

Message from the Minister for Tourism

Tourism is a key driver of the South Australian economy and is vital to the continued success and future growth of our State.

The South Australian Tourism Plan 2020 identifies the main priorities and goals for the tourism sector and reaffirms the State Government's ambition for an \$8 billion tourism industry by 2020.

Tourism is an important industry, directly employing 31,000 South Australians and indirectly employing a further 23,000. Achieving the \$8 billion potential will generate a further 10,000 direct jobs in our economy, widely distributed through our regions.

This plan includes input from all regions of South Australia. The main message received across the State was the need to increase the reason and desire to visit South Australia. Our State offers the best of Australia: unspoilt nature, premium food and wine, an unhurried pace of life with friendly people.

From vibrant Adelaide to pristine Kangaroo Island to the timelessness of the Flinders Ranges and Outback, there's something to appeal to everyone. From the relaxed pace of the Riverland and Murraylands to Australia's seafood frontier, the Eyre Peninsula, the peaceful coastal towns in the Yorke Peninsula and the world class wine experiences of McLaren Vale and the Fleurieu Peninsula, Limestone Coast, Clare Valley, the Barossa and Adelaide Hills, our State offers a unique experience for visitors.

Ease of access to our regions from the city is a key strength and we have many new opportunities to increase visitors to our State with the upgraded Adelaide Oval, redeveloped Adelaide Convention Centre, as well as the renewed energy of our city laneways filled with bars and restaurants.

Our efforts in the coming years will be focused on increasing visitors from our traditional markets in the United Kingdom, Americas and New Zealand and emerging Asian markets of China and India. We will also continue to increase visitors from interstate and encourage South Australians to rediscover their own backyard.

The South Australian Government is committed to working hard with the private sector to build a profitable and sustainable tourism industry and it is great to see the industry sharing this vision.

Leon Bignell

Minister for Tourism

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Message from the Chair of the SATC Board



The South Australian Tourism Plan 2020 sets out the key priorities for the State through to 2020.

This plan has been developed with extensive industry consultation, throughout all regions of South Australia and across industry, business and all levels of government.

The five Priority Action Areas identified in this Plan by industry reflect the collective view as to where we as a sector must focus to achieve the full \$8.0b potential for the South Australian economy by 2020.

Deloitte identified tourism as one of five 'super-growth' sectors that will drive jobs and growth. We are committed to the mission to drive growth in

tourism in South Australia and believe that leveraging our collective strengths will help us achieve the targets set out in the plan.

The South Australian Tourism Commission Board strongly endorses the South Australian Tourism Plan 2020, and encourages all partners to support the strategic vision that it sets.

The Board and the team at the South Australian Tourism Commission look forward to working with the tourism industry to achieve the opportunities for South Australia outlined in this Plan.

Jane Jeffreys

Chair, South Australian Tourism Commission

1. Executive Summary



Tourism is already an important driver of the South Australian visitor economy.

In the year to December 2013, 5.6 million overnight visitors spent \$5.1b in South Australia¹ across 18,000 tourism businesses, directly employing 31,000 South Australians². Although only 23% of South Australians live in the State's regions², these areas account for 44% of tourism expenditure, underlining the importance of tourism to the State's regional economies and specifically employment at a local level.

Now tourism is set to play an important role as the State transitions from its manufacturing base into a range of new industries. South Australia is not alone in identifying tourism as an important future driver of economic activity. The recent Building the Lucky Country³ study by Deloitte identified tourism as one of the five super growth industries set to drive the postmining boom Australian economy.

Analysis undertaken by BDA Marketing Planning shows the South Australian tourism industry is capable of achieving more than merely average growth. Its potential has been identified as \$8.0b by December 2020⁴ and requires competitive share gains across all sectors of the South Australian tourism industry.

The achievement of this \$8.0b potential for the visitor economy is the focus of this Plan.

The South Australian Tourism Plan 2020 identifies that for the State to reach its expenditure potential the focus must be on five priority action areas:

- Driving demand.
- · Working better together.
- Supporting what we have.
- Increasing the recognition of the value of tourism.
- Using events to grow visitation.

Recognising the need to provide a supportive environment for the tourism industry's growth, an additional two areas have been identified as areas to influence:

- The total cost of doing business.
- Investment in public infrastructure.

¹ Tourism Research Australia, National Visitor Survey and International Visitor Survey

² Tourism Research Australia, Tourism Satellite Account, 2012-13

³ Deloitte 2014, Positioning for Prosperity, Building the Lucky Country #3 http://www.deloitte.com/au/luckycountry

⁴ BDA Marketing Planning analysis for the SATC



2. The Planning Framework

Purpose

The South Australian Tourism Plan 2020 fits within the Australia-wide approach of Tourism 2020¹. This Plan is focussed on achieving the South Australian tourism industry's full potential of \$8.0b of visitor expenditure by 2020, which would generate nearly 10,000 additional direct jobs in the South Australian economy.

This is a plan for the whole tourism industry, from solo operators right through to major businesses, associations and all levels of Government. It takes the broadest possible scope, recognising many types of businesses are part of the visitor experience.

Strategic priorities are identified that are triggers for lasting growth, job creation and visitation across all regions of South Australia. It defines a clear set of actions, allowing efforts to be coordinated and resources to be focussed on the essential elements that will make a difference.

This Plan will provide the foundations for:

- A profitable flourishing tourism industry that is widely recognised as a core part of the South Australian economy.
- A significant job provider contributing to the growth of resilient, vibrant and sustainable communities and regions across South Australia, supporting social, cultural and environmental outcomes as well as economic.
- Our tourism experiences to have wide seasonal appeal, deliver competitive authentic experiences and create strong word of mouth marketing and repeat visitation resulting in greater investment and reinvestment in the 'right' products for our target markets.
- Consumers to have a clear understanding of our competitive advantage and the depth and diversity of our experiences. They will have a high desire to visit in the near future. This desire is readily and easily facilitated by the South Australian tourism industry's capacity to inform them of the best options for their visit and to manage visitor bookings.
- Stakeholders in tourism to have a good understanding of their role, connections and relationships with each other and more widely across varied sectors in the economy. A strong collaborative approach helps achieve agreed priorities.

Successful implementation of the strategic priorities in this Plan will create flow on effects and impact many other aspects and tasks needed to ensure a quality visitor experience. Hence this Plan does not include a list of all actions required in destination management planning across South Australia.

Scope

The Plan recognises that it is only through coordinated and focussed efforts by all stakeholders that the \$8.0b tourism potential can be reached. The actions therefore relate to the work of all stakeholders.

There are many types of visitors to South Australia - together with those seeking a memorable holiday experience, visitors come to see friends and relatives, undertake business, meetings, conferences, education, and attend festivals and events, and they are all acknowledged in this Plan. Increasingly these categories are not distinct but blur together as people's busy lives mean they combine work and leisure to a much greater extent than before.

While our international and interstate visitors are vital for our industry and our economy, the value of our intrastate and domestic day trip markets is also recognised. This Plan covers all four categories. It also notes that while some markets will be drivers for market share growth through higher visitation and greater spend, our existing markets will also require maintenance and support.

This Plan is set in the context of the current dynamic economic situation, noting the need for the SATC to focus their work on priority tasks rather than dissipating their efforts through too many varied areas and the growing role of our industry associations in the provision of industry and business support programs. Tourism across Australia is traditionally highly fragmented. With the dominance of Small to Medium Enterprises (SMEs) in South Australia's tourism industry, the direction setting of this Plan has explicitly considered the resources available and practical growth pathways our industry is capable of achieving.

Background

The South Australian Tourism Plan 2020, launched in mid 2014, is the seventh such plan for South Australia and builds on the foundations laid in place by the 2009-2014 Plan. Some areas described in the earlier Plan are ongoing, allowing us to keep the momentum and gains already made, while in other areas significant gaps have been closed and hence are no longer critical priorities. Hence, a number of the high priority actions of 2009-14 continue through this Plan, while others have a lesser focus.

This Plan has been developed through extensive consultation with each of South Australia's tourism regions and with stakeholders across industry, business and Government, involving the input of over 400 individuals to date. It has also been developed using information and insights from Federal agencies such as Tourism Australia, Tourism Research Australia, and Austrade, as well as the SATC. See Section 8: Acknowledgements for more information.

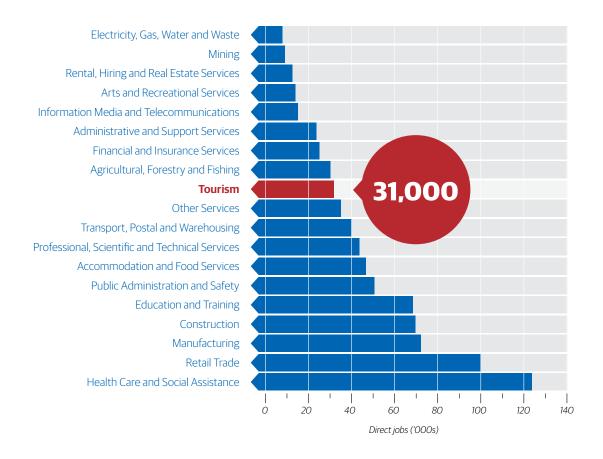
¹ Tourism 2020 is managed by Austrade and is a whole of Government approach to double the size of the industry's overnight visitation to between \$115 billion and \$140 billion by 2020 www.tourism2020.gov.au

3. The Current Situation

Tourism directly employs 31,000 South Australians and makes a substantial contribution to the State economy. This level of employment is three times the number employed by the mining industry. The tourism employment figure rises to 54,000 when including South Australians indirectly employed by the tourism industry. Employment is spread across the South Australian economy, covering all regions and consuming goods and services from every part of the economy, most significantly across cafés, restaurants, retail establishments, accommodation providers, transport services, tour companies, the Arts and events. Also, as tourism is a labour intensive industry, growth in its economic contribution produces more jobs per dollar than most other industries.



SA Direct Industy Employment 2012-13



Source: ABS 6291.0.55.003 Labour Force, Australia (May 2013) and Tourism Research Australia, Tourism Satellite Account (June 2013).

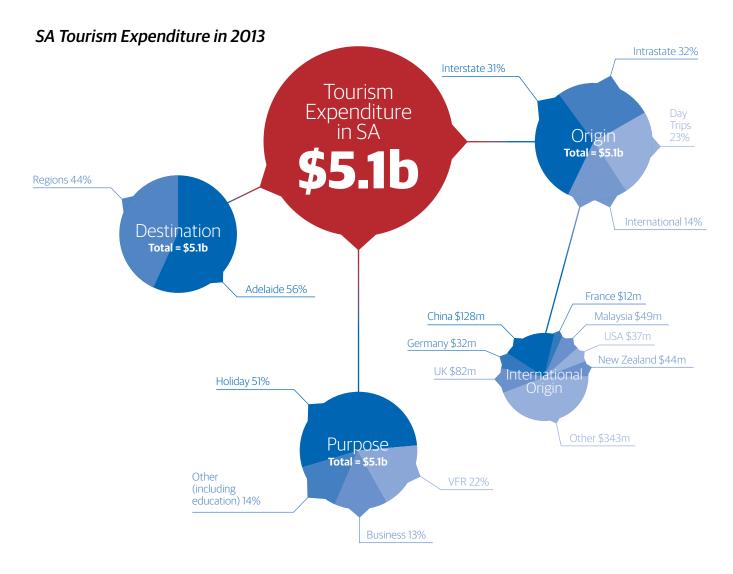


Tourism expenditure in South Australia in the year to December 2013 was \$5.1b. The diagram below shows visitor expenditure occurs across a broad geographical area, for a broad range of purposes and by visitors from a broad range of origins.

Adelaide currently receives 56% of total visitor expenditure to South Australia. Therefore the regions share the remaining 44% of expenditure; however given that the Australian Bureau of Statistic reports that only 23% of the State's population live outside of Adelaide, tourism expenditure is an important economic driver in regions. It is essential for Adelaide and the regions to work cooperatively together, as research consistently shows visitors to South Australia have the highest satisfaction when their visit includes a mix of both Adelaide and regions.

While the holiday sector represents the most valuable group, other significant purposes of visitor expenditure are 'visiting friends and relatives' (VFR) and business and international education purpose visitation. With each of these types of visitors the tourism industry has areas of greater and lesser influence.

By origin, 86% of tourism expenditure in South Australia is spent by Australians, with 14% spent by higher yielding international visitors. Within the domestic market, expenditure is roughly evenly split between high yielding low volume interstate visitors, local South Australian overnight visitors and low yielding but high volume domestic day trippers.



Source: Tourism Research Australia, International Visitor Survey/National Visitor Survey, Year to December 2013

Tourism Performance to Date

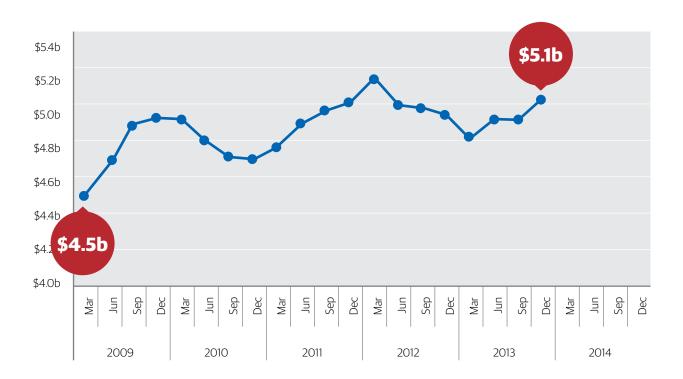
Tourism expenditure has grown from \$4.5b since the commencement of the South Australian Tourism Plan 2009-2014, to \$5.1b by December 2013. With a year still to go to the final measurement period, it seems likely that the full potential identified in the previous plan of \$6.3b in tourism expenditure by December 2014 will not be achieved.

However, it should be noted that this period included the Global Financial Crisis, an exceptionally strong Australian dollar and a significant expansion in outbound travel. Nevertheless, by the end of 2014 the South Australian tourism industry will likely have grown substantially above the original trend forecast of \$5.0b.

Growth since 2009 was as follows:

- International expenditure, which grew 26% to \$727m in 2013.
- Domestic Day Trip expenditure also experienced strong growth, up 22%.
- Domestic overnight expenditure was more sluggish over the period, growing 7%, being heavily affected by the nationwide strong outbound travel trends.
- Outbound travel from Australia grew by over 50%, from 5.8m to 8.7m trips. Fortunately, this rate of growth has since slowed and Australians' interest in domestic travel is returning, particularly in the intrastate market since 2011.

South Australian Tourism Expenditure 2009-2014



Source: Tourism Research Australia, International Visitor Survey/National Visitor Survey, Year to December 2013



4. Future Growth

Extensive research exists on global and Australian travel trends. Tourism Australia's website links to a number of relevant summaries (www.tourism.australia.com). The recent Deloitte study on the Australian economy¹ listed tourism as among the 'fantastic five' next growth wave sectors, highlighting its capacity to deliver jobs and contribute to the economy, and also noting opportunities and challenges. Some of the key external factors affecting the South Australian tourism industry through to 2020 include:

- Increased usage of digital and social media.
- Continued aging population Baby Boomers are now hitting retirement age with over 240,000 turning 65 in 2015.
- Rise in inbound visitation, particularly from Asia.
- Movements in the Australian dollar.

- Slowing outbound passenger growth.
- Continued focus and importance of experiences.

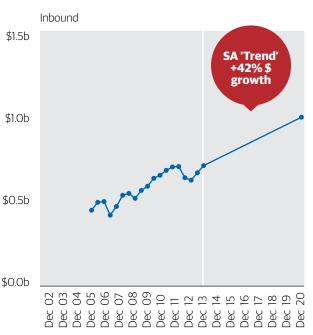
The national *Tourism 2020*² framework, developed in 2010, identifies \$115-\$140b in tourism industry potential for Australia. Consistent with this framework is the \$8.0b potential for South Australia, which is also reflected in the broader State-wide SA Strategic Plan³.

In December 2013, total tourism expenditure in South Australia was \$5.1b. If we as an industry hold our current market share across all markets, visitor expenditure will grow to \$6.7b by 2020, strongly led by a 42% rise in inbound expenditure (19% trips growth) and 33% rise in interstate expenditure (12% trips growth)4. Intrastate visitation will grow slower, with overnight trips rising by 6% and Day Trips rising by 9% by 2020.

Interstate versus Inbound Expenditure December 2013-2020

All purposes expenditure (\$billions) 12 month moving total





Source: Tourism Research Australia and BDA Marketing Planning

¹ Deloitte 2014, Positioning for Prosperity, Building the Lucky Country #3 www.deloitte.com/au/luckycountry

² Tourism 2020, www.tourism2020.gov.au/

³ SA Strategic Plan, saplan.org.au/targets/4-tourism-industry

⁴ The difference between growth in expenditure and trips is predominantely related to inflation.

While it must be acknowledged that holding share is not a given and requires ongoing efforts, the focus of this Plan is to achieve the \$8.0b tourism industry potential of South Australia by 2020. This requires competitive share gains across all demand streams from high yield inbound and interstate visitors, through to lower yielding intrastate and domestic day trip visitors. A result for the State approaching the \$8.0b maximum identified potential will be an outstanding achievement, which will also bring with it nearly 10,000 additional direct jobs to South Australia.



South Australian Tourism Expenditure and Jobs



Source: Tourism Research Australia, BDA Marketing Planning and SATC. Trend' is based on historic expenditure growth since 2005, 'Hold Share' incorporates forecast growth at constant market share levels, while 'Full Potential' reflects the full achievement of the SA Tourism Plan 2020. Terminology is consistent with national Tourism 2020 reporting.



5. Priority Action Areas

The Priority Action Areas highlighted here are the identified practical actions that are triggers for growth. Achievement of the goal requires a consumer focussed orientation in all aspects of decision making. A consumer led focus will impact our thinking and approaches, and will benefit all parts of our industry to ensure investment and effort is based on fact and opportunity. Leadership from Government and within business and industry will also be essential to maintain a clear focus and continued effort on these identified priority areas.

Five direct Priority Action Areas have been identified through consultation. The South Australian tourism industry has the capacity to action these directly and must focus on these to make a difference and grow visitor expenditure.

These areas include:

- Driving demand.
- Working better together.
- Supporting what we have.
- Increasing recognition of the value of tourism.
- Using events to drive visitation.

In addition, two further areas of critical importance were raised consistently by industry during consultation. These also require our targeted actions to ensure improvement, but generally are not within our capacity to alter directly, and rather require us to influence other decision makers.

- The total cost of doing business.
- Investment in public infrastructure.

Detail on the specific measures and their 2020 potential appear in Section 6: Evaluation and Reporting at the end of this Plan.



Driving demand

It is essential that South Australia drives united and collective marketing messaging, to ensure consistency across industry and the SATC in getting the right message to the right markets and consumers. It is well established that visitors respond most strongly to messages with an experiential focus, particularly

around South Australia's competitive advantages of food and wine, nature and wildlife encounters and accessible urban experiences. To build visitation and spend we need to recognise and focus on South Australia's areas of competitive advantage and better tell the story around these experiences.

Actions

- Develop well connected and collective marketing approaches that:
 - Recognise and facilitate the connection of all relevant parts of the tourism industry, including operators, regional tourism organisations, trade partners, distribution partners, media partners and collaborators, and visitor information centres.
 - Have the SATC drive awareness and appeal of visiting South Australia, and industry provide the tactical offering in a seamless and attractive way for the consumer.
- Continue to implement an international marketing focus that recognises Asian growth opportunities and converts these but doesn't lose sight of the existing markets that drive current regional visitation and length of stay.

- Continue the strong interstate marketing approach that is highly targeted and leverages current assets.
- Encourage South Australians to rediscover their own State.
- Work collaboratively with partners to use experiences to drive conversion.
- Work with other parts of the visitor economy such as international education and business and leisure events to drive visitation.
- Ensure the tools are available to assist in planning and booking itineraries and travel to and within South Australia. This includes further building of emerging digital options appropriate for our target markets.

Measures:

- Overall tourism expenditure in South Australia.
- International visitor expenditure in South Australia.
- Interstate visitor expenditure in South Australia.
- Intrastate visitor expenditure in South Australia.
- Regional dispersal.



Working better together

Australia's tourism industry is traditionally highly fragmented and overwhelmingly composed of many Small to Medium Enterprises (SMEs). Of the 18,000 tourism businesses in South Australia identified by the ABS, over 16,000 employed less than 20 people. To fulfil our growth potential South Australia needs a stronger more collaborative industry, empowered by leadership from across Government, business and industry. Industry mobilisation across all stakeholders will allow us to better pool our resources and insights, agree on shared priorities and leverage the opportunities for driving growth.

It is also important to coordinate with stakeholders outside of the tourism industry. South Australia's great strength for our visitors is the diversity and authenticity of the experience, and much of this is dependent upon organisations and institutions not directly connected with tourism. For example, the tourism industry already works closely with sectors such as wine, food and the Arts that are strong and globally recognised, but also are of interest to our visitors. We need to continue to develop partnerships across all sectors of our economy to create productive outcomes across South Australia.

Visitors also come to South Australia for many reasons, business, events, visiting friends and relatives and education etc. Leveraging all these opportunities will build our industry further.

Actions

- Continue to build clarity around stakeholder's roles and make the most of available resources, particularly with industry associations and as well Regional Tourism Organisations (RTOs) and Local Government Associations (LGAs).
- Work with Tourism Australia and aviation partners to maintain and further grow recent solid gains in air access to South Australia for key markets.
- Improve the capacity of the tourism industry to work collectively by fostering effective collaborative structures and mechanisms.
- Develop innovative partnerships across sectors and different industries that deliver outcomes for tourism, including areas already active in tourism such as food and wine, the Arts, business events and international education.
- Use research and insights to track growth and recognise trigger points for the development of the next stage of improved supply. Work collectively using destination development planning tools to ensure visitor requirements around growth in demand and supply are supported and delivered.
- Encourage a greater depth and breadth of clustered tourism experiences to provide a stronger reason for visitors to experience different parts of South Australia.
- Use consumer insights and data to understand and grow key niches such as nature and touring and nationally emerging areas such as indigenous tourism.

Measures:

- Destination Action Plans (DAPs) collectively agreed to and in place in all tourism regions.
- Membership levels of tourism industry associations in South Australia.
- Industry participation and engagement with networking and information events, as organised by the SATC, and industry associations.



Supporting what we have

There have been substantial supply side gains in South Australia during the term of the last Tourism Plan, including unprecedented growth in domestic and international aviation capacity and substantial infrastructure development along the Adelaide Riverbank precinct. Regional areas have also seen upgrades and the construction of new accommodation stock. While new investment opportunities will drive further tourism development, it is vital that we also reap the rewards sown

by existing investments. This driver concept extends beyond recently completed infrastructure, and acknowledges greater profitability of our existing industry is essential to support re-investment and new developments. In short, we need to utilise existing infrastructure to foster quality contemporary experiences, particularly those that drive conversion and entice our visitors to come.

Actions

- Help businesses, industry and Government make better decisions by mutually sharing insights on what consumers seek, allowing the most appropriate experiences to be showcased to the right consumers in a coordinated approach. These insights will assist in improved risk management approaches that drive the right investment decisions.
- Industry needs to continue to deliver and further strengthen its delivery of high quality experiences and better customer service to visitors to ensure strong satisfaction, repeat visitation and word of mouth marketing. A range of accreditation programs and awards contribute to this outcome.
- Ensure Adelaide acts as a strong hub, and works collaboratively to drive visitation to the regions.
- Support airlines by growing demand through continued cooperative partnerships to maintain current increased inbound air capacity to South Australia, then investigate further capacity to grow.

- Support a strong domestic and regional aviation environment.
- A focus on growing visitation in off-peak periods will strengthen the overall return on existing assets – both public and private. While much of this needs to be done by individual businesses and regions, specific effort should be through:
 - Leveraging the tourism benefit of existing public infrastructure, such as the Adelaide Riverbank precinct.
- Ensuring South Australian tourism businesses can maximise their opportunities to develop through easy access to the diversity of current and future business support programs, including grants, training and workforce support, to keep their businesses at the forefront of our industry. These programs are provided by many entities at local, State and Federal level, as well as by industry associations.
- Supporting existing business and leisure events to drive increased expenditure.

Measures:

- Current inbound air capacity.
- Room occupancy in Adelaide and regions.

• Off-peak visitation and expenditure in Adelaide and the regions.



Increasing the recognition of the value of tourism

The direct role tourism plays in the State's economy is substantial providing \$5.1b in expenditure, 31,000 direct jobs, and a further 23,000 jobs indirectly across the South Australian economy. As previously discussed, this direct employment is three times the size of the mining industry and when we take into account those indirectly employed by tourism, 54,000 South Australian jobs – or one in every 15 – are supported by tourism. Tourism's significance is even greater after adding the indirect impact through economic multipliers, its support of a strong state Brand, and its contribution to the resilience and flexibility of towns

and communities across South Australia. Sharing messages around the growth and significance of visitor expenditure in the State will help others understand and help facilitate the actions identified in this plan. The shared understanding will improve decision making around topics such as policy making, public infrastructure, parks, transport, and community festivals. Appreciation of the role tourism plays at the local economy level also helps individuals and communities take a more ambassadorial role in welcoming and showcasing their communities and places to visitors.

Actions

- Develop relevant messages on the value of tourism to the economy at State, regional and local level and disseminate widely. These messages need to be relevant and tailored in the language that is effective for each audience.
- Develop case studies that clearly demonstrate the value of tourism and return from tourism investment (such as around Adelaide Oval, specific festivals and include regional and local examples).
- Provide relevant messages at community level. Encourage locals to become advocates for tourism and thereby actively drive the 'Visiting Friends and Relatives' market, improving community pride, supporting Local Government and community approaches that welcome tourism to their place (from planning through to festivals) and recognising and facilitating the links between their own work and tourism to foster the outcomes of this Plan.
- Ensure decision makers, both public and private, have the research and insights on tourism to make the best decisions for their situation. Identify strategic areas or projects within other parts of Government that require targeted insights to deliver tourism outcomes, including for policy changes as well as infrastructure.
- Industry associations to work collectively with other key partners to deliver coordinated, targeted and timely messaging on the value of tourism.

Measures:

- Availability and usage of economic impact reports through the SATC Corporate website.
- Development of new metrics that increase the understanding of the broader impact and value of tourism.



Using events to grow visitation

High profile events and festivals help grow awareness of South Australia as a diverse and attractive place to visit. They support the Brand and consequently contribute to increasing overall visitation. In addition, events and festivals directly drive visitation giving potential visitors a reason to visit South Australia now. South Australia is well known for its active events and festivals calendar, and so we are well positioned to further leverage off this established strength. Many visitors already plan their holidays to South Australia specifically around these events. Both the major Adelaide events and regional offerings are

relevant here. Utilising events and festivals to create reasons to visit across the whole year and strengthen the quieter seasons is a core aim. It should be noted that events and festivals have a role across all of the previously outlined Priority Action Areas and should be treated in a coordinated way.

While growing the size and number of events the challenge is to encourage visitors to stay longer and add more touring options, which ultimately leads to greater visitor expenditure in South Australia, and to create repeat visitation.

Actions

- Attract or develop new events to drive visitor expenditure to South Australia, with a focus on events outside the peak season.
- Grow existing events in visitor volume and yield.
- Drive increased business events, particularly via newly developed infrastructure in Adelaide.
- Use major events to showcase South Australia in the media, with a view to spurring future leisure trips.
- Work with tourism partners to drive additional expenditure before and after events and festivals.
- Encourage visitors to disperse around South Australia through regional events and festivals.
- Increase collaboration by stakeholders to grow the outcomes of the events and festivals calendar.

Measures:

- Grow events contribution to visitor expenditure.
- Grow the media broadcast and publicity value of major events.
- Increase the impact of events on regional visitation.



Provision of a supportive environment

During the consultation process, two themes were consistently raised by industry as barriers to further growth. Although the tourism industry has only a limited ability to directly affect many of these outcomes compared to the Priority Action Areas above, it is important that they are identified and that stakeholders work to positively affect these areas.

It is worth noting that success in the Key Priority Area of 'Increased Recognition of the Value of Tourism' will assist the progression towards provision of a supportive environment, as it will help other decision makers to consider tourism opportunities when making decisions. Specific areas include cross Government policy making, program design and infrastructure decisions.

The total cost of doing business

- Improved investment environment, including easier access to capital.
- Positive policy environment, conducive to sustainable tourism development.
- Increase the overall viability of trading beyond traditional hours, specifically including the impact of penalty rates on a 24 / 7 sector.
- Streamline licensing requirements.
- Support workforce planning and development.
- Address labour force and skills issues.
- Easier planning processes.
- Overall support of innovation and entrepreneurship.

Investment in public infrastructure

- Access
- Easy access both to South Australia and within South Australia is critical.
- By road and air but also sea (including cruising), rail, public transport, hire vehicles.
- Increased traveller connectivity through telecommunications.
- Improved and more reliable essential services and utilities such as power, water and other core needs, especially in remote areas of the State.
- Improved wayfinding and road infrastructure, including road pullovers and signage.
- Improve the use of consumer insights and data to assist decision makers to incorporate tourism in major investment decisions.



6. Role of Key Stakeholders

This Plan recognises the growth of tourism requires integrated and collaborative work between multiple stakeholders. The roles of key private and public stakeholders are listed here. It recognises that Government, particularly SATC has a major role in leadership around this Plan, especially in fostering and maintaining the focus on priority areas that will drive the changes needed.

Government

South Australian Tourism Commission:

- Provide leadership for industry and government for the collective ownership and achievement of the outcomes outlined in this Plan. This includes providing guidance, sharing of insights and working collaboratively with industry.
- Foster collaboration among industry, business and Government.
- Drive demand for South Australian experiences.
- Direct to consumer marketing.
- Public Relations and Famils.
- Digital marketing and facilitation.
- Support the timely sharing and provision of research and insights that support good decision making by all stakeholders in the industry.
- Work closely with aviation partners and other key access and transport stakeholders to maintain and grow capacity and ease of access.
- Improve understanding of the tourism industry's contribution to South Australia's economy.
- Facilitate cooperative marketing.

- Support the industry's ease of access to external business support programs, grants and other opportunities for industry development.
- Work closely with regions, industry associations and partners to grow tourism across the whole State.
- Events South Australia (ESA) is a division of the SATC. It exists to promote South Australia as a tourism destination and attract visitors to the State through securing, managing, developing and supporting leisure events and festivals and providing leadership to the events and festivals industry.

Other parts of State Government

 Recognise the importance of tourism to South Australia's economy and prosperity and work with SATC and others to support the growth of tourism on a range of issues that influence the tourism industry, e.g. visitor management in Parks, investment attraction, skills and labour shortages, transport access.

Commonwealth Government

- Drive the development of strategy and policy relating to the tourism industry, and its implementation at a national level, particularly in areas critical to tourism growth such as visas and aviation.
- Tourism Australia works to maximise the opportunity for South Australian product to benefit from international visitor growth.



Local Government

- Work with the Regional Tourism Organisations on specific activities, including festivals and events, investment attraction and marketing.
- Support the provision of visitor information through Visitor Information Centres.
- Foster local community capacity to be ambassadors for visitors in their area.
- Work with the tourism industry to help it deliver the social and economic outcomes to help create resilient and thriving local communities.
- Take into account the value of tourism to the local area in broader decision making.

Industry

The South Australian tourism industry is composed of over 18,000 businesses who directly deliver the experiences, products and services that visitors come to South Australia for. Individually these businesses need to focus on the most appropriate markets for their specific product. It is also recognised that by working together we can more effectively grow the pie and build the tourism industry. It is critical that customer service be continually improved to ensure that the industry delivers quality, authentic South Australian experiences. Quality experiences will drive growth by word of mouth marketing and encourage repeat visitation.

There are many organisations and associations that have a vital role as aggregators and advocates for the tourism industry.

Regional Tourism Organisations

- Create strong local collaboration between operators to implement actions around needs and priorities, in both marketing and supply side improvements.
- Build an understanding of the importance of tourism and specific regional role it has, and can play, in communities, Local Government and other organisations.

Industry Organisations:

- A number of industry organisations are active in the tourism sector. These, together with many other associations, jointly play a vital role in building South Australia's tourism industry, particularly around:
 - Industry leadership around facilitating the priorities and actions in this Plan.
 - Supporting collaboration, cross region and cross sector partnerships to help grow the industry.
 - Advocating on the importance of tourism in South Australia.
 - Focusing on improving the quality of and demand for tourist experiences through a range of activities such as famils, accreditation programs, awards, destination marketing, conferences and networking.
- Aggregating and sharing industry data to assist all decision makers around current issues in the industry o Aggregating industry needs to allow timely and clear prioritisation of actions, particularly around areas such as training.



7. Evaluation and Reporting

An annual review and report against the South Australian Tourism Plan 2020 will be undertaken and placed on the SATC Corporate website. As this Plan covers six years of actions, a major review including stakeholder consultation will be conducted at the three year mid-point and revised actions developed if required. Progress on actions and issues affecting implementation and progress will become a standing agenda item in SATC Board meetings, as well as SATC meetings with Regional Tourism Organisations and industry associations.

The primary measure is to increase visitor expenditure in South Australia to \$8.0b by 2020, as measured by Tourism Research Australia. The following table outlines the performance measures for this Plan. However it is recognised that new measures may need to be developed and for some aspects quantitative measures are not easily obtainable and alternative tools to review progress may need to be used.

There is considerable work to be done to drive the real changes needed to deliver on each Priority Action Area and implement the practical actions that are triggers for growth. This Plan outlines the framework for the whole State and guides a number of other core documents that will link operational actions and tasks to the strategic actions listed here.

Using the framework of this Plan, the following documents will be developed, reviewed or updated.

- SATC's Corporate Plan.
- Destination Action Plans (DAPs) in each of South Australia's tourism regions.
- Industry association and Regional Tourism Plans, including destination development plans.
- The business plans of individual operators as well as the many Plans of allied stakeholders such as Regional Development Australia and Local Government.



		Metric	Specific	Baseline Dec 2013 unless otherwise stated	2020 Potential	Priority Action Area
		\$8.0b potential by 2020	Reach the \$8.0b Tourism expenditure potential in SA by 2020	\$5.1b	\$8.0b	All Action Areas
C	Macro erspective	Inbound expenditure	Total inbound expenditure	\$727m	\$1.24b	Driving Demand
		Interstate expenditure	Total interstate expenditure	\$1.25b	\$2.13b	Driving Demand
		Intrastate expenditure	Total intrastate expenditure	\$1.24b	\$1.61b	Driving Demand
		Leisure events expenditure	Value of Leisure Events expenditure	\$261m	\$400m	Using Events to grow visitation
		Regional expenditure	Expenditure in SA outside of Adelaide	\$2.26b	\$3.55b	Driving Demand
	consumer erspective	Food and Wine	Association of SA with Food and Wine (Interstate)	49% 2nd to Victoria (51%)	Reach 1st place and grow to >51%	Driving Demand
		Interstate high yield consideration	Consideration of South Australia by High Yield travellers	40.3% April 2014	55%	Driving Demand
	Industry erspective	Maintain, then grow,	Interstate weekly seats into Adelaide	82,600	110,000	Supporting what we have
		air capacity	International weekly seats into Adelaide	14,500	>14,500	Supporting what we have
		Jobs	Number or people directly employed in the SA Tourism Industry	31,000 Jun 2013	41,000	Driving Demand
		Hotel Occupancy	Room occupancy of South Australian establishments	61.4% June 2013	65.3%	Supporting what we have
			Room occupancy of Adelaide establishments	71.9% June 2013	76.5% (Aus capital city avg)	Supporting what we have
		DAP signoffs	Destination Action Plans (DAPs) signed off and in place for Tourism Regions	100% of regions	100% of regions	Working better together



8. Acknowledgements

The South Australian Tourism Plan 2020 has been developed through extensive consultation with each of South Australia's regions and with stakeholders across industry, business and Government. It has also been developed using information and insights from Federal agencies such as Tourism Australia, Tourism Research Australia, and Austrade, as well as the SATC.

Together with gathering initial input from over 100 stakeholders through an online survey, almost 300 individuals were involved in more than 30 face to face consultations for the Plan, with forums conducted in all regions of South Australia, as well as with industry organisations, key operator groups, industry representatives and with a broad cross-section of relevant Government agencies.

The Draft Plan was subsequently developed, and comment again sought from stakeholders. Over 40 official submissions were received and integrated into the final text, before the publication of the *South Australian Tourism Plan 2020*.

Insights and the strategic framework were provided by BDA Marketing Planning. The workshops were primarily facilitated by Claire Ellis, principal of Claire Ellis Consulting, who also worked substantively on the final text of the Plan.

Consultation Summary



Flinders Ranges/ Outback

Limestone Coast

Murraylands

Yorke Peninsula

Kangaroo Island

Fleurieu Peninsula

Clare Valley

Barossa

Riverland

Adelaide Hills

Adelaide

Eyre Peninsula



South Australian Tourism Industry Council

Australian Tourism Export Council

Adelaide Airport

Festivals Adelaide

Australian Hotels Association

Adelaide Convention Bureau

Tourism & Transport

Adelaide CBD hotels International Airlines

Restaurant & Catering SA



Adelaide City Council

Regional Development Australia

Department of Environment, Water & Natural Resources (DEWNR)

Tourism Australia

Department of Manufacturing, Innovation, Trade & Energy (DMITRE)

Department of Planning, Transport and Infrastructure (DPTI)

Arts SA

Primary Industries and Regions SA (PIRSA)

Education Adelaide

Department of Further Education, Employment, Science and Technology (DFEEST)

SA Museum



9. Glossary

ABS - Australian Bureau of Statistics

ACB - Adelaide Convention Bureau

AHA – Australian Hotel Association

ATEC - Australian Tourism Export Council

CBD - Central Business District

ESA – Events South Australia (division of SATC)

HYES - High Yielding Experience Seekers

IVS - International Visitor Survey

LGA - Local Government Association

NVS - National Visitor Survey

RDA - Regional Development Australia

RTO - Regional Tourism Organisation

SATC - South Australian Tourism Commission

SATIC - South Australian Tourism Industry Council

SME - Small to Medium Enterprises

TRA - Tourism Research Australia

TTF - Tourism and Transport Forum

VFR - Visiting Friends and Relatives







