visitors on to other Aboriginal and Torres Strait Islander tourism operators in their region, once a week or more on average, the same rate that other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

Enterprise 10 does not have scheduled business meetings with other Aboriginal and Torres Strait Islander tourism operators in their region, but does meet informally with these operators three to six times a year. Separation between business and informal meetings is moderately important.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region is important, and important in building their informal and business relationships.

4.10.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 10 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, with the strength of this cooperation very strong. This cooperation is very important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of leadership of that group is very strong. Enterprise 10 is unsure if they would like their existing cooperation to increase.

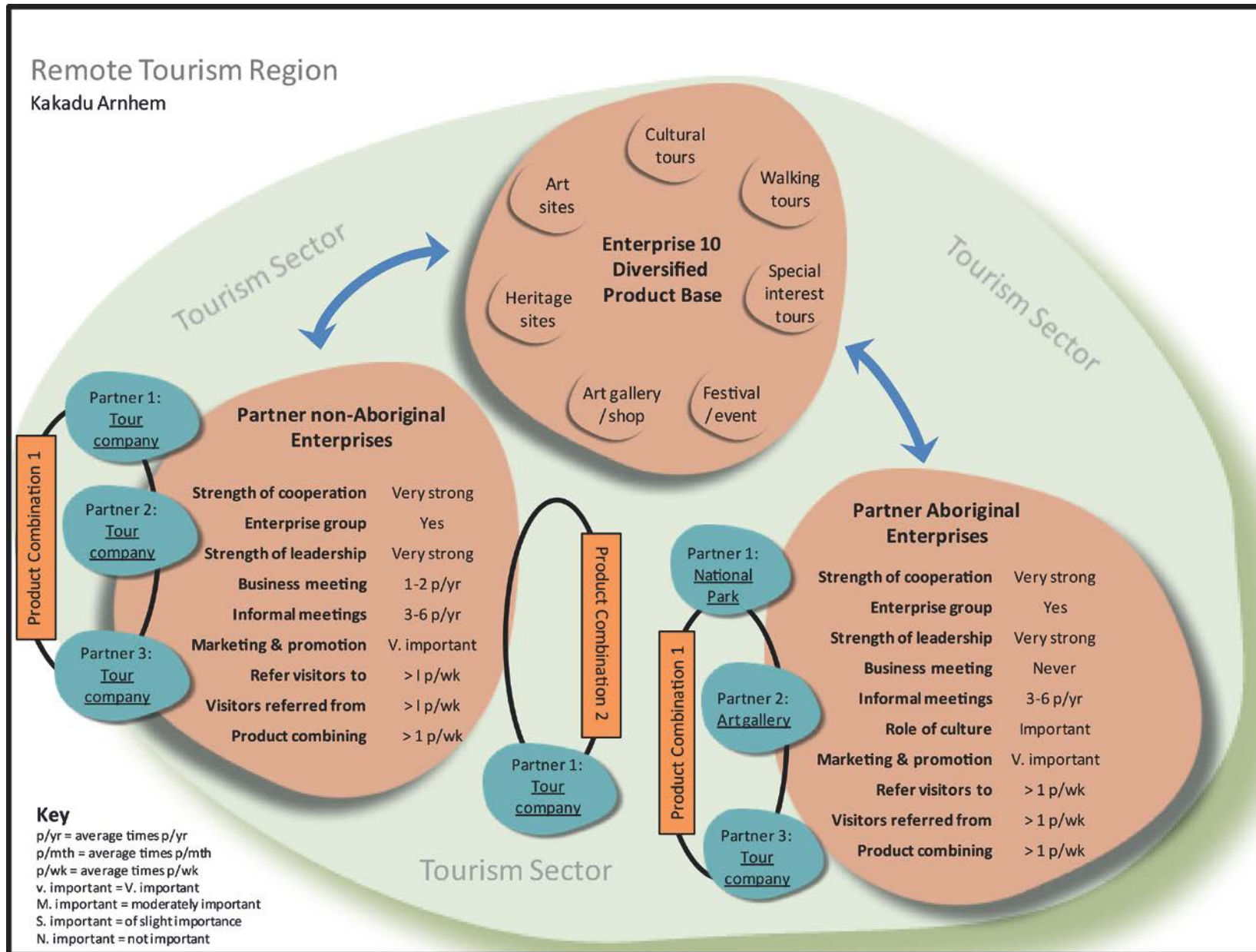


Figure 13: Value creation by Enterprise 10

Combining products with non–Aboriginal and Torres Strait Islander enterprises

Enterprise 10 combines products or experiences with non–Aboriginal and Torres Strait Islander enterprises in their region once a week or more. Product combinations involve rock art and art centre tours that include the products and services of four other tour companies. Enterprise 10 refers visitors to non–Aboriginal and Torres Strait Islander tourism operators in their region once a week or more, which is the same rate that non–Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

This enterprise holds scheduled business meetings with non–Aboriginal and Torres Strait Islander operators one to two times a year and meets informally with these operators three to six times a year. For this operator, it is moderately important to have separation between these business and informal meetings.

4.11 Enterprise 11

4.11.1 Value creation within the enterprise

Enterprise 11 is an adventure tour company in Outback New South Wales (see Figure 2). A configuration of their value-creation processes is provided in Figure 14. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Special interest tours, Walking tours, Bush tucker, Wildlife viewing, Adventure, Story places, Walking tracks, Heritage sites and Art sites. This enterprise provides added value through its Aboriginal guides and exclusive access to sites. It also creates customer value by providing trip information kits and discounts for repeat customers, who are characterised as VIP Club members.

4.11.2 Industry value chain participation

4.11.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 11 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, with the strength of this cooperation described as fair. Cooperation is of only slight importance for the competitiveness of their enterprise and is not important to marketing and promotion. Enterprise 11 is not a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region and is unsure about increasing their existing level cooperation.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 11 does not combine products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region, but refers their visitors on to these operators in their region an average once a month, which is the same rate other Aboriginal and Torres Strait Islander tourism operators in their region refer visitors to their enterprise.

Meeting activity

Enterprise 11 does not have scheduled business meetings with other Aboriginal and Torres Strait Islander tourism operators in their region, but does meet informally one or two times a year. This operator views separation between business and informal meetings as important.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region is not important, and not important in building informal and business relationships.

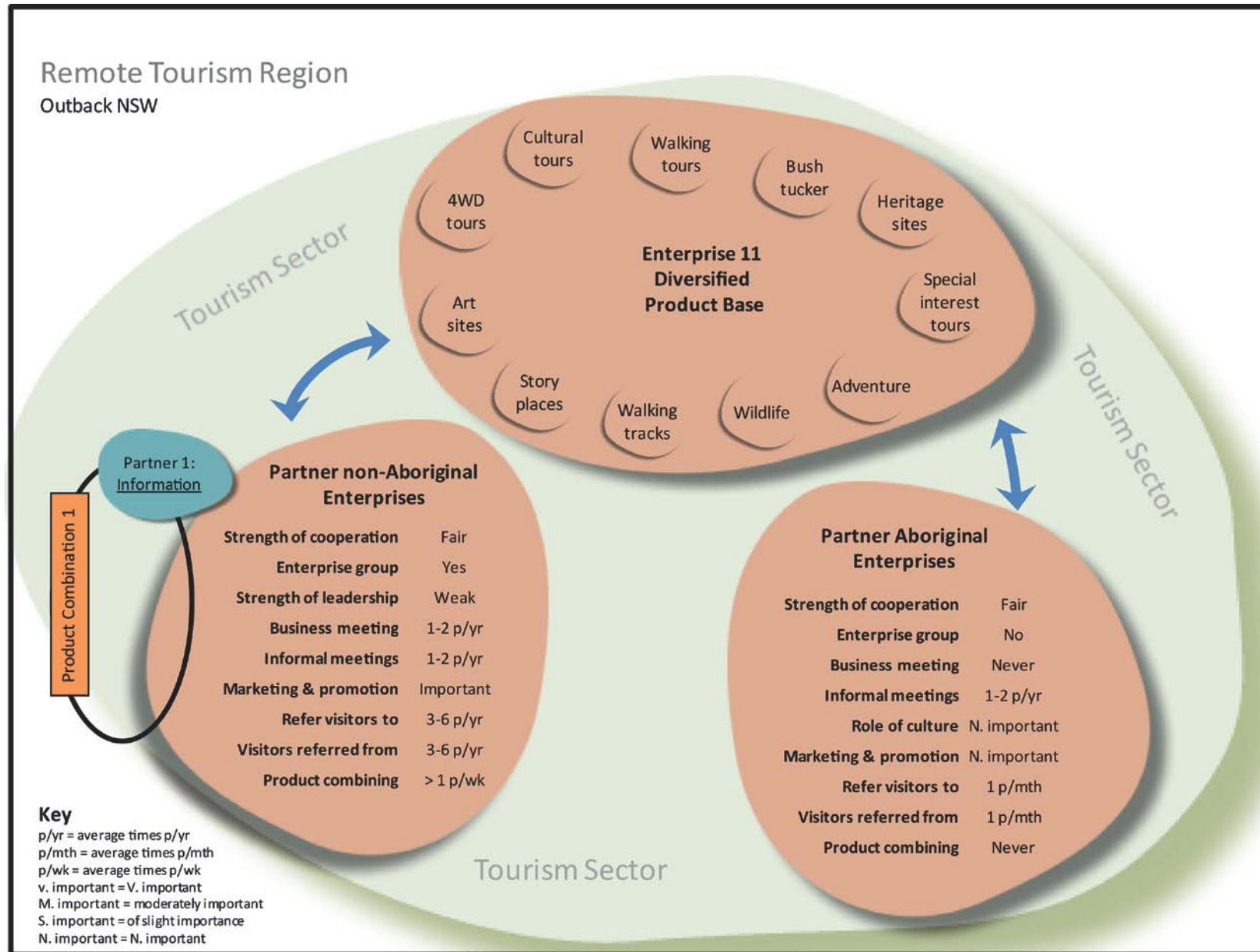


Figure 14: Value creation by Enterprise 11

4.11.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 11 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is fair. Cooperation is important for the competitiveness of the enterprise and important to marketing and promotion. This enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region, and the leadership of this group was rated as weak. Enterprise 11 would like their existing cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 11 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination involves tours that include information centre services provided by a non-Aboriginal and Torres Strait Islander enterprise. The enterprise refers visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year, which is the same rate non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

This enterprise holds scheduled business meetings and has informal meetings with non-Aboriginal and Torres Strait Islander operators an average one to two times a year. Separation between business and informal meetings is important.

4.12 Enterprise 12

4.12.1 Value creation within the enterprise

Enterprise 12 is in the Alice Springs region in the Northern Territory (see Figure 2). A configuration of their value-creation processes is provided in Figure 15. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Walking tours, Special interest tours, Bush tucker, Wildlife viewing, Adventure, Workshops, Art/artefact making, Art sites, Cultural awareness activities, Walking tracks, Visitor catering and a Campground. As well as the value created in this diverse range of tourism products, added value is created for visitors through free airport transfers and discounts for school groups or young leadership programs.

4.12.2 Industry value chain participation

4.12.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 12 does cooperate with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation is very important for the competitiveness of this enterprise and also important to marketing and promotion. The enterprise is a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region. The strength of the leadership of this group was rated as fair. Enterprise 12 is unsure if they would like to increase their existing level of cooperation.

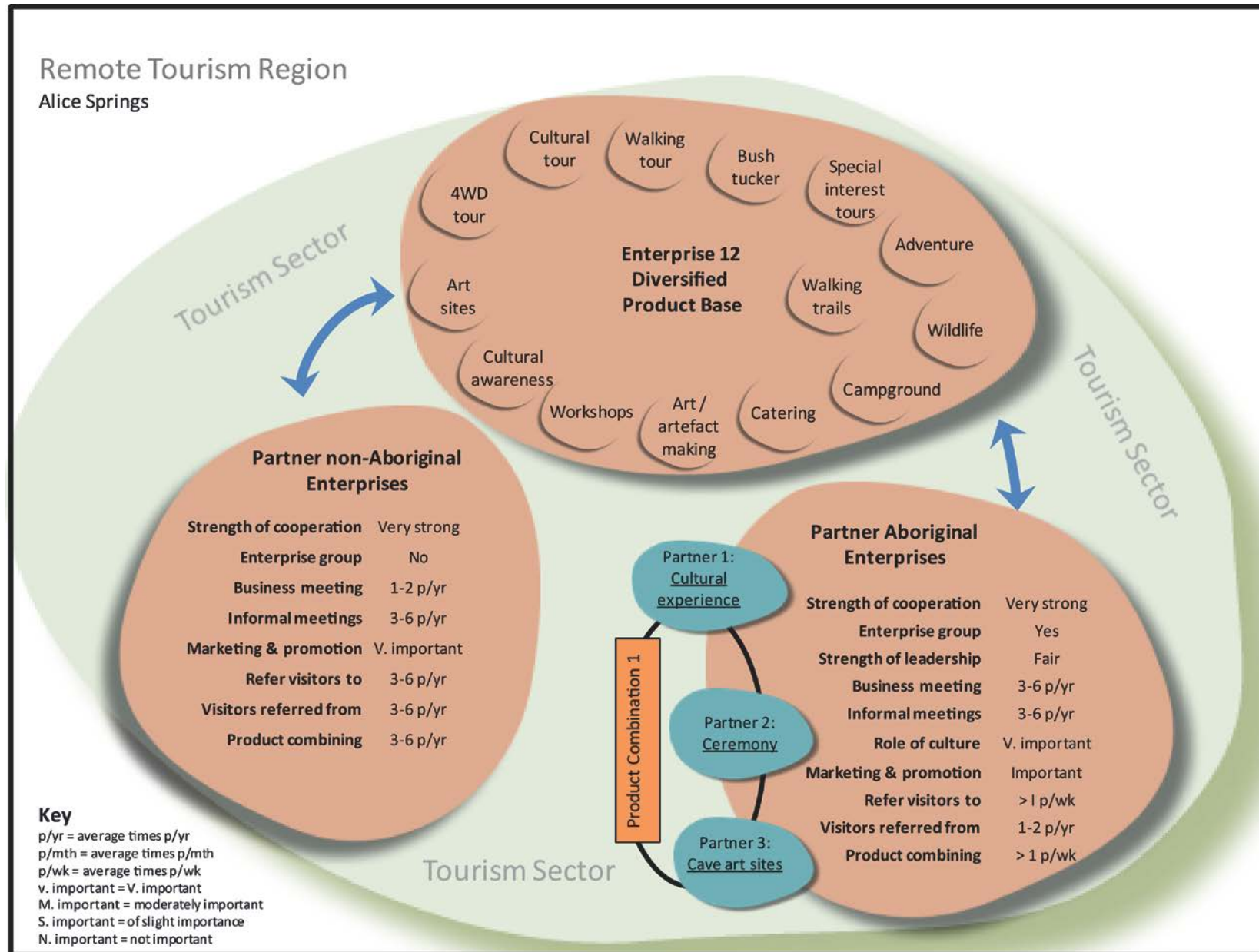


Figure 15: Value creation by Enterprise 12

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 12 combines products or experiences with Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination is a ‘travel immersion experience’ that incorporates a cultural experience provided by one Aboriginal and Torres Strait Islander operator, a ceremony provided by another operator, and a cave art experience provided by a third operator. The enterprise refers visitors on to other Aboriginal and Torres Strait Islander tourism operators in their region once a week or more. Other Aboriginal and Torres Strait Islander tourism operators in their region refer visitors to their enterprise one to two times a year.

Meeting activity

Enterprise 12 holds scheduled business meetings and informal meetings with other Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year. Separation between business and informal meetings is important to Enterprise 12.

Importance of cultural relationships

This operator believed that it is very important to maintain a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region, and that cultural relationships are very important in building their informal and business relationships.

4.12.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 12 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. This activity is very important for the competitiveness of their enterprise and very important to marketing and promotion. Enterprise 12 is not a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and is unsure if they would like to increase their existing level of cooperation.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 12 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region between three and six times a year, however these were not specified. The enterprise refers visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year, the same rate that non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

This enterprise engages in scheduled business meetings with non-Aboriginal and Torres Strait Islander operators one to two times a year and meets informally three to six times a year. Separation between these business and informal meetings is important.

4.13 Enterprise 13

4.13.1 Value creation within the enterprise

Enterprise 13 is in Australia’s North West region of Western Australia (see Figure 2). Figure 16 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Four-wheel-drive tours, Fishing tours, Walking tours, Heritage sites, an Art gallery/souvenir

shop, Visitor catering, Eco-lodges/cabins and a Conference venue. This enterprise also adds value to its already diverse range of product offerings by providing crabbing tours and in-house meals.

4.13.2 Industry value chain participation

4.13.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 13 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation is important for the competitiveness of the enterprise and important to marketing and promotion. The enterprise is a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region and the group's leadership is viewed as strong. They would like their existing cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 13 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region between three and six times a year. One combination involves tours that include bush products provided by one operator and camping by a second operator. Enterprise 13 refers their visitors on to other Aboriginal and Torres Strait Islander tourism operators once a week or more, which is the same rate that other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

This enterprise holds scheduled business meetings and has informal meetings with other Aboriginal and Torres Strait Islander tourism operators in their region three to six times a year. It is moderately important to have separation between their business and informal meetings.

Importance of cultural relationships

Enterprise 13 considers it very important to maintain cultural relationships with other Aboriginal and Torres Strait Islander tourism operators in their region, and that cultural relationships are very important in building their informal and business relationships.

4.13.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

The enterprise cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is fair. This cooperation is moderately important for the competitiveness of their enterprise, but very important to marketing and promotion. This enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region and the strength of leadership of this group was rated as fair. They would like their existing level of cooperation to increase.

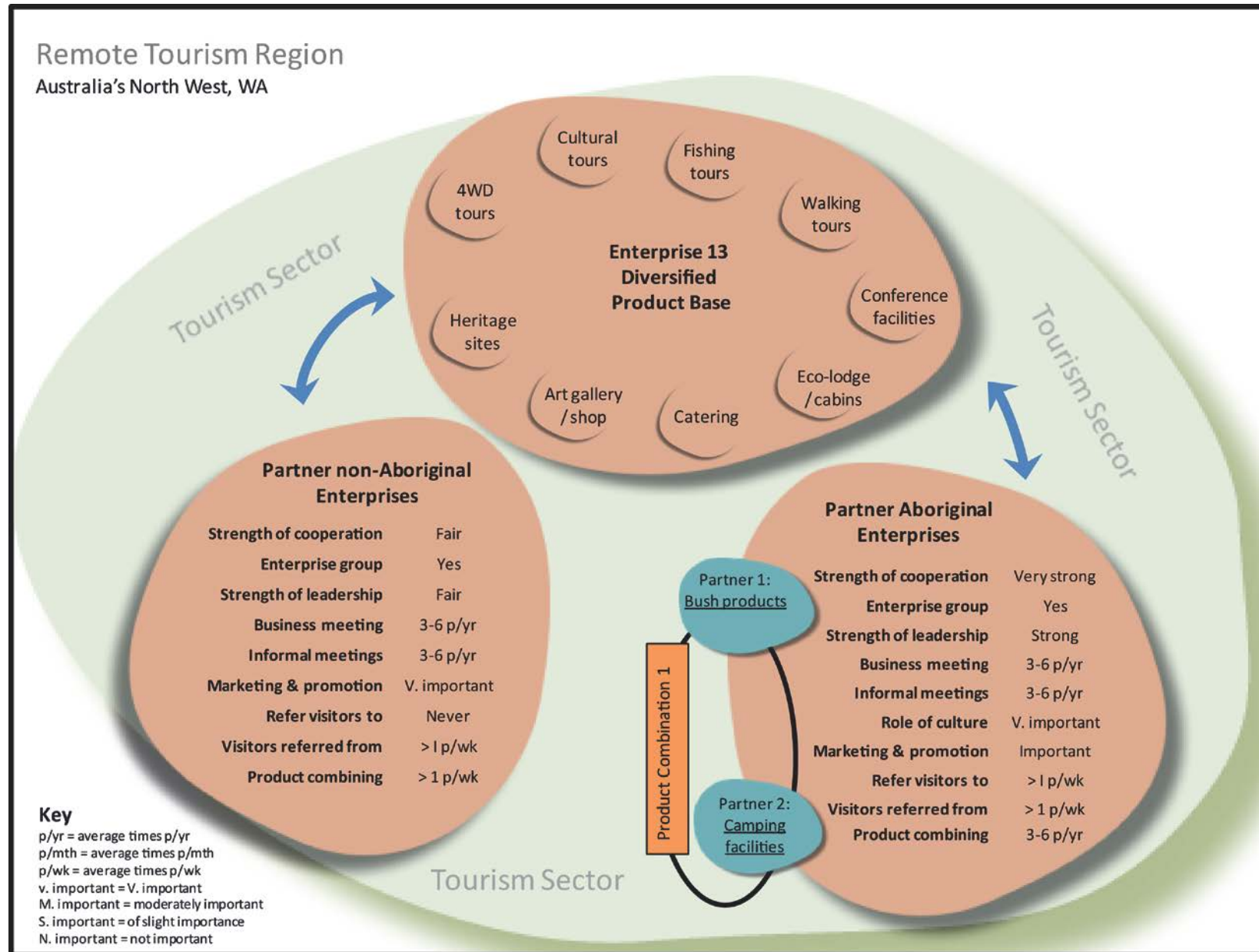


Figure 16: Value creation by Enterprise 13

Combining products with non–Aboriginal and Torres Strait Islander enterprises

Enterprise 13 combines products or experiences with non–Aboriginal and Torres Strait Islander enterprises in their region once a week or more, but these were not specified. This enterprise does not refer visitors to non–Aboriginal and Torres Strait Islander tourism operators in their region, but non–Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once a week or more.

Meeting activity

Enterprise 13 has informal meetings and holds scheduled business meetings with non–Aboriginal and Torres Strait Islander operators three to six times a year. Separation between these business and informal meetings is moderately important.

4.14 Enterprise 14

4.14.1 Value creation within the enterprise

Enterprise 14 is in Australia’s North West tourism region of Western Australia (see Figure 2). A configuration of their value-creation processes is shown in Figure 17. Value-added products and experiences offered to tourists include Visitor catering, a Restaurant/café, Caravan park and Campground. This enterprise also adds extra value by providing Restaurant, Roadhouse and Accommodation facilities in their remote location.

4.14.2 Industry value chain participation

4.14.2.1 Creating Value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 14 is unsure if they cooperate with other Aboriginal and Torres Strait Islander enterprises in their region, but would like cooperation to begin.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 14 combines products or experiences of other Aboriginal and Torres Strait Islander enterprises in their region once a month. One combination involves accommodation, meals and fuel by this enterprise while another Aboriginal and Torres Strait Islander operator provides a tour. The enterprise does refer visitors on to other Aboriginal and Torres Strait Islander tourism operators in their region once a week or more, and other Aboriginal and Torres Strait Islander tourism operators in their region refer visitors to their enterprise three to six times a year.

Meeting activity

This enterprise never has scheduled business meetings, nor do its operators meet informally with other Aboriginal and Torres Strait Islander tourism operators in their region.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in the region is very important, and important in building any informal and business relationships.

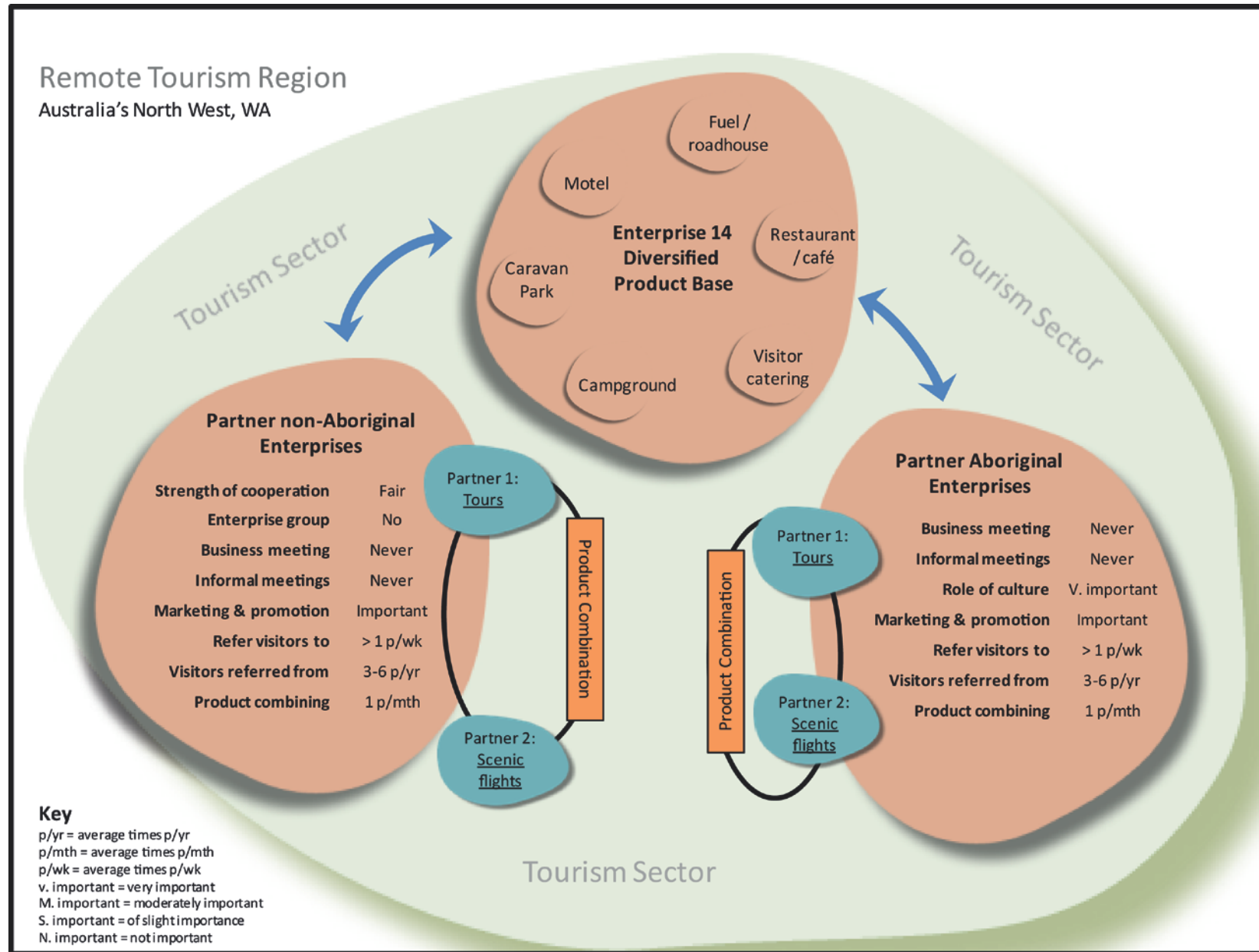


Figure 17: Value creation by Enterprise 14

4.14.2.2. Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 14 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation was described as fair. This activity is very important for the competitiveness of their enterprise and important to marketing and promotion. The enterprise is not a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region, but would like their existing level of cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 14 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region once a month. One combination involves accommodation, meals and fuel. This also includes tours provided by operator, and scenic flights provided by a second operator. Once a week or more on average, Enterprise 14 refers visitor to non-Aboriginal and Torres Strait Islander tourism operators in their region, while non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise three to six times a year.

Meeting activity

Enterprise 14 never engages in informal or scheduled business meetings with non-Aboriginal and Torres Strait Islander operators.

4.15 Enterprise 15

4.15.1 Value creation within the enterprise

Enterprise 15 is located in Australia's North West tourism region of Western Australia (see Figure 2); a configuration of their value-creation processes is mapped in Figure 18. Products and experiences offered to tourists include Cultural tours, Cruises, Bush tucker, Heritage sites, Wildlife viewing Walking tracks, Cultural awareness activities and Catering.

4.15.2 Industry value chain participation

4.15.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 15 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is strong. Cooperation is very important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region and they consider the leadership of this group to be very strong. Enterprise 15 would like their existing level of cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 15 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region between three and six times a year. One combination involves tours that incorporate three more tours provided by other Aboriginal and Torres Strait Islander enterprises. The enterprise refers visitors on to other Aboriginal and Torres Strait Islander tourism operators once a week or more, which is the same rate that other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise.

Meeting activity

Enterprise 15 holds scheduled business meetings three to six times a year, and informal meetings one to two times a year with other Aboriginal and Torres Strait Islander tourism operators in their region. Separation between these business and informal meetings is important.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region is very important, and cultural relationships are very important in their informal and business relationships.

4.15.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises**Cooperation with non-Aboriginal and Torres Strait Islander enterprises**

Enterprise 15 cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. This cooperation is very important for the competitiveness of their enterprise and very important to marketing and promotion. The enterprise is a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region, and the leadership of this group was rated as very strong. Enterprise 15 would like their existing level of cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 15 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region once a week or more. These combinations mainly involve tours. Once a month, Enterprise 15 refers visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region, who refer visitors to their enterprise once a week or more in return.

Meeting activity

Enterprise 15 meets informally and holds scheduled business meetings with non-Aboriginal and Torres Strait Islander operators one to two times a year. Separation between these business and informal meetings is important.

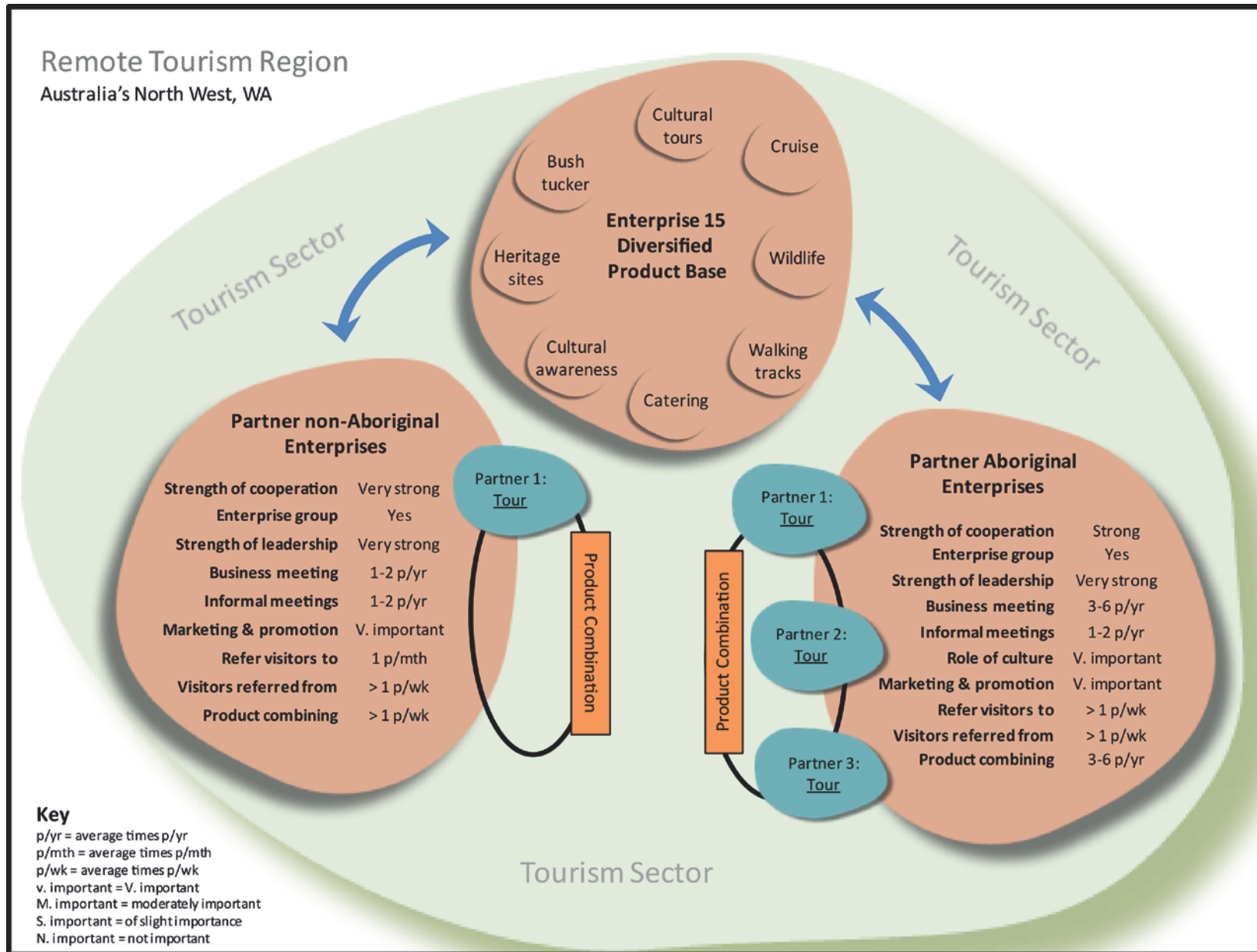


Figure 18: Value creation by Enterprise 15

4.16 Enterprise 16

4.16.1 Value creation within the enterprise

Enterprise 16 is located in the MacDonnell tourism region of the Northern Territory (see Figure 2). Figure 19 provides a configuration of their value-creation processes. Products and experiences offered to tourists include Cultural tours, Walking tours, Special interest tours, Adventure, Bush tucker, Workshops, Art/artefact making, an Art room, Cultural awareness activities, Story places, Walking tracks, an Art gallery/souvenir shop, an Information centre, General store and fuel outlet, a Caravan park, an Eco-lodge/cabins and a Campground. This enterprise also creates additional value by providing rock art tours and storytelling with local Aboriginal guides, a range of general supplies, local foods, barbeques and cooking.

4.16.2 Industry value chain participation

4.16.2.1 Creating value with other Aboriginal and Torres Strait Islander enterprises

Cooperation with other Aboriginal and Torres Strait Islander enterprises

Enterprise 16 cooperates with other Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is strong. Their cooperation is very important for the competitiveness of their enterprise and moderately important to marketing and promotion. This enterprise is not a member of a group of cooperating Aboriginal and Torres Strait Islander enterprises in their region, but would like their existing level of cooperation to increase.

Combining products with other Aboriginal and Torres Strait Islander enterprises

Enterprise 16 combines products or experiences with other Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination includes their accommodation with a bush tucker tour provided by another Aboriginal and Torres Strait Islander operator, a tour provided by a second operator, and food provided by a third operator. Once a week or more Enterprise 16 refers visitors on to other Aboriginal and Torres Strait Islander tourism operators in their region, while other Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise three to six times a year.

Meeting activity

Enterprise 16 holds scheduled business meetings once a month and informal meetings once a week or more with other Aboriginal and Torres Strait Islander tourism operators in their region. Separation between these business and informal meetings is only of slight importance.

Importance of cultural relationships

Maintaining a cultural relationship with other Aboriginal and Torres Strait Islander tourism operators in their region is very important, and very important in their informal and business relationships.

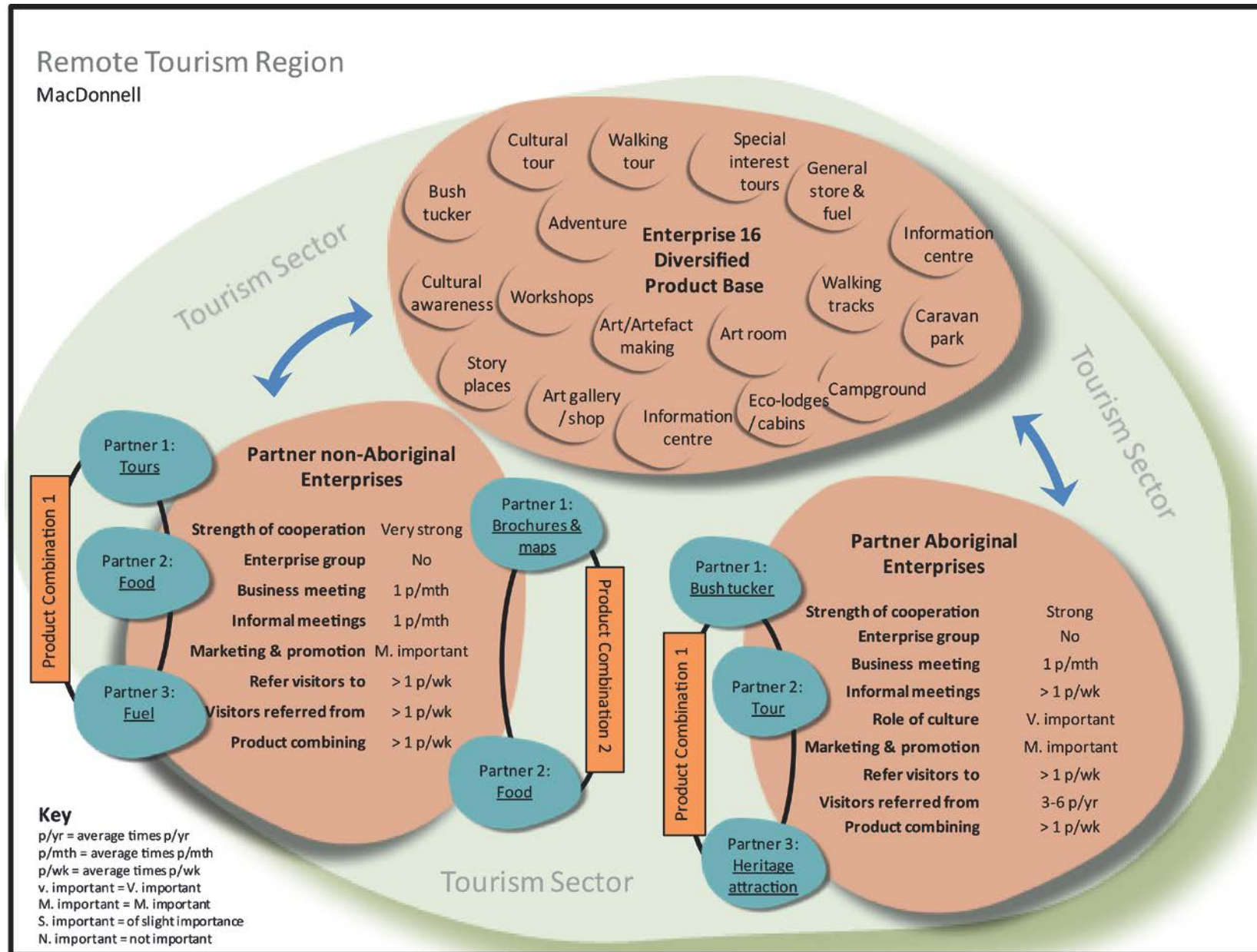


Figure 19: Value creation by Enterprise 16

4.16.2.2 Creating value with non-Aboriginal and Torres Strait Islander enterprises

Cooperation with non-Aboriginal and Torres Strait Islander enterprises

This enterprise cooperates with non-Aboriginal and Torres Strait Islander enterprises in their region, and the strength of this cooperation is very strong. Cooperation with non-Aboriginal and Torres Strait Islander enterprises is very important for the competitiveness of their enterprise and moderately important to marketing and promotion. Enterprise 16 is not a member of a group of cooperating non-Aboriginal and Torres Strait Islander enterprises in their region, but would like their existing level of cooperation to increase.

Combining products with non-Aboriginal and Torres Strait Islander enterprises

Enterprise 16 combines products or experiences with non-Aboriginal and Torres Strait Islander enterprises in their region once a week or more. One combination involves their accommodation combined with tours provided by a non-Aboriginal and Torres Strait Islander tourism operator, food provided by a second operator, and fuel provided by a third operator. A second combination involves visitor supplies provided by the general store, which includes brochures, maps and information provided by another enterprise and food supplies provided by another. Enterprise 16 refers visitors to non-Aboriginal and Torres Strait Islander tourism operators in their region once a week or more. Non-Aboriginal and Torres Strait Islander tourism operators refer visitors to their enterprise once a week or more.

Meeting activity

Enterprise 16 holds scheduled business meetings and has informal meetings with non-Aboriginal and Torres Strait Islander tourism operators an average once a month. Separation between these business and informal meetings is moderately important for this enterprise.

4.17 Enterprise 17

4.17.1 Value creation within the enterprise

Enterprise 17 is in Australia's Golden Outback tourism region of Western Australia (see Figure 2); a configuration of their value-creation processes is shown in Figure 20. Their products and experiences include Cultural awareness activities, an Art gallery/souvenir shop, Four-wheel-drive trails, an Information centre, a General store and a Campground. This enterprise adds additional value by showing visitors the workings of their outstation. Interaction with visitors is important for adding value to their experiences. Cultural chats about their land and people are held around the campfire at night, with a free espresso. In this way, the operators aim to help visitors feel comfortable in this very remote area.

4.17.2 Industry value chain participation

While Enterprise 17 has received business advice and/or development support from an Aboriginal enterprise in their region, they do not currently engage in value creation with other Aboriginal and Torres Strait Islander enterprises or with non-Aboriginal and Torres Strait Islander enterprises in their region. They do, however, have linkages with the wider community.

Relationship with the wider community

For this enterprise, it is very important to be involved with their Aboriginal and Torres Strait Islander community and the wider community in their region.

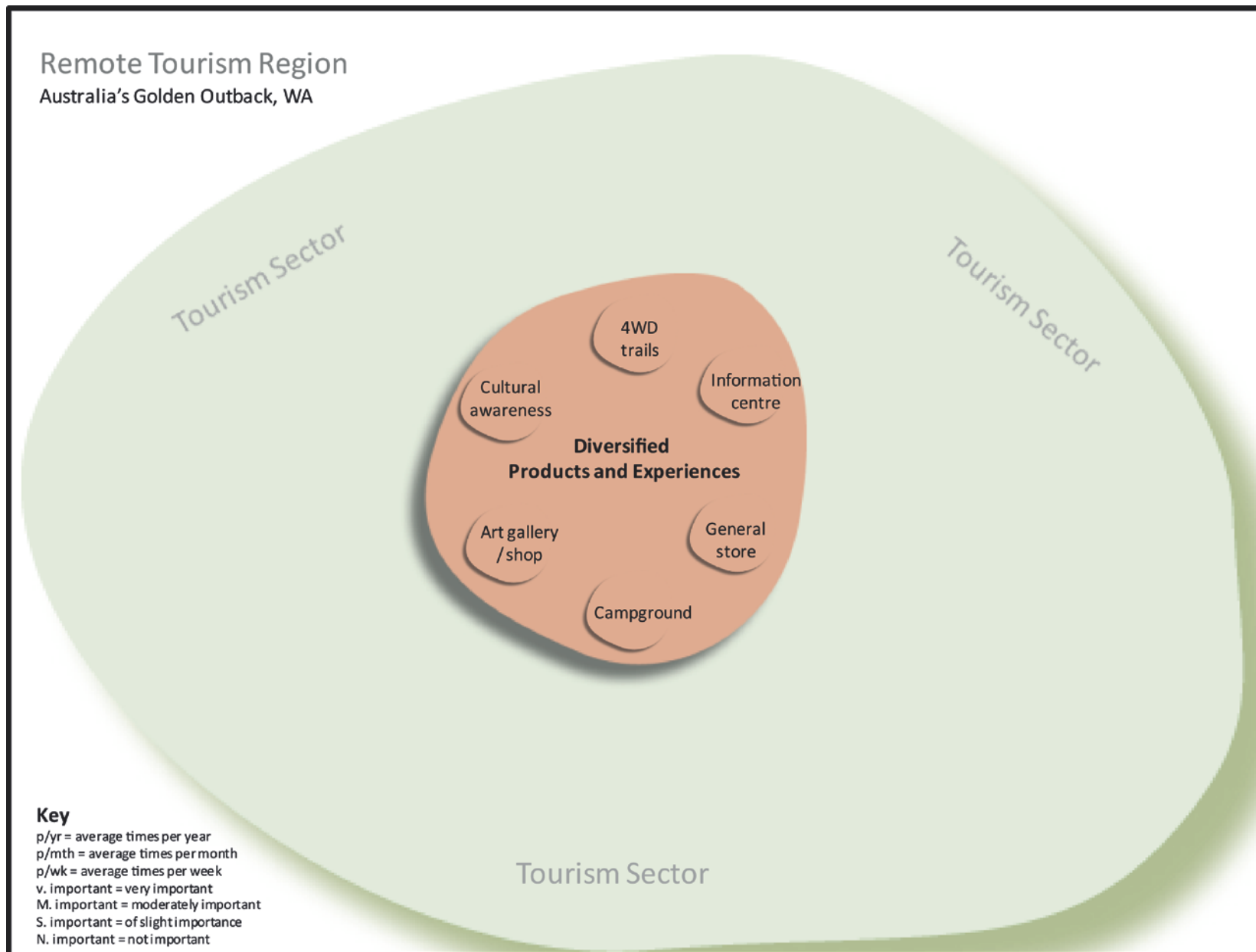


Figure 20: Value creation by Enterprise 17

4.18 Value creation in Aboriginal and Torres Strait Islander remote tourism enterprises: summary

These findings show that Aboriginal and Torres Strait Islander tourism enterprises provide diverse tourism products and experiences to visitors in remote Australia. Value is created by each enterprise in their mix of products and experiences. Each enterprise is unique, comprising product offerings that are differentiated between enterprises more often than these products and experiences overlap. The suggestion is that for Aboriginal and Torres Strait Islander people across remote Australia, participating in tourism involves developing a range of products and experiences relating to different components of a destination tourism system. The high incidence of product diversification within most enterprises suggests that vertical and horizontal integration are part of value-creation processes available in remote Australia. Whether diversified product bases are conducive to enterprise cooperation is unclear; however, it does lend itself to the development of enterprises with more possible points of complementarity.

Diversification also indicates that enterprise value chains are heterogeneous and do not follow a ‘one size fits all’ value chain model for Aboriginal and Torres Strait Islander remote tourism enterprises. Diverse products and experiences require diverse value-creation processes based on different resources, providers and other inputs. The findings suggest it may be appropriate to view Aboriginal and Torres Strait Islander remote tourism enterprises as participating in remote tourism, rather than as producing an undifferentiated set of ‘Aboriginal tourism products’. Many Aboriginal and Torres Strait Islander remote tourism enterprises participating in this study recognise diverse tourism opportunities in their region and (depending on resources, capacity, markets, etc.) adapt their enterprises in line with those options.

Many enterprises participating in this study utilise cooperation to create value for visitors. Not only do they draw on cooperation, but the forms of cooperation used by these operators are diverse. This adds to the complexity of processes to create value for visitors. Many enterprises draw on cooperation to create new industry value chains that, as the value-creation configurations reveal, add to the complexity of value-creation processes but enable an enterprise to offer tourism experiences it may have difficulty providing alone. Given the issues of high costs of business, lack of infrastructure, geographic isolation and other factors identified in section 3.5, the capacity to generate new industry value chains from existing resources may be one of few avenues to boost competitiveness. The value-creation configurations highlight that with increased enterprise cooperation, the value-creation processes become more robust and complex, but it was beyond the scope of this study to examine the effect this has on resources. It may be that advanced cooperation, such as clustering, does require increased input from participants, but it is unclear whether this applies to all forms of cooperation.

In a sense, the robust configurations of value creation practised by some enterprises in this study (e.g. Enterprises 9, 10 and 16) are indicative of Aboriginal and Torres Strait Islander remote tourism enterprises creating their own sense of critical mass. Critical mass emerges from boosting their internal resources with the resources available externally from other enterprises in their region. This interconnectedness is nurtured in remote regions, where a tourism sector may often appear to be small and sparse. Whether enterprises with limited value-creation processes (such as those that do not utilise industry value chains or enterprise cooperation) are unable to achieve this is unclear; it is also unclear whether enterprise cooperation results in more products and experiences for visitors, or just better value. Not cooperating with enterprises may equate to forgone opportunities, or this approach may be more suited to the localised contexts of some enterprises. Being part of a destination tourism system may not always mean the products and experiences an enterprise offers to visitors are linked to other enterprises via cooperation. In other words, an enterprise may be an integrated component of a destination without entering enterprise

cooperation arrangements. As the diversity of value-creation configurations presented in the report shows, enterprise cooperation may be useful for some, but it might not be an ingredient in the value-creation processes of every enterprise.

While product combination activity is practised by many enterprises, it does not occur frequently for remote Aboriginal and Torres Strait Islander enterprises overall. While it might seem that enterprises providing highly diversified products and experiences may not need to combine their products with other operators, this study did not identify such a pattern. The value-creation configurations highlight that combining products with other enterprises creates experiences that are broader and more multi-faceted than the product base of each enterprise. The findings suggest a tendency for product combinations with other Aboriginal and Torres Strait Islander enterprises to be related to strengthening a core product/experience theme (e.g. tours, natural and cultural attractions), while the marginally higher occurrence of product combinations with non-Aboriginal and Torres Strait Islander enterprises are often part of visitor packages (e.g. transport, transfers, accommodation, fuel and other supplies). This may be because there are currently more non-Aboriginal and Torres Strait Islander enterprises and they are more likely to provide these broader tourism services and have more resources, market access and infrastructure.

Overall, the value-creation configurations utilised by existing Aboriginal and Torres Strait Islander remote tourism enterprises are varied. While this study did not address resource requirements behind value creation, the complexity of value-creation processes appears to increase with the robustness of enterprise cooperation. The findings demonstrate that in their efforts to generate value for visitors to remote Australia, many enterprises are willing to diversify and try a range of enterprise cooperation approaches. The value-creation configurations highlight that these approaches seem to enlarge the value-creation processes, but it is unclear whether the actual products and experiences are increased or just 'improved'. It was rare, however, for participants in this study not to view cooperation as important to enterprise competitiveness, and it was also rare for participants not to desire an increase in cooperative activity.

4.18.1 Value creation in Aboriginal and Torres Strait Islander remote tourism enterprises: key findings in brief

Key findings from mapping the value-creation configurations of Aboriginal and Torres Strait Islander remote tourism enterprises in this study are listed below:

- Aboriginal and Torres Strait Islander remote tourism enterprises are heterogeneous.
- Product diversification is common among enterprises.
- As enterprise cooperation increases, the value-creation processes become more robust.
- The creation of value for visitors appears to be a multi-faceted process for many enterprises.
- There is a high level of variability between the value-creation approaches of enterprises.
- Enterprises draw on a range of cooperation approaches in order to increase value for visitors in remote Australia.
- Combining products and experiences with Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises is practised by many enterprises.
- Product combinations with other Aboriginal and Torres Strait Islander enterprises tend to be related to strengthening a core product/experience theme.
- Product combinations with non-Aboriginal and Torres Strait Islander enterprises are often part of visitor packages.
- Enterprises with highly diversified products and experiences appear just as likely as non-diversified enterprises to combine their products with other operators.

- Enterprises that are uncertain about increasing cooperation appear to be content with existing activity rather than unwilling to be cooperative.

5. Aboriginal and Torres Strait Islander remote tourism industry value chain assessment

The processes of value creation for each Aboriginal and Torres Strait Islander enterprise were presented in the preceding chapter. A synthesis of these findings is now presented. The chapter provides an assessment of industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector, covering involvement in cooperation, desire to increase cooperation, combining products, referring visitors, cultural and community relationships, cooperative marketing and promotion, group membership and external support for cooperative activity.

5.1 Building value through cooperation

5.1.1 Involvement in enterprise cooperation

Overall, cooperative activity appears to be widespread and relatively strong. Table 6 shows that enterprise cooperation is important for the majority of operators participating in the study. More than 80% of study participants engage in cooperation activity with Aboriginal and Torres Strait Islander tourism operators (81%) and non-Aboriginal and Torres Strait Islander tourism operators (87.5%) in their destination region.

Table 6: Involvement in enterprise cooperation

Cooperation with other tourism operators in the destination region	Yes	No	Unsure
Aboriginal and Torres Strait Islander tourism operators	81%	6%	13%
Non-Aboriginal and Torres Strait Islander tourism operators	87.5%	12.5%	-

Table 7: Strength of enterprise cooperation

Strength of cooperation with other tourism operators in the destination region	Very strong	Strong	Fair	Weak	Very weak
With Aboriginal and Torres Strait Islander operators	46%	15%	30%	7%	0
With non-Aboriginal and Torres Strait Islander tourism operators	50%	23%	27%	0	0

The strength of cooperation between Aboriginal and Torres Strait Islander tourism operators and other enterprises in the destination region (see Table 7) was measured on a 5-point Likert scale (1 being 'Very weak' and 5 being 'Very strong'). Of responding operators, 61% indicated that the strength of cooperation with other Aboriginal and Torres Strait Islander tourism operators in the region is either very strong (46%) or strong (15%), and 73% view their cooperation with non-Aboriginal and Torres Strait Islander tourism operators in the region as very strong (50%) or strong (23%), while 27% report the strength of cooperation as fair.

Open-ended comments from study participants revealed more about their views and insights into enterprise cooperation. One operator noted that cooperation ensures an appropriate product mix:

Tourism is multi-faceted, and it is good to maintain and encourage a range and variety of businesses. You can have too many people doing the same things. [Enterprise 2]

As shown in Table 8, cooperation with Aboriginal and Torres Strait Islander tourism operators is considered as very important (61%), important (8%) or moderately important (15%) for the competitiveness of their remote tourism enterprise. Study participants stated that it is very important (71%), important (21%) or moderately important (7%) for the competitiveness of their enterprise to cooperate with non-Aboriginal and Torres Strait Islander tourism operators in their region.

Table 8: Importance of cooperation for competitiveness

Perceived importance of cooperation for competitiveness	Very important	Important	Moderately important	Of slight importance	Not important
Cooperation with Aboriginal and Torres Strait Islander enterprises	61%	8%	15%	8%	8%
Cooperation with non-Aboriginal and Torres Strait Islander enterprises	71%	21%	8%	0	0

5.1.2 The role of cooperation in enterprise competitiveness and marketing

The study participants were also asked about the importance of cooperation to market and promote their enterprise. Importance was rated on a 5-point Likert scale (1 being 'Not important' and 5 being 'Very important'). Table 9 indicates that the majority (80%) stated that it is either very important (40%) or important (40%) to market and promote their enterprise in cooperation with other Aboriginal and Torres Strait Islander operators in their region. Only 7% stated that cooperation is not important to market and promote their enterprise. All operators place importance on cooperating with non-Aboriginal and Torres Strait Islander operators in their region to market and promote their enterprise, with 50% stating that it is very important, 43% stating that it is important and the remaining 7% stating that it is moderately important.

Table 9: Importance of cooperation for marketing and promotion

Importance of cooperation in marketing and promotion	Very important	Important	Moderately important	Of slight importance	Not important
Cooperation with Aboriginal and Torres Strait Islander enterprises	40%	40%	13%	0	7%
Cooperation with non-Aboriginal and Torres Strait Islander enterprises	50%	43%	7%	0	0

5.1.3 Desire to increase cooperation

The majority of study participants (87.5%) would like to increase cooperation with other tourism enterprises in their respective regions. As Table 10 shows, 75% of operators want increased enterprise cooperation with other Aboriginal and Torres Strait Islander tourism operators in their region, and a greater proportion (87.5%), want to increase cooperation with non-Aboriginal and Torres Strait Islander tourism operators in their region. No study participants indicated they did not want to increase their level of enterprise cooperation.

Table 10: Desire to increase enterprise cooperation

Desire to increase industry cooperation	Yes	No	Unsure
With other Aboriginal and Torres Strait Islander tourism operators	75%	0	25%
With non-Aboriginal and Torres Strait Islander tourism operators	87.5%	0	12.5%

Some operators suggested that cooperative activity would be beneficial for all tourism operators in remote areas. One operator, for example, explained:

Indigenous operators and potential operators need to become more serious about business and the benefits cooperation could provide. [Some] operators can be very competitive and not see the benefits in cooperating more. There is also some separation between white operators and Indigenous operators that is unnecessary and it means we are not spreading the benefits as widely as we could be. That might be remedied through greater education. [Operator: Australia's North West region]

While there was desire to increase cooperation with other tourism enterprises, various practicalities are a concern for many operators. For a small operator, nurturing enterprise cooperation can be a serious decision, especially given the everyday constraints of operating a remote tourism enterprise. Operators argued:

Time is the big issue for us. Most tourism businesses are small scale and don't have a lot of time to be involved in extra things. [Enterprise 2]

It is very difficult to increase our level of cooperation given the small number of operators here and the distances between us. I don't have the staff etc. to just leave the business for meetings etc. No one else can step into my work. [Enterprise 4]

5.2 Integrating visitor products and experiences

5.2.1 Combining products with other enterprises

Most Aboriginal and Torres Strait Islander tourism operators in this study combine their products with Aboriginal and Torres Strait Islander operators and non-Aboriginal and Torres Strait Islander operators in their region in order to create added value (Table 11).

Combining products with other Aboriginal and Torres Strait Islander tourism operators in their region is practised by 67% of operators, and not practised at all by 33%. This takes place once a week or more for 33% of operators, with the remaining respondents reporting that this occurs on average once a month (13%) or less frequently (21%). Combining products or experiences with non-Aboriginal and Torres Strait Islander tourism operators takes place for 92% of operators. Notably, 64% state that this takes place once a week or more, suggesting that this is a regular component of value creation for many enterprises. Only 8% of operators never combine products and/or experiences with non-Aboriginal and Torres Strait Islander tourism operators in their region.

Table 11: Combining products

Combining products with other enterprises	Never	Yes	1–2 times a year	3–6 times a year	Once a month	Once a week or more
With other Aboriginal and Torres Strait Islander tourism operators	33%	67%	8%	13%	13%	33%
With non-Aboriginal and Torres Strait Islander tourism operators	8%	92%	0	14%	14%	64%

5.2.2 Referrals

Table 12: Referring visitors

Visitor referrals	Never	Yes	1–2 times a year	3–6 times a year	Once a month	Once a week or more
Referrals to other Aboriginal and Torres Strait Islander tourism operators	0	100%	7%	0	20%	73%
Referrals to non–Aboriginal and Torres Strait Islander tourism operators	8%	92%	0	23%	15%	54%
Referrals from other Aboriginal and Torres Strait Islander tourism operators	20%	80%	7%	13%	33%	27%
Referrals from non–Aboriginal and Torres Strait Islander tourism operators	0	100%	0	31%	15%	54%

5.2.2.1 Referring visitors to other enterprises

All respondents refer their visitors to other Aboriginal and Torres Strait Islander tourism enterprises in their region. The majority (73%) refer their visitors once a week or more, while 20% refer visitors to other Aboriginal and Torres Strait Islander tourism enterprises once a month or more (see Table 12).

The majority of respondents (92%) refer visitors to non–Aboriginal and Torres Strait Islander tourism operators in their region. This occurred slightly less often, with 54% indicating they referred visitors to non–Aboriginal and Torres Strait Islander tourism operators once a week or more on average and a further 15% referring their visitors once a month or more.

5.2.2.2 Referrals from other enterprises

Referrals from other Aboriginal and Torres Strait Islander enterprises are received by 80% of enterprises (see Table 12). This occurs an average of once a week or more for 27% of enterprises and once a month for 33% of enterprises. Of the study respondents, 20% state that other Aboriginal and Torres Strait Islander tourism operators never refer visitors to their enterprises.

All operators stated that non–Aboriginal and Torres Strait Islander tourism operators in their region refer visitors to their enterprise. For 54% this takes place an average once a week or more (see Table 12). An additional 15% receive referrals once a month, and 31% receive referred visitors 3–6 times a year.

5.2.3 Membership to cooperating groups

Table 13: Cooperating in tourism enterprise groups

Membership of a cooperating group	Yes	No
Member of a cooperating group	73%	27%
Aboriginal and Torres Strait Islander tourism enterprise group	50%	50%
Non-Aboriginal and Torres Strait Islander tourism enterprise group	69%	31%
Member of both groups	20%	80%

Respondents were asked about their membership to Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander tourism groups in their region. Almost three-quarters (73%) are members of a cooperating group of enterprises (see Table 13). One-fifth (20%) belong to both an Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander group, while 27% are not part of any group. Half (50%) of the enterprises participating in the study belong to a group of cooperating Aboriginal and Torres Strait Islander tourism enterprises in their region, while the other half do not. Enterprises that are members of an Aboriginal and Torres Strait Islander tourism group are located in five different regions in remote Australia (see Figure 21): Alice Springs, Australia's North West, Kakadu Arnhem, Katherine Daly, and Tropical North Queensland.

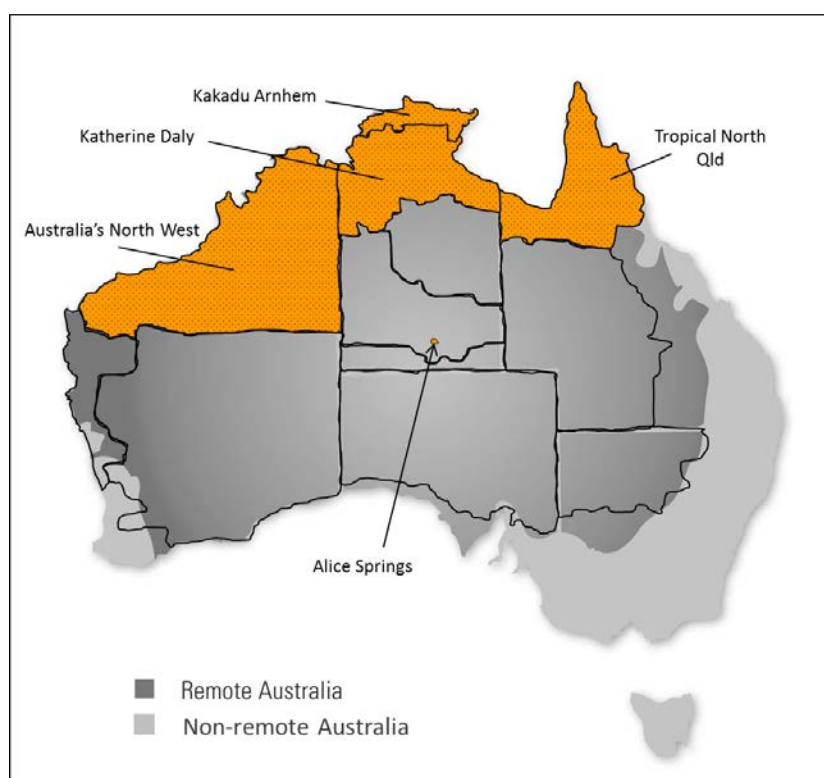


Figure 21: Regions with cooperating groups of Aboriginal and Torres Strait Islander tourism enterprises

Around 69% of enterprises belong to a group of non-Aboriginal and Torres Strait Islander tourism enterprises in their region. Figure 22 shows that these enterprises are located in six different regions of remote Australia: Australia's North West, Kakadu Arnhem, Katherine Daly, Tropical North Queensland, Outback NSW and Tableland (NT). While appearing to be more widespread than cooperating groups of

Aboriginal and Torres Strait Islander tourism enterprises, the presence or extent of membership to non-Aboriginal and Torres Strait Islander groups in the remaining remote tourism regions remains unclear.

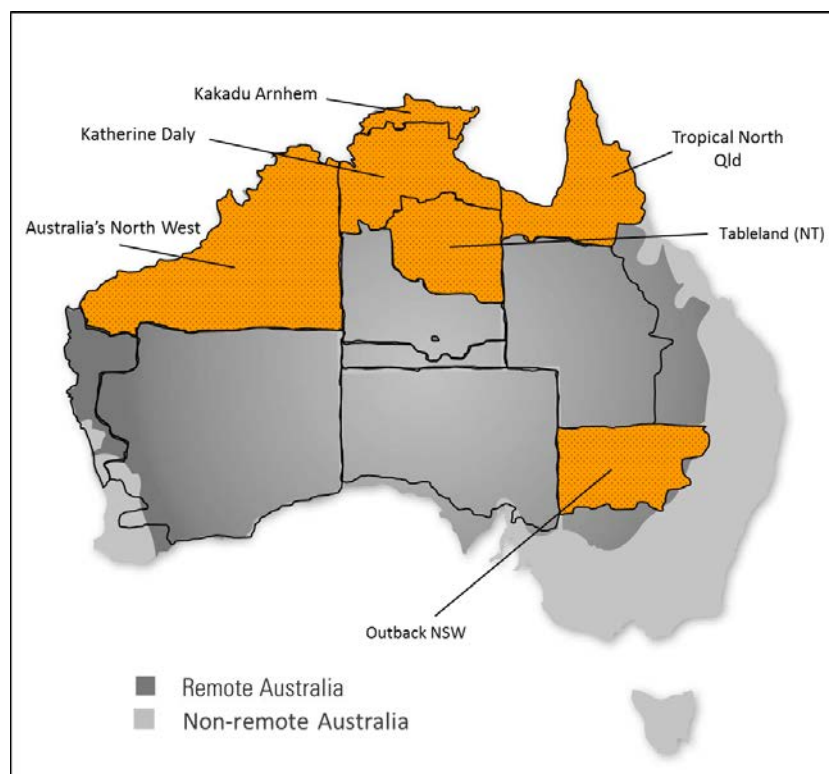


Figure 22: Regions where Aboriginal and Torres Strait Islander remote tourism enterprises are part of cooperating groups of non-Aboriginal and Torres Strait Islander tourism enterprises

Cooperation between enterprises can present some challenges. To this end, some operators provided insight into achieving the appropriate ‘formula’ in enterprise group cooperation to make it work:

The best cooperation is where people are supportive. Operators need their independence and to have ownership of what’s happening – making their own decisions is important and caring for family. Cooperation should be about supporting each other to grow. We all get on well here, but people have their differences and it can get bogged down in relationships or politics and differences of opinion. [Operator: Australia’s North West region]

These comments raise the need for mutuality, active engagement, shared goals, interdependency, supportiveness and a framework for the group that transcends each individual. These comments also suggest that each enterprise needs to retain their independence and commitment to their own objectives.

5.2.4 Group leadership

Leadership can play a role in ensuring groups are cohesive and productive. Participants who indicated that their enterprise is a member of a cooperating group of tourism enterprises in their region were asked to assess the strength of their group’s leadership (1 being ‘Very weak’ and 5 being ‘Very strong’). As Table 14 shows, the leadership of both Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander tourism enterprise groups is quite strong.

Table 14: Leadership of tourism enterprise groups

Strength of group leadership	Very strong	Strong	Fair	Weak	Very weak
Aboriginal and Torres Strait Islander industry group (n=7)	43%	14%	29%	14%	0
Non-Aboriginal and Torres Strait Islander industry group (n=10)	40%	10%	40%	10%	0

5.3 Meeting activity

5.3.1 Informal meetings

The majority of operators (87%) meet informally with other Aboriginal and Torres Strait Islander tourism operators in their region (see Table 15). Only 7% meet informally once a week or more; the highest proportion of respondents (40%) indicated that this takes place an average of 3–6 times a year. Also of note was that 13% of operators do not have any informal meetings with other Aboriginal and Torres Strait Islander tourism operators in their region.

Table 15: Informal meetings

Informal meetings	Never	Yes	1–2 times a year	3–6 times a year	Once a month	Once a week or more
With other Aboriginal and Torres Strait Islander tourism operators	13%	87%	20%	40%	20%	7%
With non-Aboriginal and Torres Strait Islander tourism operators	7%	93%	14%	50%	29%	0

Of the study respondents, 93% meet informally with non-Aboriginal and Torres Strait Islander tourism operators in their region (see Table 15). For 50% of respondents this occurs an average of 3–6 times a year. Only 7% do not meet informally with non-Aboriginal and Torres Strait Islander tourism operators. Overall, informal meetings appear to be an important way for many Aboriginal and Torres Strait Islander tourism operators to meet with other operators in remote Australia.

5.3.2 Scheduled business meetings

Scheduled business meetings also appear to be important information channels for Aboriginal and Torres Strait Islander tourism operators in remote regions. The overall frequency of scheduled business meetings with tourism operators is lower than for informal meetings, with the difference more pronounced among Aboriginal and Torres Strait Islander operators (see Table 16). One-third (33%) never have scheduled business meetings with other Aboriginal and Torres Strait Islander tourism operators. The remaining respondents hold scheduled business meetings an average of 1–2 times a year (20%), 3–6 times a year (27%) or once a month (20%).

Scheduled business meetings with non-Aboriginal and Torres Strait Islander tourism operators are held by 92% of operators. For the majority of respondents (61%) these meetings occur an average 1–2 times a year. Only 8% reported never having scheduled business meetings with non-Aboriginal and Torres Strait Islander tourism operators.

Table 16: Scheduled business meetings

Scheduled business meetings	Never	Yes	1-2 times a year	3-6 times a year	Once a month	Once a week or more
With other Aboriginal and Torres Strait Islander tourism operators	33%	67%	20%	27%	20%	0
With non-Aboriginal and Torres Strait Islander tourism operators	8%	92%	61%	23%	8%	0

Study participants noted that remoteness and resource constraints can make meeting informally and formally with other operators difficult. There may be desire to participate in meetings, but the realities of running an SME in remote Australia can mean that there are various costs associated with attending meetings. Every meeting must be worthwhile, as the following operator expressed:

We are often so busy we can't go to meetings. We just don't have time. So it needs to be worthwhile. Meetings need to be productive, not just meeting for the sake of meeting. That wastes all our time. [Operator: Australia's North West region]

These comments highlight the need for operators to have shared understandings of the role and outcomes of meetings and to be active contributors in developing shared outcomes from these engagements.

Table 17: Separation between informal and scheduled business meetings

Separation between informal and business meetings	Very important	Important	Moderately important	Of slight importance	Not important
Importance with Aboriginal and Torres Strait Islander operators	14%	29%	29%	21%	7%
Importance with non-Aboriginal and Torres Strait Islander operators	8%	31%	38%	15%	8%

Separation between business meetings and informal meetings is moderately important or important for most enterprises, although results varied from very important for some operators to not important or only of slight importance for others (see Table 17). There was little reported difference between meetings with Aboriginal and Torres Strait Islander tourism operators and non-Aboriginal and Torres Strait Islander tourism operators.

5.4 Business based on culture and community

For the majority of study participants, involvement with their Aboriginal and Torres Strait Islander community is considered to be very important (78%) or important (17%) (see Table 18). The level of importance was measured on a 5-point Likert scale (1 being 'Not important' and 5 being 'Very important'). Only one operator believed this involvement was only moderately important and no operators viewed involvement with their Aboriginal and Torres Strait Islander community as not important or of only slight importance.

Table 18: Community and cultural relationships

Community and cultural relationships	Level of importance				
	Very important	Important	Moderately important	Of slight importance	Not important
Involvement with community					
With Aboriginal and Torres Strait Islander community	78%	17%	5.5%	0	0
With the wider community	72%	17%	11%	0	0
Maintaining cultural relationships					
Importance of cultural relationships	67%	7%	13%	7%	7%
Importance in building business relationships	47%	20%	13%	13%	7%

The majority of operators stated that wider community involvement is very important for their enterprise (72%) and that involvement with the Aboriginal and Torres Strait Islander community is very important (78%). A further 28% indicate that wider community involvement is important (17%) or moderately important (11%). No respondents believed that wider community involvement is not important or only of slight importance.

Maintaining cultural relationships with other Aboriginal and Torres Strait Islander tourism operators in their region is of considerable importance. Two-thirds (67%) of study participants stated that it is very important for their enterprise to maintain cultural relationships with other Aboriginal and Torres Strait Islander tourism operators in their region. A further 20% view cultural relationships as important (7%) or moderately important (13%). Only 14% indicate that cultural relationships are not important or only of slight importance.

In terms of developing business relationships with other Aboriginal and Torres Strait Islander tourism operators, 80% of respondents stated that cultural relationships are very important (47%), important (20%) or moderately important (13%). These findings highlight the role that cultural relationships play for some Aboriginal and Torres Strait Islander tourism enterprise operators in remote Australia. However, these findings also reveal that some operators do not place much importance on cultural relationships to build formal and informal business relationships.

5.5 Enterprise support

5.5.1 Funding and training support

There appears to be much uncertainty about the appropriateness of existing funding, grant and business training programs for tourism. As Table 19 shows, 56.25% of study participants were unsure about the appropriateness of existing funding and grant programs and 31.25% maintain that programs are not appropriate to their needs. While 43.75% are unsure of the appropriateness of existing business training programs, 31.25% argued that these programs are not appropriate to their needs. The high level of uncertainty could be for various reasons, including not having direct experience with available resources. But even so, the findings reveal more dissatisfaction than satisfaction with the appropriateness of existing funding, grant and business training programs.

While funding and grant schemes are constantly changing, various study participants noted discontent with limited funding dedicated to infrastructure to support remote tourism and address shortfalls that constrain their enterprise:

Change of government – unsure of what funding is now available. Matching funding for infrastructure development. Funding for sustainable energy solutions / water tanks.

[Enterprise 6]

This view calls into question whether funding and grant schemes appreciate the practicalities and contexts of tourism enterprises in remote Australia. In the context of business training, some study participants believe that more appropriateness is also needed in the approach to these programs, particularly in the style of delivery:

[Our] people do not speak English as a first language and often literacy and numeracy is poor. This means that we have to develop an appropriate solution for training that is more hands on and accommodates for the lower literacy and numeracy issues. [Enterprise 2]

Table 19: Enterprise funding and training support

Enterprise funding and training support	Yes	No	Unsure
Appropriateness of existing funding and grant programs	12.5%	31.25%	56.25%
Appropriateness of existing business training programs	25%	31.25%	43.75%

Appropriateness in delivery is, at least partially, a matter of creating learning spaces that recognise the diverse backgrounds of participants. As one respondent put it, a more appropriate approach would involve ‘more intimate interaction and practical workshops instead of boring lectures’. This is not just a matter of designing workshops or training seminars; it includes paying attention to the experience and background of facilitators, trainers and participants. Study participants viewed training as being more than just workshops or seminars; they also considered other sources such as TAFE.

5.5.2 Funding and training support for industry cooperation in remote Australia

A high percentage of respondents were uncertain about the sufficiency of government support and available training for enterprise cooperation (see Table 20). One-fifth (20%) of operators felt that government support for enterprise cooperation is sufficient, but more (33%) said that it is not. One respondent, for example, said that while their enterprise has received government support in the past, it has often been unsympathetic to their challenges or unreliable in the long term:

We belong to [a regional tourism association]. They tend to concentrate their focus on tourism enterprises around [their main tourism hub]. It is difficult to attend meetings in [the tourism hub] – it requires a 1000 kilometre round trip, plus time away and costs. [Our nearby tourism region] and [closest town] has not had a tourism representative based here for some time and our tourism association not being funded has meant that the functions have ground to a halt. We also belonged to an Indigenous tourism hub which was funded by [our state tourism agency]. It is no longer funded or operating. It also had mainly Indigenous tourism operators [based in the main tourism hub] and meetings were held in [the main tourism hub as well]. We did, however, get regular e-mails and occasional visits. NO, THERE IS NOT SUFFICIENT GOV SUPPORT TO DEVELOP COOPERATION BETWEEN TOURISM ENTERPRISES IN OUR REGION – either Indigenous or non-Indigenous. (emphasis in the original, place names have been changed to maintain respondent anonymity.) [Enterprise 6]

Table 20: Training and support for enterprise cooperation

Funding and training support for enterprise cooperation	Yes	No	Unsure
Sufficient level of government support for enterprise cooperation	20%	33%	47%
Sufficient level of available training for enterprise cooperation	7%	40%	53%

The experiences reported by this respondent highlight that while resources have been allocated to remote enterprise cooperation, the programs in question may not be sensitive to the practical challenges of operators. This respondent also reports that policy and broader tourism strategies have flow-on effects, particularly when tourism development or representatives in a remote area do not receive ongoing funding. This respondent draws attention to government support needing to be reliable, long-term and appropriate to the practical realities of remote tourism.

In relation to training support for enterprise cooperation, 40% of operators indicated that it is insufficient, and only 7% felt it was sufficient. A further half of respondents were unsure, perhaps indicating that they may have limited knowledge about support for enterprise cooperation. Some study participants questioned whether the resources that are available actually reach Aboriginal and Torres Strait Islander operators:

Non-Indigenous RTO's take black funding without providing proper training; funding for Indigenous people should go to the right people. Regional Indigenous organisations also fail to provide the right assistance, although funded for that specific reason. [Enterprise 8]

Perspectives on how support for enterprise cooperation might be improved were varied, covering practical and broader concerns. Some study participants raised a need for hands-on facilitation in forming and nurturing cooperative groups. One operator discussed the difficulties of making their cooperative group work without appropriate facilitation:

It could have been improved. It needed to work better. We needed a better structure and a road map. We needed guidance on how to make it all work and someone to hold it all together. Not necessarily a leader but someone to arrange things and set agendas and guide us though it all so we all get something out of it. That could be an administrative-type person because we are all busy and have to drive long distances. You can spend a lot of time going to meetings and get nowhere. [Enterprise 6]

Respondent comments highlight that with many players involved, there is a need for structure, coordination and effective support to ensure industry cooperation works, especially given the challenges and limited resources of remote SMEs.

5.6 Sector industry value chain assessment summary

5.6.1 Cooperative activities

Enterprise cooperation is common for many study participants. The majority indicated that cooperation, either with Aboriginal and Torres Strait Islander or non-Aboriginal and Torres Strait Islander tourism enterprises, is important to very important for enterprise competitiveness and for marketing and promotion. The majority of respondents are members of a cooperating group of Aboriginal and Torres Strait Islander tourism enterprises and/or non-Aboriginal and Torres Strait Islander tourism enterprises in their region. However, almost one-third of enterprises do not belong to a group of cooperating enterprises.

Additionally, some operators discussed the relationship difficulties that can arise in cooperative groups and argued that relationships need to be managed well to ensure benefits are enjoyed by each enterprise. While

the leadership of cooperating groups in the study was reported as fair to strong overall, the findings reflect that enterprise cooperation is often not a straightforward process.

The majority of study participants expressed a desire to increase cooperation with other tourism enterprises in their region. Operators suggested that greater interconnectedness between enterprises in remote tourism would distribute benefits more widely among a greater number of operators and community, as well as strengthen the competitiveness and wellbeing of their region as a whole. This reinforces the strong community-mindedness of these operators and is linked to the importance they place on being involved with their communities. However, the practical challenges of small enterprises in remote Australia mean that support is needed for the appropriate facilitation of long-term enterprise cooperation.

5.6.2 Integrating visitor products and experiences

The majority of Aboriginal and Torres Strait Islander tourism operators in this study regularly combine their products with other Aboriginal and Torres Strait Islander operators and non-Aboriginal and Torres Strait Islander operators in their region. All operators in the study regularly refer visitors on to other Aboriginal and Torres Strait Islander tourism operators, while referrals to non-Aboriginal and Torres Strait Islander tourism enterprises occur only marginally less often.

The commonness of referring highlights willingness, in this case in less formalised ways, to link products and experiences to create opportunities for each other. Study participant perceptions of referrals to their enterprise were more varied. All operators received referrals from non-Aboriginal and Torres Strait Islander enterprises in their region. Most also received referred visitors from other Aboriginal and Torres Strait Islander enterprises, although some maintained that they do not. Most operators seemed to refer visitors at a greater rate than visitors were referred to them. While this suggests that reciprocity may need to be addressed, there may also be a need for operators to track referrals and assess the economic worth of this activity. Developing these kinds of low-cost enterprise cooperation linkages can encourage reciprocity, mutual loyalty and beneficial support.

5.6.3 Meeting activity

The majority of study participants met formally and informally with other Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander tourism operators in their regions. The regularity of these meetings suggests that opportunities for communication are fairly strong and are maintained, although examining the depth and quality of the information exchanged during these meetings was beyond the scope of the present study. Meetings can be important in maintaining industry linkages and building enterprise knowledge. Most operators found ways to meet regularly, despite the reported challenges of remote Australia noted in Section 3.5.

Meeting informally was more common for operators, with a number not having scheduled business meetings at all. Separation between business and informal meetings was of importance for some operators, while for others it was not so important. Overall, these findings show that Aboriginal and Torres Strait Islander tourism operators in remote Australia recognise the importance of meeting regularly with other tourism operators in their region. However, operators emphasised that meetings and other gatherings must be worthwhile and provide benefits that outweigh the costs involved.

5.6.4 Community and culture in business

Relationships with their Aboriginal and Torres Strait Islander community and with the wider community in their region are considered very important by the majority of study participants. All study participants indicated that involvement with community is important, at least to some degree. Culture is important for

business between most Aboriginal and Torres Strait Islander enterprises; however, some study participants have business relationships where culture is not a factor. These findings reinforce the role that cultural relationships play for many, but not all, Aboriginal and Torres Strait Islander tourism enterprise operators in remote Australia. What culture refers to in this context is unclear and may not be the same from one place to the next. Even so, Table 4 indicates that many Aboriginal operators help each other with business advice and support. Indeed, the role of Aboriginal and Torres Strait Islander enterprise groups may also play a part here. This may be related to culture and based on shared understanding of why people get into business and a shared appreciation of operating tourism SMEs in remote Australia.

The role of culture in business relationships between Aboriginal and Torres Strait Islander enterprises requires further inquiry, especially to do with how culture shapes business principles, ethics, commitment, models, competitiveness and enterprise strategy.

5.6.5 External support

When questioned about business training, funding and grant programs, over one-third of operators stated that current programs are not appropriate to the needs of Aboriginal and Torres Strait Islander tourism enterprises in remote regions. Understanding the practicalities and constraints of tourism enterprise in remote Australia should be the basis of support programs if they are to be appropriate and match the needs of enterprises. The appropriateness of training programs was a particular concern for many operators, who noted there are often issues with the availability and delivery of training that is inclusive and appropriate to the diverse backgrounds, experiences and abilities of participants.

Greater support for industry cooperation was also identified as an area of need. One-third of study participants stated that the current government support for industry cooperation is insufficient and that training is lacking. Study participants highlighted a disconnect between support agencies and argued that government support needs to be reliable, long-term and appropriate to the practical realities of tourism in remote Australia. Respondents pointed to a need for facilitation in forming and maintaining cooperative groups, especially given the challenges and limited resources of remote SMEs. The findings also suggest an opportunity to improve the availability, delivery and content of training for enterprise cooperation, particularly for hands-on training appropriate to the needs of participants.

5.6.6 Sector industry value chain assessment: key findings in brief

The key findings from the Aboriginal and Torres Strait Islander remote tourism enterprises in this study of the assessment of industry value chain activity are:

- 87.5% engage in enterprise cooperation
- 92% report that cooperation improves the competitiveness of their enterprises in remote Australia
- 87.5% want to increase enterprise cooperation with Aboriginal and/or non-Aboriginal and Torres Strait Islander tourism enterprises
- visitor referral is common between Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander enterprises in remote Australia, but there is some concern about reciprocity
- 73% are part of cooperating enterprise groups
- cooperating groups of Aboriginal and Torres Strait Islander remote tourism enterprises are established in northern and central Australia, but the extent of activity in other regions is unclear
- it is more common for operators in this study to be part of non-Aboriginal and Torres Strait Islander enterprise groups

- enterprise group leadership is fairly strong, but some concerns were raised about the long-term structures and facilitation of those groups
- 64% regularly combine their products and experiences with other enterprises in their region
- it is more common for Aboriginal and Torres Strait Islander remote tourism enterprises to hold informal rather than scheduled business meetings with other operators in their region
- maintaining cultural relationships is important for most Aboriginal and Torres Strait Islander remote tourism enterprises
- culture is important for business between most Aboriginal and Torres Strait Islander enterprises, but for some enterprises culture is less of a factor in these relationships
- community (Aboriginal and Torres Strait Islander and non-Aboriginal and Torres Strait Islander) is very important for Aboriginal and Torres Strait Islander remote tourism enterprises
- there is a great deal of uncertainty in the sector about government support and available training for cooperation between Aboriginal and Torres Strait Islander remote tourism enterprises, but for enterprises with insight into these issues, there is more disagreement than agreement that resources are appropriate.
- existing business training and funding schemes need to focus more on the needs of Aboriginal and Torres Strait Islander remote tourism operators.

6. Conclusion

This study was part of CRC-REP efforts to improve insight into Aboriginal and Torres Strait Islander tourism enterprises in remote Australia, particularly their unique business situations and how these enterprises make the most of available resources to create value for their visitors. The study has shown that these enterprises operate in a range of challenging contexts in addition to localised situations that create enterprise operating environments that differ from one region to the next. Creating value for visitors is more than product diversification or comparative advantage; it also includes a range of cooperative strategies with other enterprises in an enterprise's region to coordinate their products and create industry value chain synergies. The findings from this study support the broad notion that Aboriginal and Torres Strait Islander remote tourism enterprises are embedded within destination tourism systems despite geographic isolation and other factors that characterise remote Australia.

The study analysed the value-creation strategies of Aboriginal and Torres Strait Islander tourism enterprises in remote Australia by addressing several objectives. First, the study presented a range of background information, including the challenges, products and experiences and additional value-adding approaches of a sample of enterprises. Value-creation configurations were subsequently mapped for each enterprise to demonstrate the complex and diverse processes of creating value for tourists in remote Australia. The range of value-creating processes indicates the numerous adaptations likely in response to available opportunities, resources and innovative capacity. The heterogeneity of Aboriginal and Torres Strait Islander tourism enterprises was observed in the high incidence of product diversification, the development of products and experiences corresponding to diverse components of destination tourism systems and the varied value chains.

Assessment of the industry value chain activity in the Aboriginal and Torres Strait Islander remote tourism sector generated various insights into value-creating approaches based on enterprise cooperation. Indeed, the findings indicate that enterprise cooperation is willingly practised by numerous Aboriginal and Torres Strait Islander tourism enterprises in remote Australia and they recognise the contribution of this activity to

the competitiveness of their enterprises; the majority desire for their enterprise cooperation to increase. Importantly, the findings indicate that many enterprises have a strong level of cooperation with other Aboriginal and Torres Strait Islander tourism enterprises, and on some factors they have even stronger cooperation with non-Aboriginal and Torres Strait Islander tourism enterprises.

This study has shed light on existing cooperating enterprise groups in remote Australia. While it was beyond the scope of this study to refer to these groups as ‘clusters’, the study shows that Aboriginal and Torres Strait Islander remote tourism enterprise groups exist in central and various parts of northern Australia. Indeed, the findings indicate that membership to a group of cooperating enterprises (either Aboriginal or non-Aboriginal and Torres Strait Islander enterprises) is relatively common among Aboriginal and Torres Strait Islander remote tourism enterprises that participated in this study. The results also reveal that the majority of enterprises place strong importance on their cultural relationships with other Aboriginal and Torres Strait Islander tourism operators, and strong importance on maintaining links with their wider and Aboriginal and Torres Strait Islander communities.

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