SOUTH AUSTRALIAN TOURISM PLAN
2009 - 2014

MESSAGE FROM THE PREMIER

The South Australian Tourism Plan 2009-2014 is an important and highly strategic document that sets out an ambitious blueprint to increase the value of tourism in the State to $6.3 billion within the next six years.

I applaud everyone involved in South Australia’s tourism industry for accepting this challenge, and for the sector’s increasingly professional and collaborative approach to overcoming obstacles and making the most of growth opportunities.

The South Australian Government is committed to building a highly profitable and sustainable tourism industry for our State, and I’m delighted that our industry shares these objectives.

Together, we have made outstanding gains in recent years, but we must also face significant challenges in the years ahead.

Ongoing success will rely on clarity of vision, collaboration and a whole-of-government approach as we increasingly build South Australia’s appeal in a fiercely competitive national and global tourism marketplace.

South Australia has long been renowned as a progressive and innovative State, and this document reaffirms our capacity to build on our inherent strength, which is, a tourism industry that’s big enough to be diverse, innovative and brilliant, yet small enough to be sustainable, authentic and thoroughly engaging.

I look forward to working closely with the tourism industry as we add another exciting chapter to this great South Australian success story.

Mike Rann
Premier of South Australia
MESSAGE FROM THE MINISTER FOR TOURISM

Tourism is good for business, for employment and for the social and economic development of South Australia.

That is why it is so important that we have a clear and collaborative plan for the future. The South Australian Tourism Plan 2009-2014 builds on our strengths and ensures we continue to develop a sustainable tourism industry in South Australia.

We have a strong tradition of strategic planning for tourism. Since 1981, successive governments have worked together with the industry. Our common goals have been to identify a shared vision and to have a clear sense of purpose to achieve sustainable tourism growth.

Tourism has always been a tough, competitive business. While South Australia has long punched above its weight, both nationally and internationally, we face many challenges.

As we look to the future the need to be smarter, more fleet-footed and creative while fine tuning our approach is increasingly important.

There are new consumer patterns emerging that reflect more discerning travellers, while competition is growing from interstate and abroad. These factors demand a more succinct, strategic focus. We need to look harder at what we do and what outcomes we can achieve through our shared investment in people and tourism dollars.

Intelligent, creative and informed action is required to direct our efforts at those markets, consumers, and opportunities which can deliver the best return on our investment.

More than 50 written submissions were put forward during the consultation process for this plan. The wide ranging participation in its development reflects the pride and passion of tourism operators and other interested parties across South Australia.

I commend this strategic, carefully targeted plan, and the industry leaders who have risen to the challenge of helping us to shape a new future through tourism planning.

There is no doubt that by working together and re-focusing our efforts on the actions outlined in this plan, we can achieve great things for tourism and for South Australia. I look forward to working with you as we work together to build South Australia’s appeal as a great place to experience and have a good time.

Dr Jane Lomax-Smith
Minister for Tourism

MESSAGE FROM THE SOUTH AUSTRALIAN TOURISM INDUSTRY

On behalf of South Australia’s tourism operators, we’re proud to endorse this document.

For well over a century, tourism has been the backbone of many South Australian communities, with tourism dollars supporting everything from bakeries and supermarkets to hotels and service stations. We’re passionate about the industry, and its vital role in fostering community pride and keeping regional areas alive. We’re also passionate about the state’s many great, authentic tourism attributes – our wine and food, clean-green nature, wildlife, amazing landscapes, unrivalled events and the beautiful, cultured city of Adelaide.

This is our opportunity to position the tourism industry as a powerful economic force for the state. Part of the challenge lies in the disparate nature of the industry – 95 per cent of operators run small to medium-sized businesses and we’re spread across one million square kilometres, so it’s often hard to present a strong, united voice. But now, more than ever, we are united in our desire to grow the prosperity and professionalism of this great industry and allow it to reach its full potential.

The visitors of the world deserve to know more about South Australia. It’s time to work together, make some tough strategic decisions, and turn great ideas into reality.

Duncan Mackenzie
Chairman, South Australian Tourism Industry Council
TABLE OF CONTENTS

1. INTRODUCTION
South Australian Tourism Plan 2009-2014
– What is it?
– Why plan?
– What’s different this time?
– What underpins this plan?
– What does it mean to you?
– How does it fit with other plans?
– What are we targeting?
– Our Priorities

2. THE FUTURE
Environmental Scan Summary
Vision
Scorecard

3. FOCUS AND STRATEGY
Key Focus Areas and Thirteen Strategies

4. THE PLAN FOR ACTION OVER THE NEXT SIX YEARS
Communicate
Develop
Leverage
Activate

5. IMPLEMENTATION AND MONITORING

6. OUR STARTING POSITION
Our Performance
Our Audience
Our Brand Strategy

7. ACKNOWLEDGEMENTS
1. INTRODUCTION

THE SOUTH AUSTRALIAN TOURISM PLAN 2009-2014

What is it?

The South Australian Tourism Plan 2009-2014 maps out key strategies for growing the value of the state’s tourism sector. It is inextricably linked to the South Australian Strategic Plan target of creating a $6.3 billion tourism industry by 2014. This is designed to ensure that tourism and tourism related businesses are viable and sustainable.

This plan identifies the industry’s key objectives for the next six years within the broader context of South Australia’s competitive performance and the likely future of tourism, both nationally and globally.

It is a ‘big picture’ document aimed at long-term, sustainable growth. It does not outline detailed steps, but focuses on the significant goals the plan must achieve to drive the entire industry forward. The consultation process revealed that both government and industry prefer this approach. Both are committed to embracing these key goals and delivering the goods.

Why plan?

Competition for the tourism dollar is fierce, the visitor profile is ever-changing and new global and national trends are impacting upon our ability to compete successfully. Locally, South Australia’s ability to make a real impact has been hindered by a large proportion of disparate and marginally profitable operations, and a government body that has tried to be all things to all people.

Indicators suggest that globally there are challenging times ahead, and this will fuel aggressive competition among Australian and international destinations. However, opportunities clearly exist for those willing to recognise and embrace tourism trends, and pursue focused, cohesive goals for future growth. Now more than ever before South Australia needs a well-considered, collaborative and strategic approach.

What’s different this time?

Good planning will always include a vision and a brand, a review of performance and capabilities, and the setting of targets and key audiences.

What’s often overlooked is a clear, simple focus on getting things done. This is the sixth South Australian Tourism Plan and its focus will be on getting things done. The plan deliberately focuses on a small number of significant actions to inspire and engage the industry, and to give South Australia the best shot at achieving our targets in order to deliver more business and profit to the industry.
What underpins this plan?

Sustainability has always been at the heart of tourism planning in South Australia. Throughout the consultation process, the principle of sustainable development was raised repeatedly, as were the key themes of collaboration, quality, authenticity, innovation and growing profitability.

The future of tourism relies on strategic thinking, a shared sense of purpose and a passionate adherence to these core principles.

What does it mean to you?

Tourism Businesses

Tourism businesses often feel removed from such a plan as it paints the picture on a big canvas. For many operators the ‘big picture’ is their own business, their region and perhaps an industry association.

Likewise, the plan’s target audience and actions might seem at odds with the goals of individual businesses. However, a highly strategic plan, which targets a primary audience with clear messages and compelling experiences, will lead our marketing direction and attract a greater share of all visitors.

Just as ‘a rising tide raises all boats’, this approach will improve the overall performance of the industry and create opportunities across the sector. The role of individual operators is to remain competitive in your field, to seize opportunity and be profitable. The SATC will act as a leadership body to help improve supply and stimulate demand.

The Government

A critical factor in the success of this plan will be the adoption of a whole-of-government approach to tourism. Collaboration must be taken to a new level in the tourism industry, and the State Government’s cooperation is vital in many respects.

Funding, policy, research, relationships and case management are needed to deliver new tourism experiences in a clear and consistent manner.

Key government partners will include Environment and Heritage; Trade and Economic Development; Primary Industries and Resources of South Australia; Planning and Local Government; Transport Energy and Infrastructure; Premier and Cabinet; Treasury and Finance; Arts SA; Sport and Recreation; Education and Children’s Services, and Department of Further Education, Employment, Science and Technology.

South Australia’s Councils and Regional Development Boards also play a significant role in their participation, leadership and adoption of principles and actions by which to grow tourism in their part of the state.

The Employee

Tourism is a major employer in South Australia, and this plan serves to reinforce the scope and energy of the industry. People in the tourism industry have shown their passion for the sector and its future, and are eager to work collaboratively to forge a new era of success. The message is simple: opportunities abound in South Australia’s tourism industry – it offers a career path worth pursuing.

The Student

This plan acts as an inspiration for students considering a career in the industry and with its contextual nature, it should also serve as a handy reference tool.

The State Government has established the Food, Tourism and Hospitality Industry Skills Advisory Council to specifically identify workforce trends and emerging skills needs. Its overall aim is to attract and retain a skilled workforce to help drive the future of the industry. For further information on the Council’s work and advice on entering the industry, visit www.fthskillscouncil.com.au.

How does it fit with other plans?

The South Australian Strategic Plan provides the vision and framework for building a prosperous, healthy and sustainable state (see www.stateplan.sa.gov.au). It contains one tourism target: to increase visitor expenditure to $6.3 billion by 2014. This target is built on the South Australian Strategic Plan (SASP) Tourism Implementation Plan.

The South Australian Tourism Plan provides the vision and framework for building a prosperous, healthy and sustainable state (see www.stateplan.sa.gov.au). It contains one tourism target: to increase visitor expenditure to $6.3 billion by 2014. This target is built on the South Australian Tourism Plan (SASP Tourism Implementation Plan). The plan is backed by the Commonwealth Tourism Strategy, which was developed using the Commonwealth Climate Change Adaptation Framework.

Figure 1 shows the relationship between the South Australian Tourism Plan and key tourism planning initiatives at Commonwealth, State, Regional and agency levels. A key goal has been and will continue to be, to ensure alignment of these plans as far as is practicable.

Figure 1: Tourism Planning Framework

<table>
<thead>
<tr>
<th>Commonwealth</th>
<th>State</th>
<th>Tourism Industry</th>
<th>SATC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commonwealth Tourism Strategy</td>
<td>South Australian Strategic Plan (SASP Tourism Implementation Plan)</td>
<td>South Australian Tourism Plan</td>
<td>Corporate Plan</td>
</tr>
<tr>
<td>Various initiatives e.g. National Tourism Incidence Response Plan; National Tourism Investment Strategy; Climate Change Adaptation Framework.</td>
<td>Specific plans e.g. Planning Strategy; State Infrastructure Plan; Transport Plan; Land-use Planning Frameworks; Biodiversity Strategy; Natural Resource Management Plans; Marine Park Plans etc.</td>
<td>SA Tourism Export Strategy</td>
<td>Marketing Plan</td>
</tr>
<tr>
<td>Regional Tourism Plans</td>
<td>Tourism Industry Workforce Strategy</td>
<td>Sustainable Tourism Package</td>
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<td>Individual Operator Business Plans</td>
<td>Major Events Strategy</td>
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<tr>
<td>Group Operational Plans</td>
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</tbody>
</table>
Our Target

The South Australian Strategic Plan tourism target (T1.15) is to “increase visitor expenditure in South Australia’s tourism industry from $3.7 billion in 2002 to $6.3 billion by 2014.”

In 1999, tourism and travel expenditure generated $3.15 billion for South Australia. By 2007 this figure had grown 34 per cent, to $4.2 billion. This represents an annual growth rate of 3.7 per cent per annum and includes the initial impact of GST. Following on from this, between 2000 to 2007 the increase was 13 per cent or 1.7 per cent per annum. By comparison, to achieve the target by 2014 requires 6 per cent per annum average growth.

Figure 2: Competitive Gap between Target and Trend to 2014

The State Government and the South Australian tourism industry aim to close this gap by increasing visitor numbers and length of stay, and more importantly, increasing visitor spending.

‘Appeal testing’ research commissioned by the South Australian Tourism Commission suggests marketing alone won’t close the gap. It shows that communicating the best of South Australia today will achieve $300 million in additional spending, while improving access and developing a more appealing South Australia of tomorrow (experiences, infrastructure, events) will be required to close the remainder of the gap ($3.0bn). This is certainly an audacious target that we are aiming for.

South Australia’s tourism performance, key audience and brand strategy, which underpin this plan, are outlined further in Our Starting Position, Section 6 of this document.

Our Priorities

Every planning process includes a number of key elements, from setting targets and priority target markets, to developing a communication strategy and a vision statement. In this case, it is also vital to understand and tackle the critical imperatives confronting South Australian tourism.

To maximise its potential over the life of the South Australian Tourism Plan 2009-2014, the industry must address the following imperatives:

- **Communicate with impact:** reach consumers with the right message, through the right media at the right time. South Australia has a low preference among the Australian target audience and will need to be more consistent in its spend and message. The SATC and industry need to spend more, market more directly and with greater impact.

- **Develop new signature experiences:** attract investment capital into South Australia and grow/attract events. South Australia needs ‘new news’ and to further develop areas of raw appeal to change our target consumers’ perception of SA. This includes an accent on tourism in the food and wine industries, higher profile of its natural heritage and cultural strengths, links to SA products and services; and further development of areas of appeal including Kangaroo Island, the Murray River and Eyre Peninsula, among others.

- **Improve distribution channels:** cooperatively market with airlines and significant tourism operators and optimise new technology. Motivating people to travel is only one part of growing tourism. We must ensure we are globally and domestically connected via the travel distribution systems (traditional and online). The SATC and industry need to understand and support distribution to ensure we convert more of the business.

- **Improve air access:** particularly direct inbound flights. Adelaide and South Australia is an under-serviced destination. The aim is to grow domestic weekly seat numbers from 70,000 to 100,000 and double international seat numbers. Every new seat into Adelaide is a new opportunity to bring another visitor to this great state.

- **Ensure a positive policy environment:** align the rules with the vision to facilitate new sustainable development. Encourage investors by ensuring that external planning and policy impediments to sustainable tourism development are removed. This will require an all-of-government approach.

- **Build industry capability:** progress to a genuine economic leader; and reduce reliance on government. Real industry leadership is required, including the need for industry to take responsibility for its own development.

James Baillie
Bailie Lodges

Premium experiential development is crucial to the future of tourism in South Australia. A positive policy and planning environment as outlined in this plan will play a major role in removing the barriers for this type of development, and make a significant contribution to the growth of SA tourism industry.

Jeff Ellison
K1 Saflink
2. THE FUTURE

South Australia’s tourism industry cannot control the forces driving global tourism demand, nor its impact on local performance. But it can proactively shape the future by addressing what it can, and adapting to what it cannot. By understanding the strategic context of the industry, and mapping alternative tourism futures, South Australia is better equipped to make decisions on key target markets, destination management, tourism operations and the development of experiences.

ENVIRONMENTAL SCAN SUMMARY

If South Australia is to grow visitor numbers and visitor spend, it is essential that it looks ahead to the factors that are likely to shape future supply and demand in tourism. Below is a summary of the top global issues influencing tourism (the main trends and factors shaping tourism futures) and how the state plans to respond.

Economic Outlook

Tourism demand is driven largely by economic performance. Global uncertainties including financial market corrections and cost impacts of oil prices, especially on aviation, are likely to suppress demand and affect access. Movements in exchange rates can make it more costly to travel, affecting both inbound and outbound markets depending on the position and strength of the Australian Dollar at any given time. While outbound travel to date has boomed, drops in the exchange rate may provide greater incentive for Australian residents to travel within Australia in the shorter to medium term. However, falling consumer and business confidence will suppress discretionary spending on both domestic and international holidays.

There will be difficult times ahead in the short-term. We must use this time to be prepared for when things recover. We must ensure SA holidays are competitive by:

- Focusing on developing world-class experiences
- Focusing on the more ‘resilient’ consumer in these circumstances
- Making it easy to select and add value to our holiday offers
- Increasing emphasis on the intrastate and interstate markets and its needs.

Ageing Population

The first of the baby boomers in the developed world began to retire over the past five years. This segment is growing rapidly and has been enjoying comparatively high retirement incomes and tax benefits. Boomers are embracing their newfound freedom, staying active and have a greater sense of adventure and discovery than their predecessors. Retirees have been driving domestic tourism. Spend by over 55’s increased by 23 per cent (2002-2007), compared with a decline in other age segments.

This plan sets an ambitious target for our industry, but one that is achievable working collaboratively. I’m looking forward to working with the SATC, and the state’s tourism industry to make this goal of $6.3 billion in expenditure by 2014 a reality.

Craig Wickham
Exceptional Kangaroo Island
While there is an expectation that this will continue, almost one in four baby boomer employees now expect to work into their 70’s because of the impact on their retirement savings from ongoing implications of the financial markets. A further 43 per cent of workers in their 50’s are unclear whether they have enough money saved for retirement. Much of this segment is in a balancing phase between the desire to embrace a new found freedom and assessing their own longer term capacity to finance their freedom. There will be an increased need to understand this market segment and its emerging preferences, its capacity to remain a significant traveller and to then meet its needs. Tapping into the desire for learning and a healthy and active lifestyle remains their key, with an appropriate focus toward value. To ensure the long-term sustainability of the domestic tourism industry, we must also encourage more young people to travel.

Labour and Skills

As baby-boomers retire they are leaving behind a huge employment gap. In South Australia this is exacerbated by competition for labour from competitive sectors such as mining and defence. Rising wage costs may force closure of some marginally profitable businesses. This may be tempered by rising unemployment levels predicted over the early stages of this plan.

There is both a need and an opportunity for a whole of tourism industry commitment to ensuring tourism and hospitality is competitive as an employer. This is a key role for an effective tourism industry body, which would have the ability to unlock funding for workforce planning and training.

Rhythm and Balance

Globalisation, technological change and the subsequent increased pace of life are making some people feel uneasy. There is an aspiration to slow down. Leisure activities and holidays are primary ways to achieve this. Simultaneously, there is an emerging reaction to the mental pollution caused by marketers. People will seek out islands of peace to restore mental and physical health. The growth in the ‘body and soul’ wellbeing phenomenon is powerful evidence of this trend. Learning will be one way that people cope with the anxiety of change.

In all the rapid progress, a sense of continuity with the past will also be valued, i.e. a blend of progress with the best of the past. Messages and experiences that are authentic and genuine will be essential. Healthy work life balance will be sought. Offering choice and ‘grounded connectivity’ through slow food, nurturing of relationships and living in balance with the rhythms of the natural world (including stimulation, challenge and inspiration) will meet holiday and short break escape needs. Informing people through ‘education’ and story telling ‘interpretation’ will enrich this experience.

Climate Change and Sustainability

With the Federal Government’s intention to implement the Carbon Pollution Reduction Scheme in 2010, the tourism industry will be exposed to an increase in costs from a broad range of sources. In particular, electricity, gas and transport fuels are expected to rise with the introduction of a carbon scheme. This will impact on tourism operators both directly and indirectly, as the costs of goods and services will increase.

Emissions-intensive goods and services will incur a relatively higher cost. Due to the increase in the costs of transport fuels and the inclusion of domestic air travel (not international), there may be a disincentive to travel, which could impact on the industry. The broad coverage of the carbon scheme will also increase costs associated with waste disposal and the use of refrigeration.

There are opportunities for the industry in terms of increasing efficiency (i.e. reduce the use of resource use), especially energy and waste efficiency. This can lead to promotional and branding opportunities as more carbon conscious tourists seek out low emission tourism options. While this may not be evident in current domestic tourism, corporate and business related forums and functions are increasingly driving change in the tourism industry by applying standards in their product selection criteria.

The Online Phenomenon

Television and internet dominate media use. In 2007, 80 per cent of Australians were online with that figure expected to rise to 83 per cent in 2008. The internet is revolutionising the way we communicate, do business and importantly provide a distribution system for tourism. It will be the main source of information and will shorten the supply chain as tourists purchase products and services directly from the supplier. Even where preference remains in using personal styles of communication to book tourism product, the internet continues to grow and dominate as a tool to assist the decision making process.

This will impact on the use and value of the travel agent and wholesaler, requiring appropriate adaptation and response from these sectors of the industry. As consumer-generated media increase (social networking and online word of mouth), delivery of distinctive, exceptional experiences will be crucial to success.

There must be a quicker uptake of technology among SA operators. Consumers will expect functionality and the message to be compelling and easy to understand. Simplicity of the message will be essential. As information expands, data and message visualisation will be crucial. The use of maps, pictures and symbols to convey complex information or concepts will be important short cuts for an impatient, time poor culture.

Allan Holmes
Department for Environment & Heritage

The new South Australian Tourism Plan is both strategic in its approach, and pragmatic in its plan for implementation. It highlights the tourism potential of South Australia’s wonderful natural environment and the importance of sustainability in the development of the tourism industry. It also recognises the increasing demand for tourism experiences that include high quality “interpretation” of our natural environment and cultural heritage.

1 Mercer Consulting

2 Neilson Online – The Australian Internet and Technology 2007-2008
VISION

Our vision is that:

By 2020 South Australia will have capitalised on its massive tourism potential and will be a world’s best destination supporting a sustainable and profitable industry.

South Australia will reap enormous benefits from developing its leading Australian experiences (e.g. food and wine, major events and the natural environment), along with its vibrant convention and education tourism sector.

The SA experience will be characterised by our:

• Bring to life an authentic South Australian story
• Marriage of heritage with contemporary expression
• Engagement with people on their life journey
• ‘Bundling’ and presentation of quality, value for money, activities
• Excellence in innovative sustainable design
• Provision of choice and exceeding visitor expectations.

South Australia will stick to its message and tell the world about the best we have to offer. It will take partner commitment to new levels.

South Australia’s authentic experiences will be so compelling, it will be our visitors who spread the word about the amazing and memorable time they spent here. South Australia could be their favourite Australian destination.

SCORECARD

A flexible mix of goals is essential for promoting the vision and value of the state’s tourism industry. A successful vision must be backed by achievement. Tourism is a major economic generator for South Australia, and plays a vital role in social and environmental terms. Tourism has the capacity to influence other targets in the South Australian Strategic Plan, and provide simultaneous benefits across the state’s triple bottom line.

Table 1: The Balanced Scorecard

<table>
<thead>
<tr>
<th>ECONOMIC</th>
<th>ENVIRONMENT</th>
<th>SOCIAL</th>
<th>QUALITY</th>
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<tbody>
<tr>
<td>Increase visitor expenditure in South Australia’s tourism industry from $4.2 billion in 2007 to $6.3 billion by 2014.</td>
<td>Achieve world recognised environmental sustainability for 80 per cent of tourism operations by 2014.</td>
<td>Attain a 90 per cent rating of community and commercial confidence in tourism as a major contributor to quality of life in South Australia.</td>
<td>Achieve mandated national accreditation for the tourism industry by 2014.</td>
</tr>
<tr>
<td>This means: increasing visitor numbers, length of stay and visitor spending through developing and communicating a more appealing South Australian tourism experience.</td>
<td>This means: increasing the number of accredited operators dedicated to better managing and adapting their operations and assets to improve the environmental awareness and satisfaction of visitors.</td>
<td>This means: the majority of businesses and residents respect and value tourism as a positive builder of pride, prosperity and work/life balance in South Australia’s metropolitan and regional areas.</td>
<td>This means: the majority of tourism operators are committed to exceeding the expectations of visitors with great customer service and the highest standards of business practice.</td>
</tr>
</tbody>
</table>
3. FOCUS AND STRATEGY

This plan has a very deliberate focus on just four key focus areas and thirteen strategies within these areas. Strict selection criteria were used to elevate those ideas from an extensive list developed throughout the consultation process. Many of the ideas raised throughout the consultation converged into a few common themes. The following criteria were applied to ensure a measured approach to the selection of ideas and their adoption in the strategic planning process.

Table 2: Criteria for Prioritisation

<table>
<thead>
<tr>
<th>SELECTION CRITERIA</th>
<th>DESCRIPTION</th>
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<tbody>
<tr>
<td>Strategic</td>
<td>The idea must sit within the context of an existing plan, strategy or evidenced based research.</td>
</tr>
<tr>
<td>Brand</td>
<td>The idea must be underpinned by South Australia’s brand proposition and values.</td>
</tr>
<tr>
<td>Appeal</td>
<td>The idea must relate or appeal to consumers in the state’s target audience of ‘Experience Seekers’.</td>
</tr>
<tr>
<td>Collaborative</td>
<td>The idea’s implementation and commitment does not rely solely on the South Australian Tourism Commission.</td>
</tr>
<tr>
<td>Funding</td>
<td>Funding and resources must exist or have the potential to be acquired to implement the idea.</td>
</tr>
<tr>
<td>Timeframe</td>
<td>The idea must be capable of being achieved within six years.</td>
</tr>
<tr>
<td>Sustainability</td>
<td>The idea must be sustained financially, with no adverse environmental, social or political implications.</td>
</tr>
</tbody>
</table>
KEY FOCUS AREAS AND THIRTEEN STRATEGIES

COMMUNICATE
1. Better communicate the best of what the target audience wants to buy.
2. Leverage partnerships that help us to reach the target audience with the most compelling message and offer possible.

DEVELOP
3. Create new and refreshed tourism developments in South Australia.
4. Develop Adelaide’s tourism appeal by upgrading its special places and spaces.
5. Ensure external planning and policy impediments to sustainable tourism development are removed and that strategic investments are case-managed through the development process.

LEVERAGE
6. Grow new and existing festivals and events to act as a hook to visit South Australia and grow its image.
7. Encourage further investment in South Australia’s tourism assets and experiences (e.g., food and wine, nature).
8. Market Adelaide as an ideal destination for business events.
9. Build Adelaide’s reputation as a global study destination to encourage greater visitation and participation in South Australia’s tourism.
10. Make capturing the hearts and minds of visitors via authentic and powerful storytelling a significant point of difference in building South Australia’s visitor experiences.

ACTIVATE
11. Make Adelaide and South Australia a destination that can be easily and affordably reached.
12. Ensure consumer demand finds the points of sale that are best able to convert that demand into a holiday booking.
13. Build a single, strong body that takes responsibility for industry development, leading operators to a sustainable tourism future.

Marketing is only half the story – if we are to increase visitation to South Australia, we need to continue to invest in its tourism assets. This plan outlines some key goals for new tourism development throughout the state that will position South Australia as a must-see destination.

Richard Davis OAM
Yorke Peninsula Tourism Marketing

With its world-class facilities, Adelaide is one of Australia’s most popular destinations for business events. This plan will ensure the continued growth of this sector through a collaborative approach, and the Adelaide Convention Centre is looking forward to working with its partners to increase the number of high-yielding international conventions to SA.

Jane Jeffreys
Adelaide Convention Centre
4. PLAN OF ACTION OVER THE NEXT SIX YEARS

COMMUNICATE

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>RATIONALE</th>
<th>MEASURE</th>
<th>ACTIONS</th>
<th>PARTNERS</th>
<th>FUNDING/RESOURCES</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Better communicate the best of what the target audience will buy.</td>
<td>South Australia (SA) has one of the lowest consideration ratings of any state in Australia. To combat this we must communicate with impact the very best of what consumers are willing to buy. This will stimulate increased consumer demand for South Australia’s (SA’s) best holidays and experiences, and in turn fulfill a significant part of the $6.3 billion tourism target. This is the role of effective communications – to build consideration and conversion to visitation. This will be done through the work of the SATC and in cooperative activities with industry, national and international trade and media partners.</td>
<td>• Grow target audience consideration of SA to 25 per cent by 2014, from 13 per cent in 2007. • Increase our specific target market domestic visitors from 484,000 in 2007 to 750,000 in 2014. • Increase international visitor expenditure from $334 million in 2007 to $750 million in 2014. • Target an audience of 90 million through advertising and PR reach.</td>
<td>• Strive for the consistent, uniform promotion of a single message in all marketing across the state. Marketing should reinforce our core attributes through “promoting the best of SA” based on sound research. • Give operators more opportunities to work together and invest funds in cooperative advertising of packages to make an impression (i.e. impact rather than frequency). • Market SA holidays with a focus on Adelaide as a gateway to regional South Australia. As an industry, work cooperatively to reconsider the current approach to marketing regions and encourage more inter-regional activity based on experiences, not boundaries.</td>
<td>• SATC • Tourism operators • SA Government departments • Media</td>
</tr>
</tbody>
</table>

COMMUNICATE

<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>RATIONALE</th>
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<th>PARTNERS</th>
<th>FUNDING/RESOURCES</th>
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<tr>
<td>2</td>
<td>Leverage partnerships that help us to reach the target audience with the most compelling message and offer possible.</td>
<td>To better utilise SATC marketing resources, we need to enlist the help of media partners and trade partners to combine our resources to present the strongest share of voice to the market place.</td>
<td>• 55 per cent Advertising recognition amongst domestic audience by 2014. • $2 million p.a. in cooperative dollar leverage with partners by 2014. • 40 per cent media value add on top of nett media budget by 2014.</td>
<td>• Identify Distribution Champions – those that will sell an “unfair share” of South Australia – and create cooperative marketing opportunities with them. • Run fewer but larger marketing campaigns in order to leverage spend with media partners to deliver extra value.</td>
<td>• SATC • Tourism operators • Wholesalers • Travel agents • Online Travel Agents • Media partners</td>
</tr>
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### Develop

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| 3        | Create new and refreshed tourism developments in South Australia. | A destination is only as good as the experience offered relative to its competition. Increasing South Australia’s appeal will be crucial if we are to reach our tourism target. New investment with an ‘emphasis on design and sustainability’ is needed in infrastructure, public attractions and accommodation. We must identify and collaborate with investors to develop new experiences and refresh existing properties, giving South Australia something fresh and new to communicate, and our target market increased reason to visit. | • Increase new investment by $200 million by 2014.  
• 10 major upgrades of existing properties by 2014.  
• Increase strategic government funding of infrastructure projects in next six years. | SATC  
DEH  
Investors  
DTED  
PIRSA | Yes, minimal.  
Private sector will be the major player here. |
|          |           |         | • Identify opportunities to entice land owners, investors and developers to build world-class visitor experiences. | SATC  
DEH  
Investors  
DTED  
PIRSA | |
|          |           |         | • Encourage critical mass in regional areas by facilitating the development of new 4-5 star convention and accommodation facilities in key locations. | SATC  
Investors  
Regional Development Boards  
PIRSA | Yes, minimal.  
Private sector will be the major player here. |
|          |           |         | • Upgrade vital tourism infrastructure at key locations that appeal to the target audience. Take into account Regional Tourism Plans. | SATC  
DEH  
DTEI  
PIRSA  
Councils | Partially but greater investment needed from private operators. |
| 4        | Develop Adelaide’s tourism appeal by upgrading its special places and spaces. | As with many destinations globally, the capital city is top of mind when consumers are considering their holiday options. Research shows that we face a significant challenge to shift long standing perceptions of Adelaide. In fact, many Australians still do not perceive it as a compelling destination. Priority must be given to developing and promoting experiences that bring the city to life. Adelaide is a sophisticated, elegant and enlightened city, so an array of physical cultural attractions with engaging interpretation and experience is needed, rather than an icon-driven solution. Adelaide serves as a gateway to a plethora of regional experiences, most which are more accessible in relation to travel time than similar experience opportunities in the larger Eastern state capitals. | • Increase number of consumers who prefer Adelaide from 935,000 in 2007 to 1.5 million by 2020. (Source: Roy Morgan Holiday Tracking Survey).  
• Increase Adelaide’s share of capital city tourism from 9 per cent in 2007 to 14 per cent by 2020.  
• Increase room night demand in the City by 5 per cent p.a. | Adelaide City Council  
SA Government  
Private Sector | Project by project basis. |
|          |           |         | • Prepare and implement a master growth plan based on excellent high quality urban design (e.g. complete North Terrace upgrade from Wine Centre to West End, develop Victoria Square, reinvigorate the Riverfront Precinct). | Adelaide City Council  
SA Government  
Private Sector | |
|          |           |         | • Adopt recommendations in the Adelaide City Council’s Tourism Action Plan, to be released in 2009, particularly in regard to public space use, cycling, walking, cultural interpretation, public art and signage. | SATC  
Adelaide City Council  
Private Sector | Partially. |
|          |           |         | • Invest in a program of regular refurbishment of major hotels, motels and caravan parks in the Adelaide area. | Private hoteliers and property owners | Private investment required. |
### LEVERAGE

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| 6 | Grow new and existing festivals and events to act as a hook to visit South Australia and grow its image. | Events are critical to the pride and confidence of a state. In the past 13 years, South Australia has developed an impressive events calendar that is building local confidence; profiling the state as a tourism destination; strengthening SA brand image; giving visitors a reason to visit and contributing to accommodation occupancy. South Australia rates third among all states for its association with events, and we need to build on this. We must take stock of our portfolio of leisure events (sport, arts and culture) to strategically grow the calendar. In doing so, we will further enhance our events appeal and increase the sector’s economic and social importance. | • Increase the economic value of leisure events to $340 million by 2014.  
• Target domestic and international media exposure of $150 million for managed events by 2014.  
• Double SAs’ rating to achieve 55 per cent association with festivals and events by 2014 (Brand Health Monitor, multiple response).  
• Create at least one new ‘iconic’ event for South Australia that fills a strategic void. | • Initiate an Events Strategic Plan, underpinning future investment, management, development, leveraging bidding and programming (with a view to a better spread throughout the year) of major festivals and events up to 2014.  
• Identify and develop 10 to 12 key regional festivals and events that have the potential to attract large crowds, including out-of-state visitors. Ensure SATC funding is more strategic and supports the best regional festivals and events that underpin the brand.  
• Improve international and domestic packaging of event experiences and pre and post touring opportunities to encourage visitors to stay longer. | SATC, ArtsSA, Sport and Rec, Adelaide Festival Centre Trust, Event Companies, Adelaide Convention Centre, Adelaide Showgrounds, Major venues | Yes. |

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| 5 | Ensure external planning and policy impediments to sustainable tourism development are removed, and that strategic investments are case managed through the development process. | A positive tourism planning and policy environment is a crucial enabling factor to attract appropriate investment in SA. Informed analysis plays a vital role in informing South Australia’s destination development needs and, importantly, the requirements of the target audience. Investment should be guided by South Australia’s Design Guidelines for Sustainable Tourism Development, to protect the state’s heritage, culture and natural beauty. | • 80 per cent of SA Outer Metro and Country Councils with positive policy provisions for tourism in their development plans by 2014.  
• Government strategies and policies to incorporate tourism objectives, to encourage a positive tourism policy environment (benchmark to be established).  
• A whole-of-government cooperative approach to case planning (benchmark to be established). | • Undertake research to prepare a Destination Development Plan that reinforces South Australia’s core attributes and results in product and accommodation that appeals to our core target markets.  
• Link tourism policies with other state policies to generate benefits between sectors and achieve sustainable strategic outcomes for the state.  
• Maximise opportunities for successful, sustainable tourism development by streamlining state and local government planning approvals.  
• Support innovative designs by adopting a whole-of-government case planning approach with incentives. | SATC, RTDs, Department of Planning and Local Government, State Government Agencies | Yes. |

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<td>SATC, ArtsSA, Sport and Rec, State Government agencies, RTOs, Councils, RDBs, PI SRA, Private investors, Treasury</td>
<td>Yes. (Incentives not funded).</td>
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<td>7</td>
<td>Encourage investment in South Australia’s tourism assets and experiences (e.g. food and wine, nature).</td>
<td>SAI’s strengths vary across regions and include food and wine, nature-based activities, living heritage, arts and enjoying the local way of life, among many.</td>
<td>• Increase South Australia’s association with distinctive dining and fresh regional produce from 24 per cent in 2007 to 40 per cent in 2014 (multiple response) Source: SATC Brand Health Monitor.</td>
<td>• Implement the recommendations of the SA Food and Wine Strategy 2009-2014 to guide the state’s food and wine tourism agenda in cooperation with key partners. Rebundle, package and distribute food and wine experiences, associating them as SA experiences by linking a diverse range of complementary authentic experiences that provide the rewards visitors are seeking (e.g. great beaches, nature and ecotourism, living heritage, enjoying the locals’ way of life, healthy activities e.g. cycling etc), and generate media coverage of these new combined itineraries.</td>
<td>• Wine industry</td>
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<td>South Australia’s dominance as a food and wine destination is continuously challenged in our major domestic markets. It’s time to demonstrate that South Australia is not just the heart of Australian wine, but has the most credible and authentic wineries, wine regions and culinary distinctions in the world. The appeal of any wine region is still largely based on its reputation for quality wine, but visitor expectations are clearly changing. South Australia must be at the cutting edge of global cellar and producer door experiences, and lead the way in distinctive regional produce and dining experiences.</td>
<td>• Increase South Australia’s share of visitors to Australian wineries from 20 per cent in 2007 to 25 per cent in 2014.</td>
<td>• SATC</td>
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<td>We must continue to meet expectations of travellers who gravitate to SA for food and wine, and provide reference points to our other unique strengths by which they align their exceptional experience to SA.</td>
<td>• Increase South Australia’s association with nature and natural environment from 17 per cent in 2007 to 35 per cent in 2014 (multiple response) Source: SATC Brand Health Monitor.</td>
<td>• SATC Share of visitors to Australian wineries from 20 per cent in 2007 to 25 per cent in 2014.</td>
<td>• SATC Brand Health Monitor.</td>
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<td>We must better link and package our tourism experiences, and in particular leisure product, with complementary and uniquely South Australian experiences.</td>
<td>• Increase South Australia’s association with arts and entertainment from 18 per cent in 2007 to 35 per cent in 2014 (multiple response) Source: SATC Brand Health Monitor.</td>
<td>• SATC</td>
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<td>Accommodation matching the food, wine and nature based experience is also essential.</td>
<td>• Increase tourism industry and stakeholder collaboration and efforts to bundle, package and value add product experiences which collectively build our visitors’ sense of amazing “SA Experiences”.</td>
<td>• SATC</td>
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<td></td>
<td>• SATC • Tourism Operators • Travel Agents</td>
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<td></td>
<td></td>
<td></td>
<td>• Wine and food operators • Tourism Product Operators &amp; Stakeholders</td>
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<td></td>
<td>• RTO’s</td>
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<td>• SATC • DEH</td>
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<td></td>
<td>• DEH</td>
<td></td>
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<td></td>
<td>Partially; but greater private investment required.</td>
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<td>8</td>
<td>Market Adelaide as an engaging destination for business events.</td>
<td>Cities are judged on factors such as costs, airport accessibility, hotel quality, climate, transport and conference facilities. The business tourism market has become more sophisticated and competitive in recent years. Many Australian and overseas destinations have invested heavily in meetings, exhibition and convention infrastructure. Failure to address capacity issues now has the potential to stifle growth and the ongoing economic contribution of this high-yield tourism sector. Although the Convention and Tourism Authority (ACTA) makes a substantial contribution to destination marketing, South Australia would benefit from a more cooperative approach among key players.</td>
<td>• Increase the number of international visitors attending Adelaide business events to 12,000 by 2014 (from a 2007 baseline of 8,000). • Increase the average stay of international visitors attending Adelaide business events to 6.5 nights by 2014 (from a 2007 baseline of 5). • Increase the number of interstate visitors attending Adelaide business events to 70,000 by 2014 (from a 2007 baseline of 50,000). • Adelaide to improve its ranking in the International Congress and Convention Association’s (ICCA) annual global city rankings for the number of international association meetings held.</td>
<td>• Initiate more cooperative marketing between the SATC, ACTA, the Adelaide Convention Centre, Adelaide Showgrounds, hotels, DTED and other providers involved in business tourism and marketing South Australia as a location for tourism, business and migration. Pool resources, exchange information and forge greater partnerships with major business tourism players to maximize marketing impact, particularly in international markets.</td>
<td>SATC, ACTA, Adelaide Convention Centre, Hotels, Adelaide Showgrounds, DTED</td>
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<td>9</td>
<td>Build Adelaide’s reputation as a global study destination to encourage greater visitation and participation in South Australian tourism.</td>
<td>In 2008, Education is South Australia’s fourth largest export, contributing $873 million to the state’s economy. It also accounts for a significant slice of the state’s $4.2 billion tourism industry. Education is the only export industry with the capacity to position Australia as a clever country, fuel trade, build tourism, fill skills shortages and address population growth. Importantly, it is seen as a growing niche market opportunity for tourism, principally through the development of study tour programs, friends and relatives tour packages, airline connections from source markets and employment for international students. Active pursuit of opportunities in this area will require collaborative initiatives by SATC, DECS, Education Adelaide, inbound tour operators, education institutions and a core group of tourism suppliers.</td>
<td>• Increase the economic value of education tourism to $2 billion by 2014. • Increase the number of ELICOS (intensive English language) providers in Adelaide and expand provision of existing institutions. • Increase visitation, length of stay and expenditure of existing students.</td>
<td>• Grow visitor numbers in the ELICOS sector (specifically, in short-term intensive English language study courses). Encourage entrepreneurial edu-tourism specialists to establish a presence in SA and provide easily accessible information for ELICOS students about touring options, including tourism linked study tour packages.</td>
<td>ELICOS providers, Education Adelaide, Education Institutions, SATC</td>
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<td>10</td>
<td>Reinvest in the “Linger Longer” concept by creating packages and incentives for family and friends to visit students, stay for a holiday and explore the state.</td>
<td>• Reinvest in the “Linger Longer” concept by creating packages and incentives for family and friends to visit students, stay for a holiday and explore the state.</td>
<td>• Market South Australia as a tourism destination to international students via online social networks. Maximise marketing opportunities via user generated sites to talk directly to student based “communities of interest.” Provide information about fun, engaging experiences in SA.</td>
<td>SATC, Education Adelaide, SATC, Special agents</td>
<td>Requires reallocation of existing funds into more cooperative ventures.</td>
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<td>11</td>
<td>Requires private investment with some SATC support.</td>
<td>SATC, Education Adelaide, SATC</td>
<td>Requires private investment with some SATC support.</td>
<td>SATC, Education Adelaide, SATC</td>
<td>Requires private investment with some SATC support.</td>
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<td>10</td>
<td>Make capturing the hearts and minds of visitors via authentic and powerful storytelling a significant point of difference in building South Australia’s visitor experiences.</td>
<td>Interpretation is about helping people to love what you love – through awareness, understanding, appreciation and emotionalising the experience. South Australia’s target audience travels to experience difference – these people want to immerse themselves in people, place and culture. Often they will recall specific stories when recounting their holiday experiences. Stories, well told, can be a point of difference in building advocacy for a destination. They improve the visitor experience, increase yield, grow repeat visitation and foster onward recommendation. South Australia boasts a strong ancient and contemporary Indigenous culture along with political and social heritage. These are supported by stunning natural and cultural landscapes in which they occur and products by which we experience them, and we should capitalise on these.</td>
<td>• Increase the number of operators who can demonstrate improvement in yield by participating in interpretive training (benchmark to be established).</td>
<td>Industry body</td>
<td>No.</td>
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<td>• Increase in level of visitor satisfaction on key tourism experiences (benchmark to be established).</td>
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<td>Educators</td>
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<td></td>
<td>• Number of new infrastructure projects incorporating tourism content and appropriate and emotionally engaging interpretation (benchmark to be established).</td>
<td></td>
<td>Tourism operators</td>
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<td>• Increase the number of operators who provide interpretation of South Australia’s Indigenous Culture (benchmark to be established).</td>
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<td>Business advisors</td>
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<td>• Increase South Australia’s association with Aboriginal Culture from 13 per cent in 2007 to 20 per cent in 2014 (multiple response) Source: SATC Brand Health Monitor.</td>
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<td>SA Government Agencies</td>
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<td>• Develop interpretation plans for sites, locations and regions that dovetail with visitor interests and tourism marketing strategies. Encourage regional dispersal through connecting these stories.</td>
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<td>Tourism operators</td>
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<td>• Improve visitor experience on drive routes through key towns and tourism regions via excellent interpretation and maximizing use of new media and GPS technology.</td>
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<td>Business advisors</td>
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<td>• Offer appropriate and site specific training for operators and stakeholders keen to value-add via excellent interpretation. Run professional development programs, such as those offered by Flinders University; link interpretation training to brand coaching; and draw on the theatre sector. Create clusters of skilled experience-creating operators as champions who advocate and demonstrate improved yield through interpretation.</td>
<td></td>
<td>Key players</td>
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<td>Related industries e.g. Mining industry</td>
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<td></td>
<td>• Develop interpretation plans for sites, locations and regions that dovetail with visitor interests and tourism marketing strategies. Encourage regional dispersal through connecting these stories.</td>
<td></td>
<td>SATC</td>
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• Industry body
• Educators
• Tourism operators

Partially but greater investment required.
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<td>11</td>
<td>Make Adelaide and South Australia a destination that can be easily and affordably reached.</td>
<td>To a great extent, South Australia’s success as an international tourism destination lies in the ability of consumers to begin or end their Australian journey in Adelaide. Airline access is therefore crucial to South Australia’s prosperity, and the tourism industry must strive to remain competitive by supporting existing airlines and newly introduced services. This will become increasingly difficult if oil prices and economic operating costs become prohibitive. While South Australia benefits from its proximity to Sydney and Melbourne, we must continue to grow capacity to remain price competitive. Importantly, Adelaide is currently under-serviced by direct international flights when compared to Australian cities of similar size.</td>
<td>• Increase weekly domestic passenger seat capacity from 70,000 in 2007 to 100,000 in 2014. • Increase weekly direct international inbound seat capacity from 5,570 in 2007 to 10,000 in 2014.</td>
<td>• Develop a long-term, orchestrated approach to international airline attraction through a state aviation working group. Plan for targeted in-market visits by key stakeholders and Adelaide Airport Limited, to build a united attraction campaign.</td>
<td>• SATC • DTED • DTEI • Adelaide Airport Limited • Carriers</td>
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<td>Revenue from existing services can only fund incremental development to support normal growth.</td>
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<td>Indicative willingness to fund from SATC, operators and partners.</td>
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<td>Partially.</td>
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- Work closely with domestic airlines to ensure Adelaide and key regional airports are serviced appropriately with direct interstate connections. (e.g. Pt Lincoln, Whyalla, Kingscote, Mount Gambier, Coober Pedy and Ceduna).
- Act as “charter instigators” by establishing consortia to operate charter flights for high-yield international visitors. Ensure there is marketing support from the SATC to sell the most appealing holiday experiences.
### ACTIVATE

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<td>12</td>
<td>Ensure consumer demand finds the points of sale that are best able to convert that demand into a holiday booking.</td>
<td>South Australia is a complex tourism product to buy, and the consumer prefers a variety of ways to purchase their travel products. The SATC needs to ensure that there are businesses across the spectrum of points of sale that know how to sell SA well, and then make sure that marketing messages refer consumers to those channels. Failure in this link of the distribution chain means SA is easily substituted for a competitive destination. A key SA tourism challenge lies in creating a more interesting experience for consumers to buy and developing a well-trained and highly motivated distribution system through which to buy it. Getting visitors to come to South Australia through a powerful brand message about these experiences is one thing. Ensuring they are well informed when they get here – in order to optimise their experience – is another. We must ensure SA is easy to research and book even at this stage of the visit. Visitor Information Centres (VICs) have a key role in extending visitors’ length of stay, spend and the number of experiences they participate in. It is extremely important that these centres do not operate in ‘silos’, but guide visitors further into surrounding regions and SA experiences. This works to create a bigger pie, increase visitor experience and provide a sense of value. VICs should be the ‘in-field’ access points for online communication.</td>
<td>• SATC marketing activities to generate 20 per cent more consumer enquiries annually.</td>
<td>• Initiate cooperative marketing promotions with key distribution partners.</td>
<td>• SATC</td>
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• Grow SA’s market share of tourism expenditure in Australia by 10 per cent annually. | • Develop the SA Visitor & Travel Centre into a fully functioning wholesale operation. | | • Tourism operators | |

• Increase in VIC patronage (benchmark to be determined). | • Train wholesale and retail agents who are committed to selling an ‘unfair share’ of South Australia. | | • Wholesalers | |

• Increase in on-line traffic (benchmark to be established on initiation of centres). | • Provide consumers with a choice of conversion paths to buy South Australia. | | • Travel agents | |

• Implement conversion targets for strategic VIC staff (benchmark to be determined). | | | • Online Travel Agents | |

• Create a strategic network of exemplar Visitor Information Centres which provide highly collaborative links to broader experiences. | | | • SATC | |

• Review VICs to determine the most strategically efficient network of centres. | | | • RTOs | |

• Create one proto-type VIC that is set up for networking, referral to other attractions and acting as the signpost to the local and SA stories. | | | • Councils | |

• Realign existing visitor information centres to create networks – all should be focused on adding to the visitor experience and up-selling South Australia. | | | • Operators | |
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<td>13</td>
<td>Build a single, strong body that takes responsibility for industry development, leading operators to a sustainable tourism future.</td>
<td>South Australian tourism is almost entirely (95 per cent) comprised of small to medium businesses. These businesses are diverse and dispersed across the state. This hinders the industry’s ability to represent its interests in a unified, persuasive way. As a result, the industry is heavily reliant on the SATC to deal with almost all matters relating to tourism. This breeds dependency, impedes industry growth and places an “all things to all people” pressure on the SATC. Now more than ever, there is a call for the SATC to focus solely on development and marketing. South Australia needs a strong, independent body that can deliver training and accreditation, business advice, address operator challenges and improve quality service standards. This organisation must have a critical mass of professional resources and, ideally, the ability to unite disparate industry groups. The opportunity exists to establish a positive and productive partnership with the SATC.</td>
<td>• An independent industry body with high calibre board, professional resources and sufficient funding to be established by March 2009. • 7 per cent annual growth in accreditation, with majority of tourism businesses accredited by 2014. • Establish mechanism to monitor and track industry workforce development needs by the end of 2009. • Increase tourism’s reputation as an economic generator among corporate and community sectors (benchmark to be established).</td>
<td>• Build a strong industry body with responsibility for the management of all industry initiatives, to unify and grow the maturity of the industry and create quality, consistency, professionalism, innovation and influence.</td>
<td>SATC • SATA • SATIC</td>
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<td>• Review key issues from the Minister’s Round Table e.g. tourism workforce, sustainability. Facilitate implementation of critical recommendations (e.g. education program on climate change for operators).</td>
<td>Industry Body</td>
<td>Partially but investment required on a project basis.</td>
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<td>• Advocate a single national accreditation program that offers easy and affordable compliance and can be used as a consumer marketing tool. Ensure it incorporates opportunities for credible accreditation in the areas of environmental sustainability (climate change risk adaption and mitigation practices), visitor management in national parks and tour guiding.</td>
<td>Industry Body • SA Government • SATC • Tourism operators</td>
<td>Partially.</td>
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5. IMPLEMENTATION AND MONITORING

The South Australian Tourism Commission and the tourism industry understand that turning great ideas into reality will require significantly more effort than the creation of an action list. As was recognised during consultation, the SATC in conjunction with the industry is committed to this plan’s implementation and monitoring. This monitoring and subsequent evaluation will form a platform for the review of our collective achievements and guide our direction.

Achieving $6.3 billion in tourism expenditure by 2014 will require focus, commitment and collaboration. We must maintain a thorough knowledge of tourism trends and adapt strategies around future obstacles and opportunities, and align all stakeholder plans to common purpose. We will also record and celebrate the industry’s achievements along the way.

Progress will be communicated widely through improved stakeholder communication networks supported with initiatives such as the development of the industry body. The Minister’s Tourism Round Table will include a progress report and updates will be published annually.

Roger Cook AM
South Australian Motor Sport Board

South Australia has, for a number of years, recognised the value of events, both in economic and marketing terms. Successful major events add to the recognition and status of the state. They also bring life and colour to our streets and towns – the Tour Down Under to the city and nearby towns, and the Clipsal 500 to the metropolitan area, by generating 70,000 room nights in hotels, as well as winning all major Australian awards.

This Plan recognises the benefits of such events and will help to be a catalyst in attracting further high profile and valuable events to the state.
6. OUR STARTING POSITION

OUR PERFORMANCE

Over time, tourism activity is characterised by short-term fluctuations within longer-term growth, so it is worth examining South Australia’s performance in terms of trend. Overall, there has been limited growth in intrastate, interstate and international demand and a greater focus on access, development and marketing is required to change these patterns.

**International:** From 1999 to 2007, South Australia’s average annual growth rate in visitor numbers was 1.6 per cent, below the national growth rate of 2.9 per cent. The state’s average annual growth in nights was 5.9 per cent, slightly above national annual average growth of 5.7 per cent.

**Figure 3: International Performance in South Australia 1999-2007**

![Graph showing international performance in South Australia 1999-2007](image)

**Interstate:** From 1999 to 2007, South Australia’s average annual growth rate for interstate visitors was 1.6 per cent (nationally it was 1.9 per cent). South Australia’s average annual growth in interstate nights was 1 per cent, slightly higher than the national average annual growth rate of 0.8 per cent.

**Figure 4: Interstate Performance in South Australia 1999-2007**

![Graph showing interstate performance in South Australia 1999-2007](image)

Intrastate: From 1999 to 2007, the average annual growth rate for intrastate visitors in SA was -0.9 percent (nationally it was similar, at -0.7 per cent). Intrastate nights were down 1.1 per cent per annum both nationally and in SA.

**Figure 5: Intrastate Performance in South Australia 1999-2007**

![Graph showing intrastate performance in South Australia 1999-2007](image)

Factors contributing to international trends during this period included the movement of the Australian Dollar; the increasing cost of oil translating to increased fuel surcharges; concern about carbon emissions generated through long-haul travel; ongoing international security issues; and intermittent concerns about potential pandemics. Combined, these factors reduced Australia’s affordability and attractiveness in the face of increasing competition from cheaper, more accessible destinations among consumers in Australia’s traditional long-haul markets.

Downward trends in domestic tourism during this period, both nationally and in South Australia, have been caused by factors including higher levels of personal and household debt; changing household consumption patterns; greater levels of outbound travel; a changing labour market; more affordable longer distance travel; increasing domestic holiday costs and fluctuations in the price of petrol. These factors affect affordability and competitiveness.

Through the timeframe of this strategic plan, changes in these variables may place greater pressures on domestic travel or alternatively provide opportunities. Tracking the impacts of economic performance on differing components of tourism is critical to maintaining a proactive approach to building tourism in SA.
In tourism marketing, these people are known as Experience Seekers. However, in specifically targeting this segment (or any segment for that matter) South Australia has a considerable challenge. The state records the lowest appeal among Australian Experience Seekers, at just 13 per cent. And we currently convert just 3 per cent of Australia’s high-yield holidays.

**International**

South Australia must also continue to target discerning and high yielding international Experience Seekers from priority markets including Europe, UK, the Americas, Asia, New Zealand and Japan. Commitment to developing the India and China markets remains a critical investment focus for new market growth.

Increasing direct access to South Australia will result in growth of the international market. Development and distribution of the South Australian experience is also vital. As international interest grows in authentic destinations, South Australia is well positioned to offer more appealing specialty experiences based around our inherent strengths of events, culture, food and wine, nature and wildlife.

Building awareness and converting that interest to bookings will continue to involve cooperative work with the industry, national and international trade and media partners.

**EXPERIENCE SEEKERS**

So who are these Experience Seekers and what do they really want? Briefly, they are defined as those people who:

- Spend more than $200 per night, or spent $1000-2000 in total on their last holiday;
- Come from a range of socio-economic backgrounds; and
- Take an average of four holiday trips a year.

Seventy-five per cent travel without children; are between 30 to 60 years old; most are university-educated; and most come from capital cities (predominantly Melbourne and Sydney).

**Experience Seekers** prefer to find out about holidays through TV travel shows, newspaper and magazine editorial and television advertising. They find out more about holidays through credible websites, including those of state tourism bodies. They book their holidays through a variety of sources including online travel services, directly over the internet or through a travel agent.

When it comes to holidays, Experience Seekers seek quality but not pretentiousness. They have done the “touristy” things and want active, immersive holiday experiences. South Australia is one of the many holiday experiences on their “to-do” list, but not the only one. In the first instance the Plan targets those who are already considering a South Australian holiday within the next two years.

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3 For more information on Experience Seekers please visit the Corporate Website of the South Australian Tourism Commission and Tourism Australia.

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**OUR AUDIENCE**

Figure 6: Origin of Visitors to South Australia

- International 7%
- Intrastate 60%
- Interstate 34%

Figure 7: Origin of Visitor Nights in South Australia

- International 26%
- Intrastate 38%
- Interstate 36%

Figure 8: Visitor Expenditure in South Australia ($ millions)

- Day trip visitors 21%
- Domestic overnight visitors 67%
- International overnight visitors 12%

**Domestic**

Domestic tourism accounts for 94 per cent of South Australia’s visitors, 74 per cent of visitor nights (2006) and 88 per cent of visitor spend. South Australia’s tourism target is expressed in terms of spend. Within the domestic market, 14 per cent of the Australian population (2.4 million people) spent more than $2000 on their last trip.

Significantly, this 14 per cent accounted for more than 78 per cent of the total expenditure by Australians on interstate and overseas travel. These higher yield travellers are therefore the number one consumer market in terms of the expenditure target.

South Australia must target this high-yield market segment, and more specifically those within it who show a propensity to visit SA. Research tells us that these consumers are mainly in Melbourne and Sydney (SA’s two largest markets) and include South Australia in their consideration set of potential holiday destinations.
BRAND STRATEGY

Positioning South Australia in the minds of these higher yielding consumers is essential. The brand strategy is not merely a discipline for the promotional message – it is the platform from which all investment, planning and even regulatory policy negotiations are based. It ensures consistency and a united approach to all activities.

Figure 9: South Australia’s Brand Strategy

South Australia's brand strategy is based on the consumer perspective. It identifies the state’s core attributes, the rational benefits delivered to visitors and the emotive responses derived from a South Australian holiday experience.

The core attributes of South Australia upon which the brand is being built are: its enterprising tradition of creativity and innovation; being the home of exceptional wine and produce; its beautiful city and a festive spirit; and experiences of unspoilt nature at close proximity. These attributes can deliver both rational and emotive benefits to the visitor as shown in Figure 9.

Based on these core attributes and benefits, South Australia seeks to establish a brand position in the national and global marketplace as “a vibrant and welcoming place that celebrates the good things in life.” It is important to note that this is not a tagline or advertising campaign, but a core promise that is reflected in our communication messages.

7. ACKNOWLEDGEMENTS

CONSULTATION PROCESS

The South Australian Tourism Commission acted as facilitator for the preparation of the South Australian Tourism Plan 2009-2014. Before getting down to the business of creating a new plan, it was vital to review and audit its predecessor, namely the South Australian Tourism Plan 2003-2008. More than 200 industry respondents completed our online survey of the plan, while a comprehensive audit revealed the following achievement ratings for strategies: achieved good outcomes 86 (31 per cent); partially achieved 84 (29 per cent); ongoing action 69 (25 per cent); action with no result 26 (9 per cent); and no action 17 (6 per cent).

Significant achievements in the past five years have included:

- The re-branding of SA
- The development of new events
- The opening of Adelaide’s new airport and increased international seat capacity
- Regional tourism funding
- Improved partnerships
- Increased luxury product offering increased delivery of existing accreditation programs and the adoption of new programs addressing issues such as Climate Change
- The release of Sustainable Tourism Package and Design Guidelines for Sustainable Tourism Development
- Better use of new technology and online innovation within the SATC’s promotional efforts.

In December 2007, delegates on the Minister's Tourism Round Table agreed that the South Australian Tourism Plan 2009-2014 would meet the following criteria:

- An absolute focus on the target of $6.3 billion in tourism expenditure
- Greater industry accountability
- Clearer priorities and fewer strategies
- A clear definition of the plan’s purpose and where it sits with other plans
- Clearer KPIs upfront
- Targeted and more efficient consultation
- Wider, external perspectives
- An upfront funding commitment for the implementation of key initiatives.
Preparation of the South Australian Tourism Plan 2009-2014 then began, with a comprehensive consultation process aimed at seeking tourism operator, stakeholder and government input. This process involved:

- A detailed environmental scan of future economic, social, political, environmental and technological trends and their impact on tourism;
- Eight workshops, facilitated by SATC Chief Executive Andrew McEvoy, with expert participants from around Australia. Topics included aviation, development, distribution, communication and industry challenges.
- A review of tourism plans prepared by other state tourism organisations;
- Three sessions with the Minister’s Tourism Round Table on key aspects of the plan, including major issues, KPIs and a vision statement;
- The receipt of almost 50 written submissions, which were later condensed into a list of prioritised actions;
- A review period of the draft plan for which 30 submissions were received.

CONTRIBUTORS

Sincere gratitude and thanks to those individuals who generously offered their time and inspiration throughout the development of this plan. We particularly appreciate the time and effort taken by respondents to our online survey, the organisations and agencies which put forward written submissions, and those that participated in the workshops.