

SOUTH AUSTRALIAN

# ARTS & CULTURAL TOURISM

STRATEGY 2025



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## SOUTH AUSTRALIAN ARTS & CULTURAL TOURISM STRATEGY 2025

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### ACKNOWLEDGEMENT OF COUNTRY

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Aboriginal people have made and continue to make a unique and irreplaceable contribution to the state of South Australia.

The South Australian Government acknowledges and respects Aboriginal people as the state's first people and nations and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters.

The South Australian Government acknowledges that the spiritual, social, cultural, and economic practices of Aboriginal people come from their traditional lands and waters, and that Aboriginal people maintain cultural and heritage beliefs, languages and laws which are of ongoing importance today.





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## MESSAGE FROM THE PREMIER

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Arts and cultural tourism is an important part of the fabric of our state. From delivering large-scale Festivals and Events, to visits to artist workshops and studios, the arts draw domestic tourists across South Australia, providing opportunities to share local creativity and culture with visitors.

Arts and culture generate significant benefits for the state, aligning with the South Australian Visitor Economy Sector Plan 2030, driving visitation and expenditure. Pre COVID, the Arts and Cultural Tourism sector employed 7,500 people and generated \$1.4 billion in visitor expenditure. With the onset of the pandemic, expenditure in Arts and Cultural tourism has been impacted, falling to \$700 million by December 2020. This Strategy aims to grow this back to \$1.4 billion by 2025.

The Arts and Cultural Tourism sector is not only measured in economic terms, it has a greater impact on our society. Arts and culture express human experiences and delivers enormous cultural and social benefits across the whole of society. It celebrates and recognises South Australia's diversity and cultural identity including respecting and sharing South Australia's Aboriginal culture, heritage, and traditions.

To help grow Arts and Cultural Tourism, we need to play to our strengths. That means we need a clear and consistent vision, created and owned by both industry and the South Australian community. This document provides the basis of this vision. Through the consultation process we had more than 20 face to face consultation sessions with a range of Arts and Cultural organisations, an industry forum with more than 100 stakeholders and a survey covering 166 interested parties. The Strategy also incorporates key ideas from both the Arts and Culture Plan South Australia 2019 -2024 and the South Australian Visitor Economy Sector Plan 2030.

The South Australian Government is committed to growing the South Australian Arts and Cultural Tourism sector. This Strategy is part of the broader growth agenda seeking to drive rapid growth across key industry sectors. It communicates our vision for the Arts and Tourism sector and demonstrates our commitment to an industry that continues to make a significant contribution to the success of South Australia.



**HON STEVEN MARSHALL**

Premier of South Australia



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## MESSAGE FROM ARTS SOUTH AUSTRALIA & THE SOUTH AUSTRALIAN TOURISM COMMISSION

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South Australia is known for its vibrant arts and culture. Our Art Gallery is home to over 45,000 works, not to mention the array of events and festivals that celebrate art in all its forms throughout the year. Summer just wouldn't be the same without the Adelaide Festival, Fringe and WOMAdelaide and the winter months bring with it the Adelaide Cabaret Festival and the South Australian Living Artists Festival.

To ensure the vibrancy of our arts and culture, the South Australian Tourism Commission (SATC) and Arts South Australia developed the Arts and Cultural Tourism Strategy through a joint initiative. The aim of the strategy is to grow the sector in South Australia through increased expenditure on our amazing Arts and Cultural experiences.

Arts and cultural tourism plays an important role in the South Australian visitor experience and is vital to our state's Visitor Economy. Arts experiences have a growing role as a driver for tourism in South Australia, supporting local economies and building stronger regional communities.

With the onset of COVID-19 we've seen arts and cultural tourism visitor expenditure fall to \$700 million at December 2020. This strategy sets out the plan to return this visitor spend to its pre-COVID level of \$1.4 billion by 2025. Further to the loss of expenditure we've also seen the social impacts with reduced venue capacities, performance cancellations and social distancing requirements.

The Strategy outlines six strategic priorities, each interconnected and reliant on each other for a successful and thriving Arts and Cultural tourism sector. Industry consultation has also shown that marketing of Arts and Cultural experiences and greater collaboration with and between the tourism and Arts and Cultural sectors were the most important areas of focus.

The opportunities for South Australian Arts and Cultural Tourism are plentiful. We need to build on the sector's current strengths and authentic offerings including expanding the engagement with South Australia's Aboriginal Arts and Cultural tourism offerings. Additionally, it is critical that we consider new opportunities to engage emerging audiences, including the embrace of new technologies and to integrate with our state's other areas of strength, as outlined by the Premier's Growth State Plan. By working together, the tourism and Arts and Cultural sectors can continue to grow in a sustainable way, while boosting our state's Visitor Economy in the process.



**RODNEY HARREX**

Chief Executive  
South Australian Tourism Commission



**JENNIFER LAYTHER**

Director, Arts South Australia  
Department of the Premier & Cabinet



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## EXECUTIVE SUMMARY

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Arts and Cultural Tourism is an important part of the South Australian visitor experience and is vital to the South Australian Visitor Economy contributing \$1.4 billion of the overall \$8.1 billion Visitor Economy and supporting 7,500 jobs pre-COVID.

While the language used within the Arts and Cultural and Tourism sectors can differ, the intention of both industries is in alignment. That is, to deliver and share exceptional experiences that are inclusive, authentic and enrich people's lives.

The aim of this Strategy is to grow South Australia's Visitor Economy through increased visitor participation and spend on exceptional Arts and Cultural experiences. That includes international, interstate and intrastate visitors.

The value of the Arts and Cultural sector is not just measured in economic terms but also in terms of its greater contributions to society. Specifically social cohesion and wellbeing, place making, connectedness and a way to celebrate and acknowledge South Australia's diversity and cultural identity. This includes respecting and sharing South Australia's Aboriginal culture, heritage, and traditions.

Like tourism overall, the COVID-19 pandemic has seen Arts and Cultural tourism greatly impacted, with visitor expenditure dropping by half from \$1.4 billion to \$700 million by December 2020. The social impacts are also being felt from reduced venue capacities, performance cancellations and social distancing requirements.

International visitors are a significant market for this sector and will be again when international borders fully reopen. Australians however represent immediate growth opportunities from both intrastate and interstate visitors and remain the largest overall market in terms of visitor spend and volume.

This strategy has taken the key inputs from the *Arts and Culture Plan South Australia 2019 -2024* and the *South Australian Visitor Economy Sector Plan 2030*, which collectively saw over 3,000 industry voices contribute meaningfully to these two foundational sector strategies.

### **This Arts and Cultural Tourism Strategy 2025 has the following strategic goals:**

1. To grow Arts and Cultural visitor spend to \$1.4 billion by 2025.
2. To continue and strengthen the promotion of Arts and Cultural tourism.
3. To motivate and promote year-round enjoyment of Arts and Culture by all visitors.
4. To empower the sector to deliver world-leading Arts and Cultural tourism offerings
5. To champion Aboriginal Arts and Culture among all visitors.
6. To measure, value and amplify the holistic contribution that Arts and Cultural tourism delivers to South Australia.
7. To support the Arts and Cultural sector to create, promote and deliver authentic, sustainable and accessible visitor experiences that reflect and celebrate the State's cultural identity.
8. To support the South Australian Visitor Economy 2030 targets of 16,000 jobs and \$12.8 billion in visitor spend.

To achieve the above goals, the priorities identified in the *South Australian Visitor Economy Sector Plan 2030* have been used to shape this Strategy's framework. These are: Marketing, Experience and Supply Development, Collaboration, Festivals and Events, Industry Capability and Promoting the Value of Arts and Cultural Tourism.

While all these strategic priorities are important to achieving the above goals, industry consultation showed that marketing of Arts and Cultural experiences, and greater collaboration with and between Tourism and Arts and Cultural sectors were the most important areas of focus.

This Strategy also acknowledges the importance of Adelaide as an Arts and Cultural urban centre of excellence. Leveraging Adelaide's strong international Arts and Culture reputation, including its UNESCO City of Music status, helps to drive new and repeat domestic visitation to the city's diverse offerings. It also helps to position Adelaide as a cultural gateway for visitors to encourage further exploration of Arts and Cultural experiences in South Australian regions.



Arts and Cultural Festivals and Events are an important element of the tourism sector, as together with broader destination marketing, they drive visitation and encourage people to stay longer, spend more and explore further. They are a critical and dependable visitor attractor that bring to life the personality and identity of the places where they are celebrated. This Strategy looks at ways to support existing, as well as new, Arts and Cultural Festivals and Events, through targeted marketing, collaboration, and investment.

The opportunities for South Australian Arts and Cultural Tourism are plentiful. The aim is to build on the sector's current strengths and authentic offerings. By working together, the Tourism and Arts and Cultural sectors can continue to grow in a sustainable way.



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## WHAT IS ARTS & CULTURAL TOURISM?

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Arts and Culture is a key part of South Australia's identity. The sector celebrates a rich diversity of people, places, festivals, events, and creative industries with a commitment to access for everyone. The aim is to deliver exceptional authentic experiences that enrich people's lives.

The terms used within the Arts and Culture and Tourism sectors can often differ, so a glossary has been included at the back of this Strategy to support understanding and inclusion of all stakeholders.

This Strategy defines Arts and Cultural Tourism to cover the following key pillars:

- Aboriginal Cultural Experiences
- Performing Arts and Live Music
- Galleries, Libraries, Archives and Museums
- Festivals and Events
- Heritage Experiences
- Outdoor and Public Art

The above definition is by no means exhaustive and has been created to ensure this Strategy has a clear focus and measurable actions. Culture has a broad definition and individual interpretation can vary considerably, as was highlighted in the consultation.

South Australia's creative offerings surprise and delight visitors to the State. Adelaide's reputation as a city for Arts and Cultural excellence, including as a UNESCO City of Music, has been built through the passion and professionalism of artists, exhibitors and performers working across the sector. Iconic festivals and venues such as the Adelaide Fringe, Adelaide Festival, WOMADelaide, Port Adelaide's Wonderwalls Street Art, Tarnanthi, the Art Gallery of South Australia, Her Majesty's Theatre, the Adelaide Festival Centre and the South Australian Museum all play a valuable role as do the city's smaller scale offerings.

Regional Arts and Cultural experiences provide visitors with a great reason to visit, linger longer and support regional communities. Attractions such as the popular Silo Art Trail across the State, Riddoch Arts and Cultural Centre in Mt Gambier on the Limestone Coast, the d'Arenberg Cube in McLaren Vale, The Cedars in the Adelaide Hills and many others, all help to create rich visitor experiences and support a region's cultural identity and community.

For this Strategy, Aboriginal tourism is defined as the act of participating in a tour, experience or activity that involves interaction with an Aboriginal person, community, site or artefact (including retail purchases), in a manner that is appropriate, respectful, and true to the Aboriginal culture, heritage and traditions being presented.

It is understood that where Aboriginal culture is the product, Aboriginal people determine its content and interpretation. As owners of their culture, and through participation, the integrity and authenticity of the product or experience, and its regional context can be maintained.



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## WHAT IS THE VISITOR ECONOMY?

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# THE VISITOR ECONOMY IS ANY MONEY SPENT BY VISITORS IN SOUTH AUSTRALIA.

While the term 'Visitor Economy' is intrinsically linked to tourism, it is much broader. It refers to the money that any visitor spends in the State. That includes international, interstate and South Australians travelling within their own state. It covers people visiting on holidays, for business, education purposes or just visiting family and friends.

The Visitor Economy covers spend beyond just tourism experiences. For example, visitors may purchase artworks or other retail items, get their clothes dry cleaned, buy local wine, or enjoy meals made with local produce. They

may travel by taxi or buy groceries from the local store. The money spent on all these items flows into industries such as the arts, agriculture, transport, and retail. This not only creates more jobs in the tourism industry but other complementary industry sectors as well.

The South Australian Visitor Economy was worth \$8.1 billion in visitor spend in December 2019 and is targeted to grow to \$12.8 billion by 2030.





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## STRATEGIC CONTEXT & GOALS

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There are two major anchor points for this *Arts and Cultural Tourism Strategy 2025* which have guided inputs and recommendations.

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### 1. Arts & Culture Plan South Australia 2019-2024

This Strategy represents the collective voice of the sector and recognises the valuable contribution that Arts and Culture have on the State's people, place, and overall identity.

It is the first comprehensive Arts and Cultural strategy to be designed for the State since 2000 and guides future growth and investment in the sector. Its goals are detailed below:

#### Goals

- To promote the role of Arts and Culture in enriching the lives of all South Australians.
- To empower South Australia's makers and creators.
- To champion Aboriginal and Torres Strait Islander Arts and Culture.
- To amplify South Australia's signature strengths that define the character of the Arts in the State.
- To enhance the physical and organisational Arts and Cultural infrastructure in South Australia.
- To drive a connected approach to advocacy and future government investment in Arts and Culture.

### 2. South Australian Visitor Economy Sector Plan 2030

The State's Visitor Economy delivered \$8.1 billion spend to the South Australian economy in the year to December 2019 and was outpacing the South Australian economy by more than double from 2013-2019. It directly employed 40,500 people across 18,000 businesses.

The *South Australian Visitor Economy Sector Plan 2030* builds on this growth and has a bold ambition of growing the Visitor Economy to \$12.8 billion by 2030 and an additional 16,000 jobs in South Australia. This Plan also highlights the very significant role of regional South Australia in driving the State's overall success.

The strategic priorities identified by the tourism industry for the *South Australian Visitor Economy Sector Plan 2030* are: Marketing, Experience and Supply Development, Collaboration, Industry Capability, Leisure and Business Events, Promote the Value of Tourism. *The Arts and Cultural Tourism Strategy 2025* adopts this structure as its own strategic framework.

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In addition to these documents and the consultation conducted specifically for these strategies, other information that has helped shape the *Arts and Cultural Tourism Strategy 2025* includes the *Creative Industries Strategy 2030*, *Heritage Tourism Strategy (Growing our Heritage Future)*, *City of Adelaide Cultural Strategy 2017-2023*, and the *South Australian Regional Visitor Strategy 2025*.



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## ARTS & CULTURAL TOURISM GOALS

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The intention of this Arts and Cultural Tourism Strategy 2025 is to grow increased visitor participation and spend on South Australia's inspiring Arts and Cultural experiences.

This Strategy incorporates valuable insights from other relevant Arts, Culture and Tourism strategies to ensure a cohesive and sustainable way forward for the sector.

Implementation of the *Arts and Cultural Tourism Strategy 2025* will reflect the cross sector collaboration that shaped it, with an ongoing commitment from the key partners – the South Australian Tourism Commission, Arts South Australia as well as relevant Arts and Cultural and Tourism sector stakeholders.

The following goals emerged from industry consultation as part of the creation for this strategy:

### ARTS & CULTURAL TOURISM STRATEGIC GOALS 2025

- 1 **To grow Arts and Cultural visitor spend to \$1.4 billion by 2025.**
- 2 **To continue and strengthen the promotion of Arts and Cultural Tourism.**
- 3 **To motivate and promote year-round enjoyment of Arts and Culture by all visitors.**
- 4 **To empower the sector to deliver world-leading recognised Arts and Cultural Tourism offerings.**
- 5 **To champion Aboriginal Arts and Culture among all visitors.**
- 6 **To measure, value and amplify the holistic contribution that Arts and Cultural tourism delivers to South Australia.**
- 7 **To support the Arts and Cultural sector to create, promote and deliver authentic, sustainable and accessible visitor experiences that reflect and celebrate the State's cultural identity.**
- 8 **To support the South Australian Visitor Economy 2030 targets of 16,000 jobs and \$12.8 billion in visitor spend.**





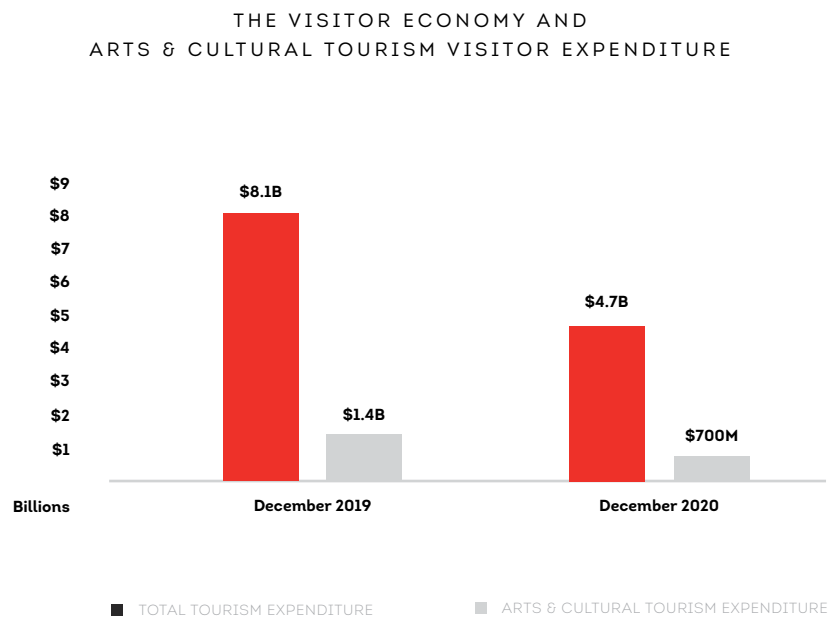
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## COVID-19 IMPACTS

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COVID-19 has had an unprecedented impact upon all the sectors addressed in this Strategy. According to the United Nations World Tourism Organisation, international tourist arrivals across the globe were down 83 per cent in the first quarter of 2021 as widespread COVID-19 travel restrictions remained in place. In Australia, at the time of writing, borders continue to be closed for international travel except New Zealand. This has had a significant impact the tourism industry, dropping visitor

expenditure from a record \$8.1 billion in December 2019 to \$4.7 billion in the year to December 2020. Arts and Cultural Tourism relies heavily on international visitors who are nearly twice as important as compared to tourism more broadly. As such, declines have been more significant in this sector, dropping from \$1.4 billion to \$700 million over the same period because of this global pandemic.





## SOCIAL IMPACT

In addition to economic impacts, the social impacts of COVID-19 are being deeply felt. Arts and Culture are important ways to celebrate and embrace a location's identity, providing visitors with an engaging welcome and sense of connection. Reduced audience capacities, performance cancellations and social distancing requirements have all adversely affected social wellbeing. COVID-19 restrictions and uncertainty in a rapidly changing environment have caused many within the sector to struggle with sustainable operating models.

## CONSUMER IMPACT

COVID-19 continues to impact consumer behaviour in the following ways:

- **Shorter booking lead times** – Ongoing uncertainty and changing travel regulations have led consumers to shift to much shorter booking lead times and flexible booking requirements.
- **Desire for more human connection and expression** – With ongoing social distancing and lockdowns, people are craving a return to social connection and expression – something the Arts and Cultural Tourism sector delivers well.
- **Greater desire for nature connections** – The desire for travellers to connect with nature, space and the outdoors for their mental and physical wellbeing has increased during this global pandemic. This has led to increased interest in regional touring and a higher level of engagement with outdoor Arts and Cultural experiences such as public art, silo trails and outdoor festivals.





## WHAT DO WE KNOW ABOUT ARTS & CULTURAL TOURISM VISITORS?

Arts and Cultural experiences play an important role in the South Australian tourism offering, growing the Visitor Economy and providing unique and varied products and experiences to visitors. These products and experiences, along with promotional marketing assist in driving visitors to our State.

Arts and Cultural tourists contribute a significant part of the \$8.1 billion pre-COVID visitor expenditure in South Australia, spending \$1.4 billion annually. This included \$584 million from interstate visitors, \$410 million from international visitors, \$313 million from intrastate visitors and \$102 million from day trip visitors. With the onset of COVID-19, spend on Arts and Cultural activities by visitors declined by 50 per cent. This decline was most prevalent in the international and interstate overnight markets with declines of 79 per cent and 61 per cent respectively.

As at December 2019, 74 per cent of all international leisure visitors to South Australia undertook an experience that involved Arts or Cultural tourism. This compares to 26 per cent among all interstate visitors, 14 per cent among all intrastate visitors and 8 per cent among all day trip visitors. Among international visitors, the proportion who engage in Arts and Cultural Tourism activities is higher compared to other visitors. However, in terms of actual numbers, many more interstate visitors engage with Arts and Cultural Tourism activities. Given the state of international tourism at the time of writing, this Strategy necessarily targets interstate and intrastate visitors who engage in Arts and Cultural Tourism activities as a primary audience.

The table below shows the different specific Arts and Cultural activities undertaken by each type of visitor. It shows that the highest incidence of engagement with each activity occurs among international visitors. This is broadly followed by interstate, intrastate and then day trip visitors suggesting greater engagement with these types of activities the further from home visitors are travelling.

It is important to be clear about how the Arts and Cultural Tourism expenditure has been calculated. The expenditure figures reflect more than the direct spend on Arts and Cultural activities and they consider incidental visitors as well as those who are motivated in their travel by the Arts and Culture offerings of the destination. Any visitor who indicates that they have undertaken an activity that aligns with the definition of Arts and Cultural Tourism, whether a free or paid experience, is considered an Arts and Cultural tourist. This could be a core part of their visit, or an incidental activity undertaken along with a range of other activities. For these Arts and Cultural tourists, their total trip spend is taken into account, including spend on transport, accommodation, dining and retail. Therefore, the value of the Arts and Cultural Tourism sector outlined in this Strategy is the total trip spend for all visitors with an Arts and Cultural activity as part of their visit.

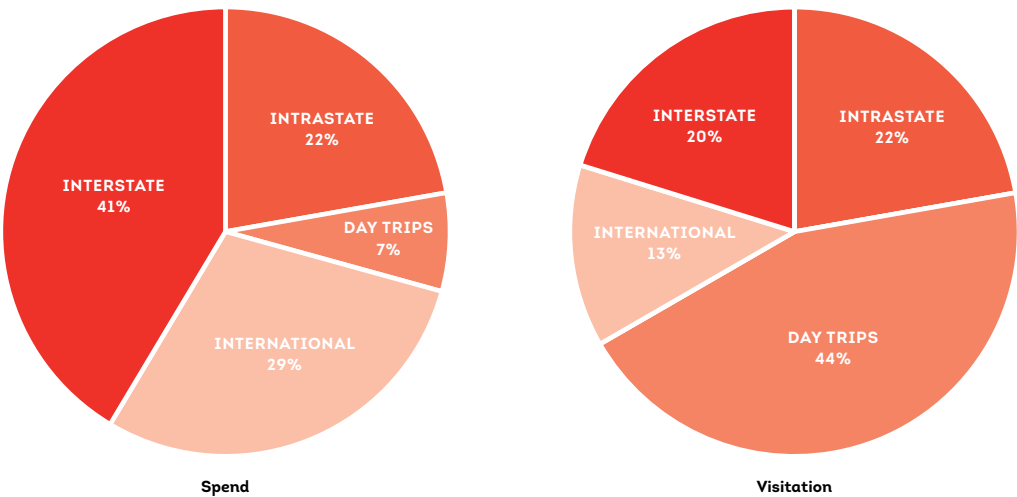
This is a consistent approach used to measure various components of the Visitor Economy. Examples include Nature Based Tourism, which was \$1.6 billion pre-COVID, and Heritage Tourism, a component part of Arts and Cultural Tourism, which was \$1 billion pre-COVID.

ACTIVITY	INTERNATIONAL VISITORS %	INTERSTATE OVERNIGHT VISITORS %	INTRASTATE OVERNIGHT VISITORS %	DOMESTIC DAY TRIP VISITORS %
<b>ALL ARTS &amp; CULTURAL TOURISM VISITORS</b>	<b>74%</b>	<b>26%</b>	<b>14%</b>	<b>8%</b>
ATTENDED THEATRE, CONCERTS, OR OTHER PERFORMING ARTS	15%	4%	3%	2%
VISITED MUSEUMS, GALLERIES OR ART STUDIOS	55%	14%	6%	3%
ATTENDED A CULTURAL FESTIVAL OR EVENT	19%	5%	3%	2%
VISIT HISTORIC BUILDINGS OR SITES	49%	9%	5%	3%
ABORIGINAL CULTURAL EXPERIENCES (TOURS, SITES, DANCE, ART)	32%	1%	1%	<1%
ALL VISITOR EXPENDITURE BY ARTS AND CULTURAL TOURISM VISITORS	\$410M	\$584M	\$313M	\$102M

SOURCE: IVS ANNUAL AVERAGE FOR THE 3 YEARS ENDING DEC 17-DEC 19 – DATA IS FOR LEISURE VISITORS

Across all categories, international visitors have traditionally had the highest engagement across all Arts and Cultural experience types. Considering the domestic market alone, interstate visitors have a greater interest in museums, galleries and art studios, while intrastate and day trips visitors are more likely to attend theatre, concerts, or other performing arts.

THE VISITOR ECONOMY AND ARTS & CULTURAL TOURISM VISITOR EXPENDITURE



INTERNATIONAL VISITORS (PRE COVID-19)

Prior to COVID-19, 74 per cent of international visitors to South Australia participated in Arts and Cultural Tourism activities, spending a total of \$410 million in the Visitor Economy. Each of these visitors spent an average of \$1,439 per trip higher than equivalent interstate overnight, intrastate overnight and day trip visitors. Aboriginal cultural experiences resonate more strongly with the international market with 32 per cent of international Arts and Cultural Tourism visitors undertaking this activity compared to the domestic market where uptake was 1 per cent or less. This market is important to this Strategy in the long term once border restrictions are eased and international travel resumes.

## DOMESTIC

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### INTERSTATE

Interstate visitors engaging with Arts and Cultural Tourism contributed the highest overall spend at \$584 million of the total of \$1.4 billion. Each interstate visitor who engaged with Arts and Cultural activities, on average spent \$1,300 per trip and stayed 4.6 nights. This compares to an average interstate leisure visitor who spent \$886 per trip and on average stayed 5.3 nights.

Proportionally, 26 per cent of interstate leisure visitors to South Australia engaged in Arts or Cultural tourism experiences. This equates to 438,000 interstate leisure Arts and Cultural Tourism visitors to our State each year. Nearly half (48 per cent) of Arts and Cultural Tourism leisure visitors arrived from Victoria, followed by 29 per cent from New South Wales and 11 per cent from Queensland. When compared to normal leisure visitor proportions, New South Wales was overrepresented while Victoria and Queensland were underrepresented.

### INTRASTATE

Intrastate Arts and Cultural Tourism leisure visitors to South Australia contributed \$313 million of the total spend of \$1.4 billion. This market has been least impacted by COVID-19 and remained at a similar level in December 2020. Each of these visitors on average, spent \$660 per trip and stayed 3.1 nights. This compares to an intrastate leisure visitor who spends \$348 per trip and on average stays 2.8 nights.

Proportionally, 14 per cent of intrastate leisure visitors to South Australia engaged in an Arts or Cultural Tourism experience. These activities had a higher incidence among the older audience with 63 per cent of visitors over 45 years. This is 11 per cent more than your average intrastate leisure visitor. These visitors preferred to travel as a couple or with a friend or relative.

### DAY TRIPS

Visitors in South Australia who engaged in Arts and Cultural Tourism activities as part of a day trip contributed \$102 million of the total spend of \$1.4 billion. This incidence is 17 per cent below pre COVID levels, but the decline is less than that seen among international and interstate visitors. Each day trip visitor on average spent \$108 per trip compared to all leisure day trip visitors who spent an average of \$105. Day trips visitors were more likely than other domestic visitors to travel for events and festivals, attend a concert or go to the theatre or other performing arts.



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## SOUTH AUSTRALIA'S DESTINATION BRAND

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Consumer research has identified South Australian experiences with high visitor appeal are the State's exceptional food and wine offerings, immersive nature and wildlife experiences, as well as Festivals and Events, and Aboriginal and heritage experiences. Most often, it is the combination of experiences that attracts visitors rather than one single experience and as such, most marketing involves a blended experiential message.

From a tourism marketing brand perspective, South Australia is positioned as:

'A CURIOUS PLACE: IT IS A PLACE THAT ALWAYS RAISES QUESTIONS AND, IN DOING SO, NEVER FAILS TO REWARD, SURPRISE AND DELIGHT.'

The six destination brand pillars underneath this include:

- Natural Therapy
- Accessible Provenance
- Wildlife Encounters
- Loves a Party (Events and Festivals)
- A Curious Place (Diversity of experiences)
- Coolest Boutique Capital (Adelaide)

SOURCE: SOUTH AUSTRALIAN TOURISM COMMISSION

The SATC, the organisation that promotes South Australia as a tourism destination, has a key role to promote arts, culture and festivals as part of the overall brand positioning for the state. While each individual festival or Arts and Cultural organisation focusses on their own product, the SATC is uniquely positioned to tell the full state story, bringing in footage, imagery and content from all arts, culture and events platforms, as well as other key drivers such as nature and wildlife and food and wine, to form an integrated message for the visitor.

Festivals and Events play a key role in the brand of South Australia, and research shows a combination of niche and general appeal events had the greatest potential to generate visitation across the broadest spectrum of audiences, as well as generating repeat visitation. Festivals and Events that are exclusive to Adelaide are particularly strong at driving visitation.

In terms of the types of events that have appeal, consumer research shows that food and wine festivals have the broadest appeal and national sporting events also rated highly. However, Arts and Cultural Festivals and Events were also a significant attractor, particularly music concerts, cultural exhibitions as well as exhibitions at museums and art galleries.

### ARTS & CULTURE WITHIN THE SOUTH AUSTRALIAN DESTINATION BRAND

South Australia's Arts and Cultural offerings are a way to celebrate and champion the identity and personality of the State. From a tourism perspective, Arts and Culture is currently woven into the above brand pillars of *Loves a Party* (which is a reference to the State's 500 Festivals and Events annually), a *Curious Place* (which is a reference to the diverse and surprising experiences on offer) and also the *Coolest Boutique Capital* - which speaks directly to the identity of Adelaide as a vibrant and diverse Arts and Cultural urban centre filled with festivals, events, street art, performances, music, galleries and museums. *Natural Therapy* and *Wildlife* encounters can also be drivers for regional cultural experiences, including some Aboriginal cultural tourism offerings. Finally, *Accessible Provenance* in South Australia is all about celebrating the place of origin and connects with Aboriginal Arts and Cultural experiences.



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## STRATEGIC PRIORITIES

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This next section details the six strategic priorities for this plan and the actions required within each. Reflective of the overall arts ecology, each of these priorities is interconnected and reliant on each other for a successful and thriving Arts and Cultural tourism sector.



### **1. MARKETING**

Driving awareness, appeal and booking of South Australia by our target consumers.



### **2. EXPERIENCE & SUPPLY DEVELOPMENT**

Balancing supply constraints with demand growth and developing experiences across South Australia.



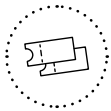
### **3. COLLABORATION**

Working closely together and aligning efforts to optimise outcomes.



### **4. INDUSTRY CAPABILITY**

Cultivating a skilled and sophisticated industry.



### **5. FESTIVALS & EVENTS**

Using Festivals and Events to drive awareness and as a trigger to visitation.



### **6. PROMOTE THE VALUE OF ARTS & CULTURAL TOURISM**

Ensuring a solid understanding of the contribution of Arts and Cultural Tourism.



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## MARKETING

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Our consultation highlighted that Arts and Cultural Tourism sectors consider that marketing is the number one priority action for this Strategy.

Marketing provides a way to tell South Australia's story of diverse and inspiring Aboriginal cultural experiences, museums, galleries, Festivals and Events, performing arts, music, and heritage, motivating visitors to enjoy these offerings during their stay.

Promoting South Australia's impressive and established year-round Arts and Culture, Festivals and Events program, provides a great way to enrich a traveller's experience and can be a compelling reason to visit or extend their stay. This includes not only promoting iconic or hero creative Festivals and Events but also the many other Arts and Cultural offerings that happen year-round and throughout the state.

With such a variety of visitor types seeking to enjoy Arts and Cultural experiences in the State, it is important that the most appropriate media channels, in particular digital media, are matched with the right content and target audience for greatest impact.

SouthAustralia.com, run by the SATC, is a key tool for communication to a wide range of visitors, particularly for those less familiar with the State. While its reach is significant and its content drives substantial traffic to Arts and Cultural Tourism operators, it should not be solely relied upon to communicate the message of Arts and Cultural Tourism in South Australia, and a variety of other media and channels also need to be utilised for amplification.

### The Opportunity

- Raise awareness of the State's amazing city-based and regional Arts and Cultural offerings.
- Motivate increased participation in and spend on Arts and Cultural Tourism experiences.
- Motivate satisfied Arts and Cultural visitors to return and recommend their experience to others.

Most visitors seek a variety of experiences during their stay including great food, wine, immersive nature, and wildlife. The aim is to ensure that inspirational Arts and Cultural offerings are woven into the State's tourism marketing and promotions.

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### MARKETING CASE STUDY: TARNANTHI

Tarnanthi is a state-wide festival through which contemporary Aboriginal and Torres Strait Islander artists share their work and their cultures with an annual exhibition, art fair, artist talks, performances and events. Supported by a marketing campaign aimed to provide a voice for artists and their works, in 2019 Tarnanthi attracted over half a million visitors. 27 percent of visitors to the opening weekend were from interstate and overseas with 84 percent of all visitors stating that Tarnanthi was the main reason they visited Adelaide.

Specific Marketing activities included artist profiles broadcast on SBS, targeted print and press campaigns, in national and international publications and specialist travel magazines, a visually rich social media campaign and prominent outdoor placements in Adelaide.

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## KEY MARKETING PRIORITIES

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Continue and strengthen the promotion of Arts and Cultural experiences through a unifying brand that appeals to potential visitors in Australia and overseas and helps position Adelaide and regional South Australia as cultural must-see places with diverse and inspiring consumer offerings.

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Elevate Adelaide's international reputation through marketing initiatives as a creative and cultural urban centre of excellence, and UNESCO City of Music, to strengthen the city's visitor appeal relative to other Australian cities.

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Position Adelaide as an Arts and Cultural destination, complementing its other appeal factors, while also promoting it as a gateway to regional Arts and Cultural offerings.

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Continue to weave Arts and Cultural experiences into South Australian visitor marketing campaigns along with complementary experiences in Nature and Wildlife and Food and Wine.

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Encourage visitors to explore the depth and breadth of South Australia's Arts and Cultural experiences through rich content, including via new expanded and integrated Arts and Cultural content on SouthAustralia.com and other marketing assets.

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Showcase the State's diverse year-round Arts and Cultural program including authentic Aboriginal Cultural tourism experiences. A key part of this year-round promotion is shining the light on the State's urban and regional festivals and stand-alone cultural events program.

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Provide cooperative marketing opportunities for the Arts and Cultural sector including State-based tourism marketing campaigns.

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Utilise a variety of digital marketing channels including SouthAustralia.com to share Arts and Culture messaging to visitors including engaging with appropriate high-profile influencers in both the Arts and Cultural space as well as other sectors.

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Expand Arts and Cultural Tourism targeting to include international students and their families and business event and conference visitors.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Work collectively to market South Australia with a definitive, unifying, and accessible brand that cuts across all creative sectors to reach international and interstate customers.	<i>Creative Industries Strategy 2030</i>	p48
Develop an annual schedule of festivals for South Australia.	<i>Arts and Culture Plan 2019-2024</i>	p17 (rec 1.1)
Develop South Australia as the centre for Arts tertiary education through development of a compelling brand.	<i>Arts and Culture Plan 2019-2024</i>	p76 (rec 10.1)
Develop an export and investment strategy for South Australia's Arts and Creative industries.	<i>Arts and Culture Plan 2019-2024</i>	p82 (rec 11.1)
Develop a strategy to engage with the broader international student population from the time of their arrival in South Australia.	<i>Arts and Culture Plan 2019-2024</i>	p82 (rec 11.3)
Consistently communicate South Australia's key brand pillars ensuring a strong narrative for all areas of the State, leading to conversion from trip intention to an actual booking.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p22





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## EXPERIENCE & SUPPLY DEVELOPMENT

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New and expanded Arts and Cultural Tourism offerings provide another reason to visit South Australia, stay longer and spend more in both Adelaide and regional communities. They importantly allow visitors to truly connect with locals, the community, and the identity of the place and drive repeat visitation. Importantly, these experiences should be, where possible, linked to the other appealing aspects of South Australia, including Nature and Wildlife, as well as Food and Wine, to ensure a balanced and highly appealing itinerary.

Consultation identified the following key principles that this Strategy needs to champion for Arts and Cultural experiences:

1. *Authentic* – Visitors are seeking experiences that connect them to the local people and environments they visit. Arts and Cultural Tourism experiences help to showcase and express this authenticity, in particular, Aboriginal cultural experiences which can provide a unique way to connect to a deeper, more meaningful travel experience.
2. *Sustainable* – Sustainable tourism development with a focus not only on economic benefits but cultural, social, and environmental contributions are increasingly important to businesses, community, governments and most importantly to visitors.
3. *Accessible and Inclusive* – Arts and Cultural Tourism experiences have broad appeal and as such should be accessible and inclusive for all. This means considering how to support participation rates of older people, those living with disability, and families. They should also be accessible to people for whom English is not their first language, be they international visitors or interstate and intrastate visitors.

### THE OPPORTUNITY

- Continue to develop new and refine current Arts and Cultural Tourism experiences in Adelaide and the regions that match changing consumer interests and are authentically South Australian.
- Package, cross promote or co-create Arts and Cultural offerings with other tourism experiences (accommodation, nature and wildlife attractions, food and wine operators) to make it easier for visitors to include an Arts and Cultural experience as part of their trip, enriching the overall itinerary.
- Support for Arts and Cultural offerings to help expand their bookings through travel intermediaries.
- Attract new visitors to experience Art and Cultural offerings and encourage repeat visitors and word of mouth recommendations.

Aboriginal cultural experiences have always been in high demand with international visitors. A priority is to ensure such experiences are available on a regular basis for visitors to enjoy and that Aboriginal people are instrumental in their development and delivery. There will be a significant development and opportunity for the State as international visitor numbers build again over time. Key amongst these will be the new Aboriginal Art and Cultures Centre at Lot Fourteen on North Terrace, Adelaide which is due to open in 2025.

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### EXPERIENCE AND SUPPLY DEVELOPMENT CASE STUDY: ABORIGINAL ART AND CULTURES CENTRE

The Aboriginal Art and Cultures Centre (AACC) is a significant piece of product development in the Arts and Cultural Tourism sector in the coming years. Located on Kaurna Yarta (Kaurna Country), AACC will be located in the Lot Fourteen precinct in the Adelaide CBD and will become Australia's premier centre honouring more than 60,000 years of continuous First Nations cultures across the country. Supported by the Australian and South Australian Government, through the Adelaide City Deal, the AACC will provide a platform for the Aboriginal and Torres Strait Islander peoples to share their stories and cultures.

The centre will create an extraordinary, immersive experience combining traditional storytelling with modern technology to deliver a major cultural visitor attraction and a source of pride for all South Australians, as the world learns more about the unique stories and cultures of Australia's First Peoples.

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## KEY EXPERIENCE AND SUPPLY DEVELOPMENT PRIORITIES

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Support the development of unique and desirable experiences that are focused on the areas of high consumer appeal within South Australia's Arts, Cultural and Creative strengths.

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Leverage existing strengths such as Adelaide's UNESCO City of Music status, internationally significant collections, and world-leading Festivals and Events to support the development of new innovative Arts and Cultural Tourism products.

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Package and include Arts and Cultural Tourism offerings into travel distribution intermediaries (e.g. travel agents, wholesalers, online tourism aggregators like booking.com) so they can sell these experiences to more travellers.

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Leverage existing resources, such as the Tourism Industry Development Fund to develop new products in Arts and Cultural Tourism.

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Encourage the South Australian Arts and Cultural sector to create tourism experiences by:

- Collectively telling and sharing the Story of South Australia
  - Collaborating and linking experiences within the sector as well as with other tourism experiences.
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Collaborate with Aboriginal cultural representatives and stakeholders to grow and develop Arts and Cultural Tourism experiences including through the Aboriginal Art and Cultures Centre (Lot Fourteen).

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Continue to support development and use of government infrastructure and investments in cultural spaces to create world-leading tourism experiences. Examples include, but not limited to, Her Majesty's Theatre, Adelaide Festival Centre and the Riverbank precinct.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Support the development of unique and appealing experiences that are focussed on South Australia's strengths	<i>South Australian Visitor Economy Sector Plan 2030</i>	p23
Develop an annual schedule of festivals for South Australia.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p23
Collaborate with Aboriginal heritage tourism representatives and stakeholders to identify what needs to be done to nurture and advance Aboriginal heritage tourism.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p2
Advocate for destination planning to connect, maintain and enhance built (cultural) and natural settings, including main streets and gardens.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p2
Commit to the release of an Aboriginal and Torres Strait Islander Arts Strategy for South Australia that capture the previous consultation and strategy work undertaken for this purpose.	<i>Arts and Culture Plan 2019-2024</i>	p62 (rec 9.1)
Revitalise existing regional arts centres as creative community hubs and invest in new centres to meet the needs of the local community and elevate their role and standing.	<i>Arts and Culture Plan 2019-2024</i>	p33 (rec 3.2)
Initiate a program to support the development of content from across several institutions to collectively tell the story of South Australia.	<i>Arts and Culture Plan 2019-2024</i>	p56 (rec 8.2)
Ensure the Adelaide Festival Centre Trust's newly redeveloped venues, including Her Majesty's theatre, enable it to take collaboration with our major performing arts companies to a new level.	<i>Arts and Culture Plan 2019-2024</i>	p39 (rec 5)

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## COLLABORATION

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Collaboration was one of the strongest themes to emerge from the industry consultation for this Strategy. Working together on a shared vision and outcomes will help maximise existing Arts and Culture and Tourism resources, future investment and benefits to the community, businesses, and visitors.

At the heart of the development of this Strategy is collaboration, and it has already spurred some significant linkages between the Arts and Cultural sector and the Tourism sector. These include the partnership between the South Australian Tourism Commission and Arts South Australia in partnering to produce this Strategy, and also the Memorandum of Understanding signed between the key industry peak bodies of Festivals Adelaide, Tourism Industry Council of South Australia (TiCSA) and the Arts Industry Council of South Australia (AICSA). These are key examples of where partnership and collaboration can spur an increased focus on Arts and Cultural Tourism and identify opportunities. It is critical that these emerging partnerships are sustained to deliver long term value to both the Arts and Cultural sector, as well as tourism.

### THE OPPORTUNITY

- Collaboration between existing tourism businesses and the Arts sector to cross promote, develop, and package up visitor offerings and sharing plans, including scheduling of Festivals and Events.
- Collaboration with established sectors and associations within tourism (e.g., Australian Hotel Association, Taxi Council of South Australia, Adelaide Airport, Tourism Industry Council of South Australia) to leverage their networks and expertise to amplify the impact of this strategy.
- Collaboration across and within regions to share best practice and cross promote Arts and Cultural Tourism offerings including Festivals and Events. Visitors do not see borders between regions just great visitor experiences to be enjoyed.
- Collaboration to create itineraries that include Arts and Cultural offerings in both Adelaide and regions.
- Collaboration with the SATC's tourism distribution channels and partners (e.g., travel agents, online booking channels) to include Arts and Cultural experiences for their customers.

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### COLLABORATION CASE STUDY: JAMFACTORY SEPPELTSFIELD

JamFactory and Seppeltsfield Barossa Estate are a key example of a collaborative Arts and Cultural Tourism activation. JamFactory has facilities in Adelaide and in 2013, Seppeltsfield welcomed the opening of JamFactory to the Barossa estate – the first regional extension of JamFactory's Adelaide origins and a new chapter to the region's art tourism offering. The contemporary craft and design studios, gallery and shop are located within the Seppeltsfield Estate itself and is housed in a historic 1850s stables building, which has been extensively renovated.

JamFactory at Seppeltsfield provides a unique hub for craft and design in the Barossa, and expands the existing tourism offering of winery, cellar door, restaurant, and vineyard tours. The facility provides studio space for professional artisans working in a variety of media, including knife making, ceramics, millinery, glass, and leather. A separated walkway through the building allows visitors to meet the makers and view their skills in action with public workshops available, providing a hands-on experience, as well as a gallery for curated exhibitions and retail shop showcasing the output of the facility.

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## COLLABORATION PRIORITIES

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Collaborate across and within all levels of government (Federal, State and Local) to ensure government strategy and investment are aligned as much as possible.

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Continue to support industry-led collaboration to identify and drive opportunities around itineraries and package development, marketing, and promotions.

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Use increased collaboration to identify current and future areas of need for strategic initiatives, training or sector development. This can be achieved via cooperation with organisations such as industry associations.

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Support collaboration with and between metropolitan and regional councils as well as with those providing artistic experiences to further enable and deliver quality Arts and Cultural Tourism offerings at the local level.

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Support collaboration between the accommodation and hospitality sector and the Arts and Culture community to support greater attendance to existing Festivals and Events.

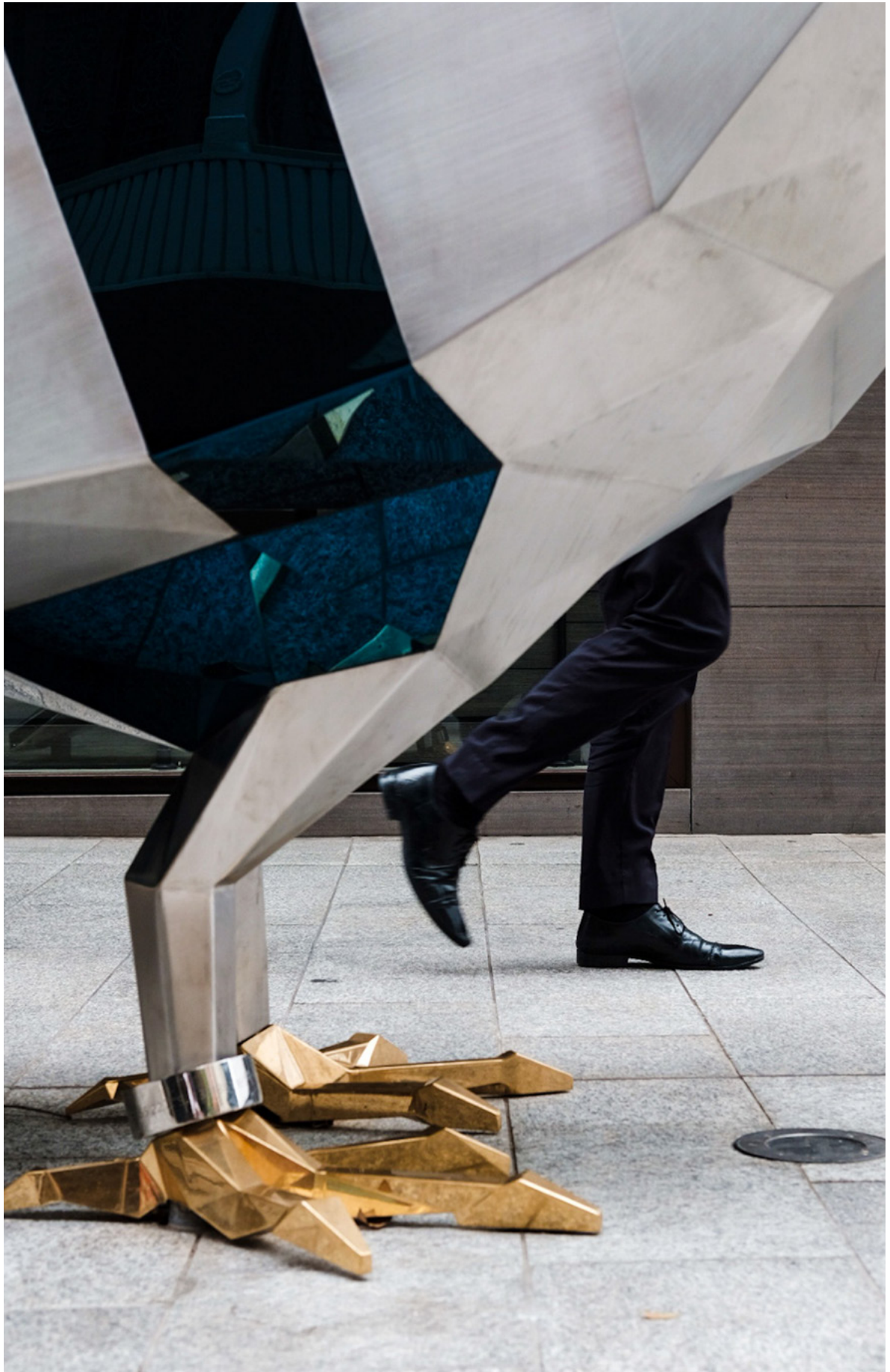
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Continue to grow relationships with other international Arts and Cultural destinations to encourage information and expertise exchange, including the UNESCO Creative Cities Network and the Festival Cities Network.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Support the development of unique and appealing experiences that are focussed on South Australia's strengths	<i>South Australian Visitor Economy Sector Plan 2030</i>	p24
Work with government to develop a Creative Tourism Strategy to attract more cultural tourists to South Australia.	<i>Creative Industries Strategy 2030</i>	p48
Work with the UNESCO City of Music Office to further leverage the power of the UNESCO Creative City designation across creative sectors other than music.	<i>Creative Industries Strategy 2030</i>	p48
Build and promote itineraries that connect heritage experiences and precincts, build storylines, and create journeys.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p1
Drive growth by optimising the experience of international students and their families in South Australia through partnerships with educational institutions.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p24



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## INDUSTRY CAPABILITY

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Individuals working in the Arts and Culture and Tourism industries often have very diverse backgrounds and skillsets. This provides a strong need and opportunity for information sharing, capacity building and learning across the two sectors.

Many business operators in both sectors are small to medium in size or independent artists or creatives, so time and resourcing is an ongoing constraint. For regional operators, physical distances and travel time may add a further layer of complexity. Any training and support must take this into consideration to ensure it is feasible and accessible.

The tourism sector overall continues to face skilled and qualified staff shortages due to the COVID-19 pandemic. This can impact service delivery and the overall visitor experience and has presented a particular challenge in regional areas. Training is now extremely important to grow the pool of tourism workers.

The two sectors function quite differently, and development needs for each are sure to emerge over time and through the increased collaboration driven by this Strategy.

### THE OPPORTUNITY

**Support the Arts and Cultural Tourism sector to understand how to:**

- Develop a shared understanding of key tourism and Arts and Cultural terms and concepts (see glossary) and sector-specific ways of working. Enhance networks and build partnerships across both sectors.
- Optimise their listings on the Australian Tourism Data Warehouse (the national database which is used to populate festival and event and tourism listings digitally).
- Partner with other tourism operators to create, distribute and promote packages or itineraries that include Arts and Culture offerings for both domestic and international markets.
- Create and promote offerings to different visitor groups using digital channels.
- Engage with tourism distribution channels or booking intermediaries.

While COVID-19 currently means domestic visitor markets are the priority, gaining the skills to expand international marketing and bookings will assist Arts and Cultural Tourism experiences to bounce back faster and stronger.

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### INDUSTRY CAPABILITY CASE STUDY: DIVERSE TRAVEL

Diverse Travel's approach to packaging and product development is a great example of successful integration into the Arts and Cultural sector of Visitor Economy distribution tools.

Since 1998 Diverse Travel has been dedicated to capturing the unusual experiences that reflect the unique essence of Australia, with a particular focus on creating tailored small scale itineraries including events, cultural and Aboriginal experiences. Through first-hand experience and the diverse background of their specialist team they have forged strong links with Aboriginal people, high quality tour operators and guides located throughout Australia, and are making these experiences available through international travel trade distribution partners. These networks have been developed through long standing presence in key international tourism markets and developing trusted relationships with these offshore trade partners.

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## INDUSTRY CAPABILITY PRIORITIES

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Provide training, upskilling and support for Arts and Cultural operators and enable them to access existing South Australian Tourism Commission toolkits, webinars and training across marketing, distribution, and product development, with consideration for the nuances of the Arts and Cultural sector.

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Encourage year-round and quality employment (given the seasonality and short-term contracts for some in tourism, Festivals and Events) and create positive volunteering opportunities as appropriate to support the sector.

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Work in partnership with peak industry bodies to support cross-industry collaboration, training and upskilling and enable them to deliver targeted business development programs. This includes the Tourism Industry Council of South Australia, the Arts Industry Council of South Australia, and Festivals Adelaide.

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Review government product development programs for Aboriginal tourism businesses and develop new cross-government approach.

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Foster Aboriginal tourism business development with the support of organisations such as Indigenous Business Australia, the National Indigenous Australians Agency and Regional Development Australia, and harness opportunities around new developments, such as the Aboriginal Art and Cultures Centre.

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Explore opportunities for targeted internships, traineeships, and mentoring programs to grow the sustainability of the Arts and Cultural Tourism sector.

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Strengthen industry links with tertiary education organisations and their programs to shore up sustainable career pipelines.

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Continue to support funding and create incentives for product development, collaboration, innovation, and creativity.

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Enable and foster knowledge and skills transfers between individual businesses and associations in the Arts and Culture and tourism sectors.

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Build connections with the academic and innovation sectors to boost capability and insights into evolving consumer and visitor needs.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Ensure industry has access to strong training and development programs to assist in filling skill gaps.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p25
Ensure continued strong take up of listings on the Australian Tourism Data Warehouse (ATDW) with a focus on commissionable product.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p25
Utilise accurate, relevant and concise research insights to inform business decisions.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p25
Establish a training program to develop a professional tour guiding/story telling sector in South Australia, including a development component for Aboriginal tour guides, especially at key sites and landscapes.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p3
Encourage Foster heritage experiences (including events) to register with Australian Tourism Data Warehouse (ATDW)	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p1

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## FESTIVALS & EVENTS

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*The South Australian Visitor Economy Sector Plan 2030* identified Festivals and Events as a key priority to drive urban and regional visitor expenditure and jobs to 2030.

Arts and Cultural Festivals and Events are important to the tourism sector as they help bring to life the personality and identity of a place and provide motivation to visit. They can also help encourage people to stay longer, spend more and explore further.

Within this Strategy the term Arts and Cultural Festivals and Events covers the State's iconic festivals such as Adelaide Festival, WOMADelaide, Adelaide Fringe, South Australia's History Festival, Adelaide Film Festival, Adelaide Cabaret Festival and South Australian Living Artists Festival (SALA) to name a few, as well as regional festivals such as Festival Fleurieu and Eyre Peninsula's SALT Festival. The definition also includes blockbuster and significant exhibitions, opening nights, expos and art fairs.

With a reputation for delivering a quality program of activities, the aim is to ensure Festivals and Events such as these are showcased and amplified for greatest impact.

### THE OPPORTUNITY

- Promote existing iconic Arts and Cultural Festivals and Events as well as a broader year-round program.
- Leverage non-Arts related festivals and event visitors to include an Arts and Cultural Tourism offering during their visit.
- Create new regional and urban based festivals and events that celebrate Arts and Culture.
- Consider the annualisation of existing biennial festivals where a business case indicates a compelling opportunity.

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### FESTIVALS AND EVENTS CASE STUDY: WOMADELAIDE

WOMADelaide is spectacular festival of music, arts and dance celebrating cultural and creative diversity. Held since 1992 in Adelaide's beautiful Botanic Park, the festival is a unique part of the Australian festival landscape and is one of the major elements contributing to Adelaide's status as Australia's only City of Music in the UNESCO Creative Cities Network.

In the years immediately prior to COVID-19, WOMADelaide attracted over 20,000 people per day for this four-day festival, with over a third of these coming from interstate and overseas, the highest proportion of any major South Australian festival. During WOMADelaide, Adelaide transforms into a truly global city unmatched anywhere else in Australia. It contributes to the local economy by driving demand for hotels and other visitor services, as well as creating opportunities for involvement a wide range of local businesses. The festival works with SATC and other organisations to produce creative content that promotes Adelaide and South Australia to the world.

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## FESTIVAL & EVENT PRIORITIES

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Ensure the continued competitiveness and development of our internationally recognised program of Arts and Cultural Festivals and Events by actively working with the sector to identify and invest in new opportunities for strategic growth

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Enable the sector to deliver unique and premiere experiences that motivate year-round visitation to the State

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Drive increased awareness and attendance (both free and ticketed) to South Australia's diverse Festivals and Events through marketing campaigns, and the creation of a Calendar of Events for the visitor, to be housed on SouthAustralia.com.

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Optimise how visitors attending iconic Adelaide-based festivals, events, and major institutions discover smaller local and regionally based Arts and Cultural offerings.

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Maximise the value and attendance of existing events through greater industry cross-promotion.

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Maximise the opportunities that Festivals and Events offer to a local region, driving positive legacy impacts in cultural and social factors.

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Support the creation, development and expansion of regional Arts and Cultural events via the SATC's South Australian Regional Events Fund.

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Continue to foster growth of new events and the amplification and increased frequency of existing Arts and Cultural Festivals and Events based on consumer demand.

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Streamline regulation to reduce costs to business in order to improve business conditions and empower businesses, Festivals and Events , and local suppliers to deliver iconic Arts and Cultural Tourism products.

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Ensure the sector's readiness for the future by amplifying South Australia's leadership legacy in environmentally sustainable, accessible, fair work and inclusion outcomes from arts and cultural festivals and events.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Further develop South Australian major events, maximising their associated visitor expenditure.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Attract investment and increased sponsorship into major events.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Use business and leisure events to smooth seasonality.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Maximise the opportunities that Festivals and Events offer to the local region, driving positive legacy impacts in cultural and social factors.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Maximise the value of existing events through cross promotion.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Leverage major Festivals and Events to promote our state and tell the story of South Australia.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p26
Develop an annual schedule of festivals for South Australia.	<i>Arts and Culture Plan 2019-2024</i>	p17 (rec 1.1)





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## PROMOTING THE VALUE OF ARTS & CULTURAL TOURISM

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While the value of tourism is connected to commercial outcomes such as job creation and visitor expenditure, it is also being increasingly recognised for its sustainability outcomes and its potential for positive contributions to communities, culture, and the environment.

The value of Arts and Cultural Tourism strongly aligns with these broader tourism sustainability principles by contributing to social wellbeing outcomes, a sense of identity, community resilience, pride, connection, fun and celebration, as well as producing major economic benefits and job creation. Arts and Cultural experiences also add depth and variety to the visitor experience, whether they are the purpose of, or incidental to, the reason for travel.

It is important that the whole value of Arts and Cultural Tourism is measured, tracked, and communicated widely to private and public sector stakeholders. This will drive greater collaboration and support for the sector and help to unlock ongoing government and private sector funding, policy support and community advocacy.

### THE OPPORTUNITY

- Conduct targeted research around the impact and holistic value of Arts and Cultural Tourism and build upon foundational insights from current international and domestic visitor surveys.
- Understand current levels of investment in Arts and Culture, how this translates to tourism offerings in urban and regional settings and the return on this investment from a tourism perspective.
- Deep dive into consumer appeal for new or existing events, exhibitions, and arts organisations activities with targeted outcomes.
- Increased data sharing between Arts and Culture operators, event organisers, associations and government for decision making.

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#### VALUE OF ART & CULTURAL TOURISM PRIORITIES

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Promote the value of tourism to the Arts and Cultural sector and share information and knowledge about the economic contributions of the South Australian Arts and Cultural sectors as a driver for tourism.

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Continue to measure and report on travel expenditure where trips have an Arts and Culture component.

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Explore and implement relevant methodologies to measure and evaluate the value of Arts and Culture to assist growth, development and alignment within the Tourism and Arts and Culture sectors and to value its positive effect on the broader economy, and to understand its impact on place making, city and regional vibrancy and the impetus to travel.

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Champion the value of Aboriginal cultural experiences for visitors, communities, and society.

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Use research learnings, including working with industry associations and research organisations to build a strong evidence base to drive the actions of this Strategy.

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EXISTING PLAN LINKAGES	DELIVERABLES	PAGE REFERENCE
Promote the value of the Visitor Economy in plain, accessible language using evidence from highly credible data sources.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p27
Demonstrate the value of the Visitor Economy to complementary government priorities such as population growth, exporting education and labour force development.	<i>South Australian Visitor Economy Sector Plan 2030</i>	p27
Continue to measure and report on travel expenditure where trips have a heritage component.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p4
Identify champions and best-practice examples to advocate for and grow heritage tourism knowledge, savviness, understanding and capabilities.	<i>Growing Our Heritage Future, Action Plan 2021-22</i>	p4
Develop an evaluation and measurement framework that captures the value of arts and culture, one that builds on and draws together the existing work undertaken in this area.	<i>Arts and Culture Plan 2019-2024</i>	p91 (rec 13.1)





MEASURING OUR SUCCESS

ITEM	ACTUALS				DELIVERABLES				TARGETS			
	DEC 19	DEC 20	DEC 21	DEC 22	DEC 23	DEC 24	DEC 25					
Total Arts & Cultural Tourism expenditure	\$1.4B	\$0.7B	\$0.8B	\$1.0B	\$1.3B	\$1.3B	\$1.4B					
Arts & Cultural Inbound expenditure	\$410M	\$88M	\$75M	\$147M	\$263M	\$288M	\$313M					
Arts & Cultural Interstate overnight expenditure	\$584M	\$229M	\$262M	\$444M	\$544M	\$565M	\$587M					
Arts & Cultural Intrastate overnight expenditure	\$313M	\$300M	\$324M	\$327M	\$344M	\$355M	\$367M					
Arts & Cultural Day trip expenditure	\$102M	\$85M	\$108M	\$113M	\$118M	\$122M	\$126M					
Jobs: Total supported by Arts & Cultural tourism	7,500	3,800	4,100	5,500	6,800	7,100	7,500					
Attendance at cultural institutions*	2.6 million	1.8 million	-	-	-	-	2.6 million					
Arts and Cultural Tourism Listings: ATDW	689	689	>700	>700	>700	>700	>700					
Interstate perception: Festivals	31%	32%	33%	33%	34%	34%	35%					
Interstate perception: Arts & Culture	27%	27%	28%	28%	29%	29%	30%					
Interstate perception: History and Heritage	32%	32%	33%	33%	34%	34%	35%					

\*CULTURAL INSTITUTIONS BASED ON THOSE SUBMITTING DATA TO ARTS SA AND INCLUDE THE ADELAIDE FESTIVA CENTRE, ART GALLERY OF SOUTH AUSTRALIA, SOUTH AUSTRALIAN MUSEUM AND CARRICK HILL. ATTENDEES ARE THE SUMMATION OF ALL ATTENDANCE ACROSS THE FOUR INSTITUTIONS OF BOTH FREE AND PAID ADMISSIONS

## RELATED STRATEGY METRICS

	BASELINE	WAYPOINT OR TARGET
<b>SOUTH AUSTRALIAN VISITOR ECONOMY SECTOR PLAN 2030</b>		
Total Tourism expenditure*	\$8.1B DEC 2019	\$10.0B by 2025 / \$12.8B by 2030
Total Tourism jobs*	40,500 JUN 2019	45,000 by 2025 / 52,000 by 2030
Leisure events expenditure*	\$383M DEC 2019	\$546M by 2025 / \$750M by 2030
<b>SOUTH AUSTRALIAN REGIONAL VISITOR STRATEGY 2025</b>		
Regional visitor expenditure	\$3.6B DEC 2019	\$4.0B by 2025
<b>GROWING OUR HERITAGE FUTURE 2030</b>		
Heritage tourism expenditure	\$1B	\$1.58B by 2030
<b>CREATIVE INDUSTRIES STRATEGY 2030</b>		
Creative industries expenditure	\$1.2B	\$2.1B by 2030
<b>ECONOMIC IMPACT OF GROWING AUSTRALIA'S FESTIVALS - FESTIVALS ADELAIDE</b>		
Tickets issued by five Adelaide festivals	1M 2018-19	1.4M BY 2024-25

\*INDICATES PLANS LAUNCHED PRE-COVID. TARGETS HAVE NOT BEEN ADJUSTED TO REFLECT CURRENT SUPPRESSED CONDITIONS.







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## SUMMARY OF CONSULTATION

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The Arts and Cultural Tourism Strategy was developed as a partnership between Arts South Australia and the South Australian Tourism Commission, driven by the whole of government ethos of “Making a Difference so South Australia Thrives”.

Critical to the success of this strategy is the valuable input and engagement offered from across the Arts, Cultural and Tourism sectors.

This plan incorporated feedback from over 2,500 voices, opinions and survey responses that were captured as part of the *South Australia’s Arts and Culture Plan 2019-2024* formation and over 700 voices, opinions, and survey responses from the tourism sector as part of the *South Australian Visitor Economy Sector Plan 2030* consultation.

Consumer research also played a key part in the development and focus of this Strategy. While much of this strategy has been developed through feedback from key stakeholders who are delivering Arts and Cultural Tourism experiences, it has also integrated consumer research insights ensuring that we are investing in areas of high consumer appeal. As such, consumer insights from Tourism Research Australia, the South Australian Tourism Commission, Tourism Australia and other sources have been used throughout this Strategy.

In addition to these established plans, further consultation specific to Arts and Cultural Tourism was undertaken. This involved over 20 face-to-face engagement workshops, a forum attended by over 100 stakeholders and 160 online survey responses.

The online survey was specifically used to gauge:

- An appropriate target to set for this plan to reach by 2025.
- To prioritise the six focus areas linked to *South Australian Visitor Economy Sector Plan 2030*

Face-to-face group engagements included:

- Adelaide Festival Centre
- Adelaide Film Festival
- Adelaide Symphony Orchestra
- APY Art Centre Collective
- Art Gallery of South Australia

- Art Lab Australia
- Arts Industry Council of South Australia
- Carrick Hill
- City of Adelaide
- Country Arts SA
- Creative Communities Network of Local Government
- Diverse Travel Australia
- Dr Roger Thomas, Commissioner for Aboriginal Engagement
- Festivals Adelaide
- Guildhouse
- History Trust of South Australia
- JamFactory
- Lot Fourteen
- Major festivals forum (Festival Adelaide members)
- Music Development Office (Department of Innovations and Skills)
- Renewal SA
- South Australian Museum
- State Library of South Australia
- State Opera South Australia
- Tauondi Aboriginal Community College
- The Major Events Group
- Tourism Industry Council of South Australia
- Writers SA

While a broad range of stakeholders were generous with their time and provided valuable feedback, three organisations played a particularly large role. Festivals Adelaide, the Tourism Industry Council of South Australia (TiCSA) and the Arts Industry Council of South Australia (AICSA) provided significant assistance in the development of this Strategy. In addition to brokering and hosting an industry forum with over 100 participants, they provided ongoing valuable input, connections, and perspective, for which this strategy has benefited greatly.



## GLOSSARY OF TERMS

TERM	DEFINITION
ACCESSIBLE TOURISM	The ongoing endeavour to ensure tourist destinations, products and services are accessible to all people.
APPEAL	Tourism, visitor or consumer appeal is about a potential visitor wanting to go to a destination, event, or experience because it has a certain collection of offerings or experiences of interest to them.
ARTS ECOLOGY	The interactions between the networks of creators and supporters that shape the demand for and creation of art in the community.
ARTS COMMISSIONS	The process by which an artist creates a work of art or performance piece at the specific request of a private individual, government, or business.
ATDW	The Australian Tourism Data Warehouse is a central content and distribution platform for the Australian tourism industry. The database is made up of over 35,000 tourism product listings which are available for publication across ATDW's multi-channel distribution network.
AUTHENTIC EXPERIENCES	Tourism experiences that genuinely reflect and embrace the people, and the place in which they are offered.
BOOKABLE PRODUCT	A tourism experience that has a set price and can be booked and paid for in advance of the customer's travel.
BRAND PILLARS	The fundamental points that set your tourism region, experience, or offerings apart from your competitors.
CALENDAR OF EVENTS	A listing of 'What's On' with regard to festival and events for potential attendee's place across media channels. These often feature both paid and free activities. Calendar of events can also refer to the intention to create and showcase a broad offering of events across 12 months of the year often to drive visitation throughout all seasons.
COMMISSIONABLE TOURISM PRODUCT	Refers to a fee payable to any intermediary that on-sells your tourism offering. Commissions are only paid when a booking is taken via that intermediary. The level of commission you will be expected to pay will vary from 10-20 percent in the domestic market and up to 30 percent in international markets.
CULTURAL ECONOMY	Refers to the economic benefits that sit around the Arts and Cultural sector including ticket sales, membership subscriptions and jobs in the sector.
FESTIVALS AND EVENTS	An inclusive term to refer to any gatherings for leisure visitors for education, learning and/or entertainment. This could include art and exhibitions, community and cultural events, food and drink events, music festivals and live shows to name a few.
HERITAGE TOURISM	Traveling to experience the places, artifacts and activities that authentically represent the stories and people of the past and can include cultural, historic, and natural resources.
INBOUND TOURISM	Inbound tourism covers all international tourist traffic entering a country. It is also known as 'export tourism' (Australia is the export), because although tourists enjoy their travel experience within Australia, they are paying for it using foreign currency.

PACKAGING	Packaging involves combining several tourism experiences or products together to form a holiday experience. A package could include components such as flights, accommodation, car hire and festival or theatre tickets. Packages could be created to sell directly to customers on your own channels or via a travel intermediary or distributor.
SUSTAINABLE TOURISM	Tourism that takes full account of its current and future economic, social, and environmental impacts, addressing the needs of visitors, the industry, the environment, and host communities.
TRAVEL INTERMEDIARY OR DISTRIBUTOR	Any third party who sells your tourism experience or offering on your behalf. For example, a travel agent, an online booking site, a wholesaler or inbound tour operator.
UNESCO CITY OF MUSIC	Adelaide is a member of the UNESCO Creative Cities Network, the first and only City of Music in Australia. The designation was made in recognition of the quality and diversity of music in Adelaide, as well as music collaboration, historical commitment and our reputation of hosting world class music and arts festivals.
VISITOR ECONOMY	It refers to the money that any visitor spends in the State. That includes international, interstate and South Australians travelling within their own state. It covers people visiting on holidays, for business, education purposes or just visiting family and friends.
WHOLESALE	Companies that promote and on-sell your product directly to consumers and via the domestic and international retail distribution network. They source flights, accommodation, transport, car hire, event tickets, tours, and attractions, negotiate rates and promote their range online or offline. Wholesalers also select individual product elements and then link them with other complementary products to form packages. Overseas wholesalers often use inbound tour operators (ITO), who are Australian-based and act as the conduit for overseas wholesalers.

SOURCES: UNITED NATIONS WORLD TOURISM ORGANISATION, TOURISM AUSTRALIA, SOUTH AUSTRALIAN REGIONAL VISITOR STRATEGY, CITY OF PORT ADELAIDE ENFIELD, BUSINESS VICTORIA, THE NATIONAL TRUST FOR HISTORIC PRESERVATION IN THE UNITED STATES, DESTINATION NEW SOUTH WALES.

## TOURISM & ARTS ACRONYMS

ATEC	Australian Tourism Export Council	IVS	International Visitor Survey
ATDW	Australian Tourism Data Warehouse	NIAA	National Indigenous Australians Agency
SATC	South Australian Tourism Commission	NVS	National Visitor Survey
TICSA	Tourism Industry Council of South Australia	TRA	Tourism Research Australia
AICSA	Arts Industry Council of South Australia	STO	State Tourism Organisation
GLAM	Galleries, Libraries, Archives, Museums	RDA	Regional Development Australia
AACC	Aboriginal Arts and Cultures Centre	RTO	Regional Tourism Organisation
IBA	Indigenous Business Australia		

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