



QUEENSLAND
TOURISM INDUSTRY
COUNCIL

THE ESTABLISHMENT OF A SUSTAINABLE FIRST NATIONS TOURISM PEAK BODY

DISCUSSION PAPER

April 2021



Year of
Indigenous
Tourism

Table of Contents

QUEENSLAND TOURISM INDUSTRY COUNCIL	3
THE TOURISM INDUSTRY	3
FIRST NATIONS TOURISM	4
First Nations Tourism in Queensland	5
Queensland First Nations Tourism Plan.....	6
The Six Tourism Pillars of the Plan	6
Consultation Process	7
Establishment of a Tourism Peak Body	7



QUEENSLAND TOURISM INDUSTRY COUNCIL

The Queensland Tourism Industry Council (QTIC) welcomes the opportunity to respond to the Queensland Small Business Strategy, Discussion Paper, released in November 2019 by the Department of Employment, Small Business and Training.

QTIC was established in 2001 as an independent, private sector, membership-based tourism industry organisation. Queensland's thirteen Regional Tourism Organisations (RTOs) are members of QTIC, as are eighteen industry sector associations. With QTIC membership comprising more than 1,000 tourism businesses across the state, alongside the RTO network representing more than 3,000 regional businesses.

QTIC is a member of The Australian Tourism Industry Council (ATIC) and Queensland's peak body for tourism. QTIC represents a range of sectors across the Queensland tourism and hospitality industry, operating in partnership with government agencies and industry bodies at a local, state and national level.

THE TOURISM INDUSTRY

According to the World Travel and Tourism Council (WTT), over the past five years, one in four new jobs were created by the travel and tourism sector and in 2019, the sector experienced a 3.5% growth which outpaced the global economic growth of 2.5% for the ninth consecutive year ([WTTTC, 2021](#)). The direct contribution of the sector accounted for 3.3% of the total global GDP in 2019 with the total contribution of the travel and tourism industry accounting for 10.4% of the total GDP worldwide ([Statista, 2021](#)).

The World Travel and Tourism Council (WTTTC) projected travel and tourism employment would grow 5.8% over the next decade in the Asia Pacific region. In contrast, total economic growth was projected at 4.1% per annum while other industries such as mining and agriculture were forecast to grow at 1.8% and 2.2% per annum respectively. In Australia, the total five-year average annual growth was 4.4%, or 3.8% over 10 years. This compares to the five-year average growth rate for total visitor nights in Queensland which was projected to be 3.9% over 10 years.

However, at the beginning of 2020, the tourism industry across the Asia Pacific region experienced the consequences of the unexpected outbreak of the novel coronavirus (COVID-19) and countries throughout the region experienced dramatic tourist arrival decreases ([Statista, 2021](#)). The United Nations World Tourism Organisation (UNWTO) reported that destinations worldwide received 1 billion less international arrivals in 2020 compared to the previous year ([UNWTO, 2021](#)). Nevertheless, as the world recovers from COVID-19 pandemic the WTTTC maintains more than 100 million jobs could return to the global travel & tourism sector during 2021 (WTTTC).

Queensland tourism suffered as a result of the pandemic, with reports at year ending December 2020 showing domestic overnight visitor expenditure decreased by 39.4 per cent year on year to \$11.8 billion, on the back of visitation decreasing by 35.0 per cent to 16.9m ([TEQ, 2020](#)). In contrast, the tourism industry in Queensland contributed \$27.3 billion to Queensland's Gross State Product (GSP) year ending June 2018 ([QLD Government, 2021](#)) representing 7.8% of total GSP.



The industry also generated \$7.5 billion in exports, making it the State's second largest export accounting for 10.1% of total Queensland exports.

The Queensland tourism industry consists of over 55,000 tourism businesses operating across the State. Nine out of ten of these tourism businesses are small businesses supporting employment for over 237,000 Queenslanders. Positions in cafes, restaurants and takeaway food services constitute the largest share of direct tourism employment (i.e., 41,000 jobs), followed by retail trade (i.e., 25,000 jobs) and accommodation (i.e., 19,000 jobs). For instance, in Townsville, there are over 2,070 tourism businesses, the majority of which are SMEs (93%), with 145 businesses employing more than 20 staff.

On an average day in Queensland (pre-COVID), there were approximately 149,000 international visitors spending \$16 million a day. There were 265,000 domestic visitors, spending \$50 million daily and 128,000 day trippers. Therefore, on a daily basis, over half a million people were away from their place of residence and seeking experiences, food, drink and accommodation in Queensland. Currently, with restrictions on international arrivals still in place, international figures have declined by more than 50 per cent, and domestic figures are down by close to 24%. Domestic interstate travel to Queensland also suffered a drastic decrease, with both visitation and overnight visitor expenditure down by 69 per cent ([TEQ, 2021](#)), attributable to uncertainty around border closures. More promising figures were seen in Queensland's intrastate travel, where although visitation was down 3.5 per cent, overnight visitor expenditure increased by 15.8 per cent ([TEQ, 2021](#)).

FIRST NATIONS TOURISM

The UN World Tourism Organisation estimates that 47% of tourists worldwide are motivated by a desire to experience the cultures and heritage of a country and the most likely international visitors to participate in a First Nations tourism experience in Australia are from the UK, USA and Europe.

In a highly competitive global marketplace, First Nations tourism experiences provide a point of differentiation for Australia and have been identified as an important value-add alongside Australia's core strengths of aquatic and coastal, food and wine and nature and wildlife activities. Tourism Australia's Consumer Demand Project (CDP) showed a 30% increase from 2014-2015 in consumers' interest in Australia's First Nations tourism experiences and approximately 1.04 million visitors undertook some form of First Nations tourism activity during their holiday in Australia, representing 14% of total international visitors (IVS Jun 2016). In 2019, Australia's First Nations tourism had an estimated value of \$5.8 billion annually ([Office for the Arts, 2020](#)); and catered to 1.15 million international visitors and 674,000 overnight domestic trips in 2018 (Tourism Research Australia). The research also highlights that following exposure to marketing stimulus, visitors' willingness to participate in First Nations cultural experiences realised an upward shift in demand.

This reiterates the potential for generating strong demand for tourism experiences provided by the First Nations tourism sector in Australia. Moreover, the CDP revealed several individual First Nations tourism experiences are not only highly appealing compared to non-Indigenous tourism



experiences, but there are also several First Nations tourism experiences that have been deemed the most preferred tourism experiences in their regions.

First Nations Tourism in Queensland

2021 is the Year of Indigenous Tourism in Queensland. It is a year for us to celebrate and share a myriad of First Nations tourism experiences which are influenced by, and created from, a 60,000-80,000 year history, unique tangible and intangible cultural heritage, diverse cultures, languages and traditions. QTIC recognises and respects First Nations stewardship of country and supports all efforts to value, protect and promote First Nations knowledges, cultures and traditions. 2021 therefore, provides us with a significant opportunity to promote the oldest living culture on earth through the engagement of Traditional Owners and the support of new product development across the region.

Tourism represents a substantive opportunity for First Nations advancement. It offers viable pathways, not only for socio-cultural and employment opportunities but also for innovative business creation and the entrepreneurial capacity building of First Peoples across the State. However, it is important for the sustainability of the First Nations tourism sector, that tourism growth and development in the sector are created and driven by First Nations people and built on strong partnerships with industry and government. Therefore, as we continue to develop stronger partnerships between First Nations people and other tourism stakeholders, 2021 also presents us with an opportunity to further increase demand for First Nations tourism in Queensland and Australia, which globally, visitors only rank 105th as a 'go to' destination for cultural and heritage experiences.

In Queensland 2018/19, 12% of international visitors had a First Nations tourism experience, which represents 4% growth from the previous year ([Tourism and Events Queensland](#)). Therefore there is ample opportunity for realising growth in Queensland's First Nations tourism sector, however to realise any long term, sustainable socio-economic benefits for First Nations peoples, sustainable development must be based on sound, market-driven business cases which are couched within the opportunities and constraints of the tourism industry market. Developing First Nations businesses without appropriate business cases is not sustainable, nor will it strengthen the positioning of the sector.

The launch of the *First Nations Tourism Plan* for Queensland in late 2019 provided a guiding framework for the sustainable growth of the sector. Opportunities to support the growth and development of First Nations Tourism throughout Queensland should be framed around this Plan and aligned with regional needs. The Plan was developed within QTIC but was led entirely by First Peoples representatives and an integral part of the planning and development process of the Plan was the implementation of a suite of regional consultations which took place throughout Queensland with First Peoples community and with the tourism industry.



Queensland First Nations Tourism Plan

In 2011 QTIC established The Indigenous Tourism Forum as a platform to grow and develop industry collaboration. In 2019, hosted by the QTIC Indigenous Tourism Champions Network, the Indigenous Tourism Forum was renamed Destination IQ, to align with the DestinationQ events which are presented in partnership by the Department of State Development, Tourism and Innovation, the QTIC and Tourism and Events Queensland.

The purpose of Destination IQ is to bring together business leaders, employers, government representatives, tourism organisations, native title holders and community organisations to discuss important issues, opportunities and strategies for supporting Indigenous tourism growth and Indigenous employment across the State. Therefore over several years, the Indigenous Tourism Forums and subsequent Destination IQ forums have generated significant discussions that have contributed to the genesis of Queensland's First Nations Tourism Plan.

In 2019, an all-Indigenous stakeholder group was established by the QTIC Board to develop the inaugural, Queensland First Nations Tourism Plan. The Plan was created and developed through a rigorous process which involved extensive, State-wide consultations with First People stakeholders and industry. The Plan was formally launched at Destination IQ by the Queensland State Minister for Tourism, Kate Jones in November 2019. The Queensland Government were fully supportive of the development of the Plan, assisting with consultation costs and approving QTICs proposal to the Premier of Queensland, to declare 2020, the Year of Indigenous Tourism at the 2019 Queensland Tourism Awards while concomitantly, providing an investment of \$10 million in initiatives to support the aspirations of the Plan during the Year of Indigenous Tourism.

The Six Tourism Pillars of the Plan

The Plan focuses on growing an innovative and sustainable First Nations tourism sector in Queensland by drawing on the stewardship of culture and country and building capacity to foster the development of authentic, engaging and sustainable tourism experiences that respect First Nations cultures, knowledges and connections to country.

The Plan is underpinned by the principles of the 2012 Larrakia Declaration and is scaffolded by six tourism pillars which emerged from State-wide consultations undertaken over a 12-month period with First Nations people across Queensland. The six tourism pillars are:

Recognition and Respect
Engagement and Partnerships
Authentic Product Development

Training Skills Development and Jobs
Marketing and Awareness
Strategic Coordination and Structure

Strategic Coordination and Structure: *Create an entity that gives voice to the First Nations tourism sector and provides advocacy and support.*

Recognising international best practice, a First Nations tourism body will be established to:

- provide a coordinated voice for advocacy, leadership and representation and drive the vision of First Nations tourism in Queensland; and
- facilitate collaboration between First Nations tourism businesses and the tourism industry on destination, business and product development.



Consultation Process

To action the Strategic Coordination and Structure Pillar, QTIC is implementing a state-wide consultation process and to ensure as many First Nations people are involved, QTIC and the First Nations Working Group will conduct a series of round tables consultations with invited stakeholders in all Queensland regional destinations and the capital city. An invitation will be distributed to Aboriginal and Torres Strait Islander prescribed body corporates, Land Councils and community groups and the Murri grapevine. All Regional Tourism Operators (RTOs) will be invited to respond to a survey via Survey Monkey.

These consultations are designed to both provide and gather information pertaining to the perspectives and opinions of First Peoples tourism stakeholders. The proposed schedule outlined below is endorsed by the QTIC First Nations Working Group.

This discussion paper will be distributed to stakeholders via QTIC communication channels including the State government website and Tourism and Events Queensland. This discussion paper will also be distributed to:

- RTOs for distribution to their membership;
- the QTIC Network Champions;
- the First Nations Tourism working group and
- the QTIC membership base (which includes FN operators).

Establishment of a Tourism Peak Body

We are seeking your thoughts on the ultimate size and structure of a representative First Nations tourism peak body which will look after the aspirations of First Nations tourism operators in Queensland. Your views will be considered via online and face to face conversations and consultation. We urge you to participate in one of the information gathering surveys.

This discussion paper includes a link to a survey that seeks your views on the establishment of the Queensland First Nations tourism peak body. We encourage you to complete the survey and go into a draw for a ticket to Destination IQ? 10 November 2021 in Brisbane. The survey link is also on the QTIC website here

The survey will be seeking your views around a range of areas including:

- Governance structures
- Administrative and financial frameworks
- Business plan, including ongoing industry engagement strategies
- Appointments for key positions through a transparent merit-based process
- Proposed ongoing funding model
- Communication plan including website and social media

More specifically, we would like to know:

1. What should the objectives of the Council be?
 - a) Advocacy for Qld FN Tourism



- b) Promotion of Qld FN Tourism
 - c) Accreditation of Qld FN Tourism
 - d) Support of Qld FN Tourism operators (training, financial)
 - e) All of the above
 - f) Other?
2. What should the name of the Council be?
- a) First Nations Tourism Council of Qld?
 - b) First Nations Tourism Council (Qld)?
 - c) Queensland First Nations Tourism Council?
 - d) Queensland Indigenous Tourism Council?
 - e) Other?
3. Should there be different classes of membership?
- a) FN Small Business?
 - b) FN Big Business?
 - c) FN Start-up?
 - d) FN Individuals?
 - e) Associates?
 - f) Others?
4. Should there be a cost (membership fee) for membership or certain classes of membership?
It is recommended that there be 10 directors comprised of 1 chairperson plus 3 directors from three divisions North/South/West. However, it may be appropriate to reconsider the divisions once the federal government establishes a regional voice structure? Do you have any views?
5. Should the government fund some or the whole of the operational costs of the Council?
If not, how should funding be obtained?
6. How closely should the Council be aligned with the QTIC:
- a) As partner only?
 - b) As partner with co-location?
 - c) As partner with co-location and shared services?
 - d) Other?

Closing date for taking the survey.....Friday 30 July 2021.

