

An aerial photograph of a vast oyster farm in South Australia. The water is a clear, vibrant blue, and the oyster racks are arranged in neat, parallel rows extending towards the horizon. In the foreground, a white boat with a canopy is navigating through the racks. The background shows a clear blue sky and distant, low mountains.

# THE SOUTH AUSTRALIAN VISITOR ECONOMY SECTOR PLAN 2030



FRONT COVER: PURE COFFIN BAY OYSTERS, EYRE PENINSULA  
THIS PAGE: IGA WARTA TOURS, FLINDERS RANGES & OUTBACK

This plan acknowledges and respects that all tourism activity and development takes place on lands traditionally owned by South Australia's Aboriginal peoples and encourages Aboriginal communities to be a part of the current and future success of the South Australian Visitor Economy.

PRODUCED BY THE SOUTH AUSTRALIAN TOURISM COMMISSION.  
[WWW.TOURISM.SA.GOV.AU](http://WWW.TOURISM.SA.GOV.AU)



# CONTENTS

MESSAGE FROM THE MINISTER	4
MESSAGE FROM THE CHAIR	5
THE SOUTH AUSTRALIAN VISITOR ECONOMY SECTOR PLAN: AT A GLANCE	6
THE APPEAL OF SOUTH AUSTRALIA	8
DEFINING THE VISITOR ECONOMY	10
THE STORY SO FAR	12
THE VISITOR TODAY	14
THE VISITOR IN 2030	17
THE 2030 AMBITION	18
THE SIX STRATEGIC PRIORITIES	20
1 - MARKETING	22
2 - EXPERIENCE & SUPPLY DEVELOPMENT	23
3 - COLLABORATION	24
4 - INDUSTRY CAPABILITY	25
5 - LEISURE & BUSINESS EVENTS	26
6 - PROMOTE THE VALUE OF TOURISM	27
ENABLERS OF THE VISITOR ECONOMY	28
ROLE OF KEY STAKEHOLDERS	30
ALIGNMENT WITH OTHER PLANS	33
MEASURING SUCCESS	34
ACKNOWLEDGMENTS	39



## MESSAGE FROM THE MINISTER FOR TRADE, TOURISM AND INVESTMENT



There is huge potential for the tourism industry to grow and increase its contribution to the South Australian economy.

South Australia's Visitor Economy is a key economic pillar of the State, employing 36,000 people across 18,000 businesses, generating \$6.8 billion in visitor expenditure.

At some level, it touches us all.

South Australia offers stunning landscapes, world-class food and beverages, immersive experiences and experiential accommodation. Adelaide offers the sophistication of a global city, while maintaining an ease of access that is the envy of more congested cities. Our regions offer a wealth of memorable experiences from swimming with sea-lions to world-class dining to innovative events and festivals.

We need to play to our strengths. That means we need a clear and consistent vision which is created and owned by both industry and the South Australian community. This document provides the basis of this vision. It is drawn from extensive consultation across the Visitor Economy taking into consideration local knowledge and priorities. It articulates the range of strategic activities that are required to keep moving this industry forward.

The South Australian Government is committed to growing our State's economy. This Plan is part of the broader Growth Agenda which seeks to drive rapid growth across key industry sectors. It communicates our vision for the tourism sector and demonstrates our commitment to an industry that continues to make a significant contribution to the success of South Australia.

**HON DAVID RIDGWAY MLC**

MINISTER FOR TRADE, TOURISM AND INVESTMENT



## MESSAGE FROM THE CHAIR OF THE SATC BOARD



The South Australian Tourism Commission (SATC) has taken a leadership role in the development of this strategy, but this strategy is bigger than the SATC. It is a strategy for the entire Visitor Economy and is drawn from extensive consultation across the industry.

The vision and actions outlined in this strategy become the foundation for the SATC Corporate Plan, which details the activities and goals of the agency. This strategy can also form the basis of plans within the industry and provide key direction for relevant stakeholders. In this way, it provides the basis for a consistent, powerful and aligned vision which will drive the Visitor Economy forward.

The 2020 South Australian Tourism Plan demonstrated what could be achieved when there was an underpinning strategy. Under that plan we saw the contribution from the Visitor Economy Sector grow from \$5.1b to \$6.8b. This 2030 Visitor Economy Sector Plan will push the industry towards contributing \$12.8b by 2030.

The Plan outlines a series of pillars as the focus of industry development. These include marketing, experience and supply development, collaboration, industry capability, leisure and business events and promoting the value of tourism. It also highlights a series of enablers which require collaboration within government and across the State.

In fact, collaboration is at the heart of applying this strategy. The South Australian Tourism Commission and its Board has strongly endorsed the consultative approach taken and the strategy that has resulted. We look forward to contributing to the collaboration, both within the industry and among stakeholders, that will be the key to success. We have pulled together to develop this strategy. We look forward to seeing the application of the common vision culminate in an aligned effort that will maximise the value of the Visitor Economy for South Australia.

**ANDREW BULLOCK**

CHAIR, SOUTH AUSTRALIAN TOURISM COMMISSION

# THE SOUTH AUSTRALIAN VISITOR ECONOMY SECTOR PLAN

## AT A GLANCE

South Australia has a vibrant and growing Visitor Economy and the sector continues to perform strongly, outpacing the overall South Australian economy by more than double over the period from 2013 to 2018. Employment in the sector has also surged, with jobs rising by 5,000 over the same period, 2,000 of these in our regions. This success has been underpinned by a clear and consistent strategy driven by strong industry engagement. This Plan seeks to continue this success.

The SA Visitor Economy Sector Plan (the Plan) seeks to continue this strong momentum and unprecedented growth for the next decade and sets a bold ambition of growing the Visitor Economy yet further to \$12.8b by 2030, generating an additional 16,000 jobs in South Australia. This will result in significant, long term impacts upon the South Australian economy, driving wealth creation, investment and a well-deserved sense of pride in our State.

This Plan has been developed with the generous input of 700 people from across South Australia, with workshops held in 16 locations throughout the State and 19 meetings with various industry and government associations. This extensive consultation has yielded a Sector Plan that is truly a reflection of the needs of industry and acknowledges the opportunities and challenges of achieving the ambitious target of \$12.8b by 2030.

Visitor Expenditure in South Australia was \$6.8b in the year to December 2018. This represents substantial growth towards the then ambitious target of \$8.0b by December 2020, set in the previous South Australian Tourism Plan. Growth has been achieved for many reasons, particularly:

- Strong and effective investments in domestic & international marketing;
- Growth of inbound aviation capacity;
- Development of new experiences;
- Strong collaboration & alignment between industry & government; and
- Vibrant leisure & business events industry.



### THE SIX STRATEGIC PRIORITIES:



**MARKETING**



**EXPERIENCE & SUPPLY DEVELOPMENT**



**COLLABORATION**



**INDUSTRY CAPABILITY**



**LEISURE & BUSINESS EVENTS**



**PROMOTING THE VALUE OF TOURISM**

These priorities are ranked based on voting by all participants of the public industry workshops, and the input received through various surveys and meetings. Marketing was identified as the most important driver of achieving the full potential of our sector and the industry made a clear call for ongoing investment in this space. This in turn allows industry to leverage and amplify these messages.

In addition, several areas with critical enabling roles for the Visitor Economy were also identified:

- Public Infrastructure
- Labour & Skills
- Streamlining Regulation

This Plan sets out the key actions required, and quantifies the growth needed in each tourism region and by each market to achieve our potential.

# THE APPEAL OF SOUTH AUSTRALIA

South Australia is bursting with culture, wildlife encounters, exceptional food and wine, events and entertainment. Visitors can taste their way through world-famous wine regions only minutes away from Adelaide, soak up the sun at picture-perfect beaches, get up-close and personal with sea lions, dolphins, koalas and kangaroos, join the party at our immersive festivals and events or spend the night exploring world-class theatre and a thriving restaurant and bar scene.

Driving growth in visitation requires the promotion and development of visitor experiences that capitalise on these strengths, with different levels of focus needed for each of our audiences. For example, international visitors have very different visitation desires and needs compared to interstate and intrastate travellers.

## **EXCEPTIONAL FOOD & DRINK EXPERIENCES**

South Australia has a well-deserved reputation for delivering the best food and drink experiences across the country, driven particularly by the world-class wines produced in our State. Consumer research shows that South Australia leads the nation for both "good food and wine" as well as "credible wineries and wine regions". This is critically important as research shows these themes are the strongest driver of destination selection for the interstate audience, and second strongest thematic driver for international audiences.

## **IMMERSIVE NATURE & WILDLIFE EXPERIENCES**

South Australia is full of unique natural experiences, from holding a koala, hand feeding kangaroos and cage diving with great white sharks to enjoying our stunning coastal, outback and river landscapes. Experiences such as these are the strongest thematic driver of international visitation and also play a key role in driving interstate visitors to South Australia.



## EVENTS & FESTIVALS

Events and festivals are an area of strength for South Australia, built up over many decades of consistently delivering quality, appealing experiences. Our events showcase our passion for arts and culture, live music, and sport. This is reflected in the research that shows 30% of our interstate audience associate “festivals” with South Australia and constitutes an area of genuine strength for the State.

## OTHER DRIVERS

These core drivers are supported by secondary appealing elements which drive interest in our State and ultimately, visitation.

Road trips are designated routes encompassing multiple experiences, landscapes, views and accommodation options. Such trips are very popular, especially for long staying visitors interested in caravan and camping, family holidays and the intrastate market. They are a great way for visitors to experience many different regions of our State and disperse widely.

Our history and heritage as well as Aboriginal experiences have a role to play. Both areas are distinctly different and have significant assets in South Australia, such as built and natural heritage across the State and the State’s globally significant collection of Aboriginal artefacts. Integrating these experiences with other themes will further increase appeal. Examples include dining in repurposed heritage buildings or wildlife and nature encounters from an Aboriginal perspective.



## DEFINING THE VISITOR ECONOMY

**T**he Visitor Economy is a significant industry in South Australia and has been growing rapidly. While many will immediately think of leisure tourism when they hear Visitor Economy, it is important to understand that it encompasses so much more than the traditional tourism categories of hotels, tours and airlines. The Visitor Economy is all spend associated with visitors to South Australian destinations.

### **WHO ARE 'VISITORS'?**

A visitor is anyone who travels a significant distance from their home for the purpose of a holiday, to visit friends or relatives (VFR), for business, for events, for education or for employment (providing it isn't their normal daily commute). In the 12 months to December 2018 there were over 7 million overnight visits in our State and almost 14 million domestic day trips.

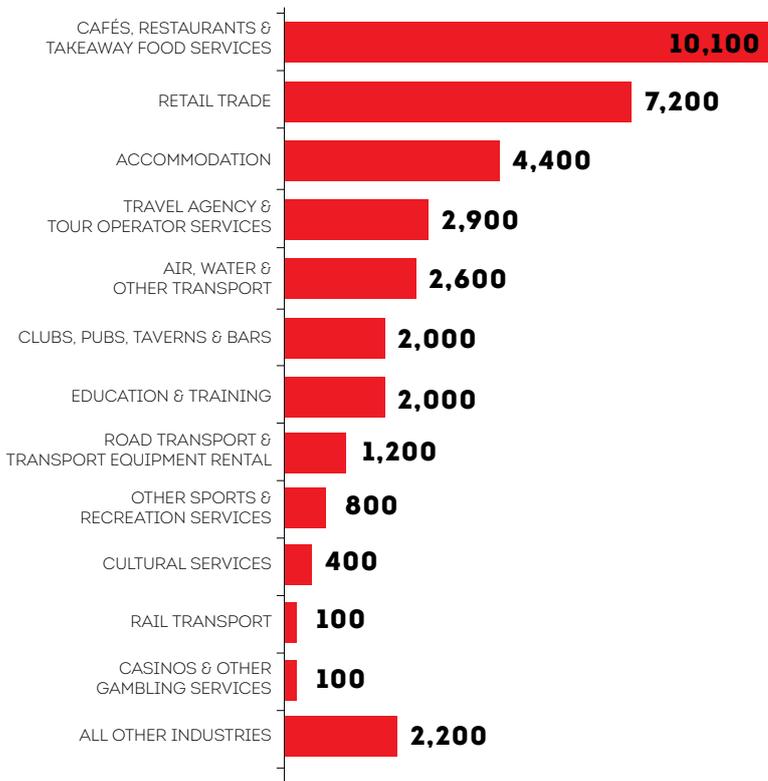
### **WHAT IS THEIR IMPACT?**

The expenditure associated with these trips is significant, and growing, covering a wide range of industries and enabling 36,000 South Australians to be directly employed in the Visitor Economy. The rate of employment in this industry is just below that of the more traditional agriculture, forestry and fishing sector and four times that of the mining sector.

While restaurants, tour services and accommodation are among the largest employers, they represent only half of all the jobs, demonstrating the breadth of the Visitor Economy in South Australia.



### DIRECT JOBS IN THE VISITOR ECONOMY



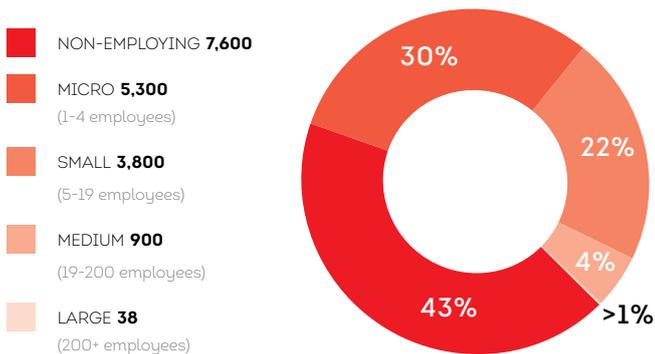
These Visitor Economy jobs have grown by 5,000 since 2013, making the sector one of the fastest growing in the State. Significantly, 2,000 of these direct jobs were created in regional South Australia.

All this is just the direct impact of the Visitor Economy. Due to all of the economic activity outlined previously, flow on impacts employ an additional 20,000 South Australians indirectly. These include:

- Farmers, fishermen and winemakers who produce South Australia’s great food and wine that is consumed by visitors.
- Construction workers and architects who build visitor infrastructure, in the form of hotels, stadiums, restaurants and retail spaces.
- Professional services provided to the businesses in the Visitor Economy, such as accountants, lawyers and information technology specialists.

This substantial workforce is predominantly employed within small businesses. There are 18,000 tourism businesses across South Australia for whom all or part of their workforces are dedicated to servicing the Visitor Economy. Almost 8,000 of these businesses are sole proprietorships or partnerships, such as small scale tour guides, accommodation providers, retailers and taxis. Among employing businesses, most have less than 20 staff.

### SMALL BUSINESS IN THE VISITOR ECONOMY





## THE STORY SO FAR

The Visitor Economy is a super growth sector and is now a key contributor to the economic prosperity of our State. Since the development of the previous South Australian Tourism Plan in 2013, the South Australian Visitor Economy has grown 2.5 times faster than the overall economy.

On the back of expenditure growth in the Visitor Economy, jobs have likewise surged, up 15% for the sector, while overall employment in South Australia grew by 1%.

### THE SOUTH AUSTRALIAN VISITOR ECONOMY: 2013-2018



**+\$1.6B**  
**VISITOR**  
**EXPENDITURE**



**+5,000 ADDITIONAL**  
**JOBS IN SA INCLUDING**  
**+2,000 EXTRA JOBS**  
**IN REGIONS**



**+5,000 DIRECT**  
**INTERNATIONAL**  
**AIRLINE SEATS P/W**



**+1,300**  
**NEW HOTEL**  
**ROOMS**

\*Growth from December 2013 to June 2018.

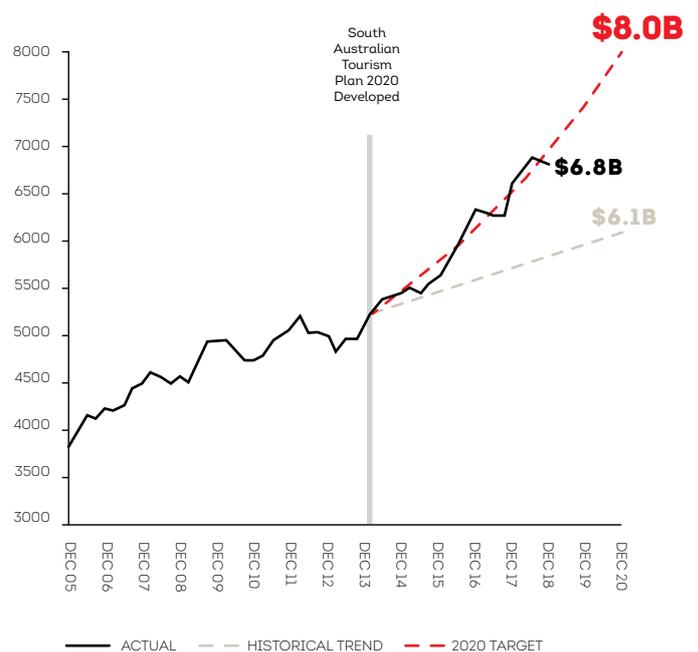


At the core of the previous South Australian Tourism Plan, was setting the ambitious target of \$8.0b by December 2020. Since 2013 when the Plan was set, there have been strong, consistent and strategic efforts to invest in the areas we know will make the most significant difference. These include domestic and international marketing, increasing inbound aviation and driving leisure and business events.

With current visitor expenditure at \$6.8b in the 12 months to December 2018, the South Australian Visitor Economy is on track to achieve the ambition of \$8.0b by December 2020. This will require the continuation of the unprecedented growth experienced since 2013.

This is well ahead of the \$6.1b that would have been expected to be achieved by 2020 based on the historical trend projection.

### HISTORICAL PERFORMANCE IN THE SOUTH AUSTRALIAN VISITOR ECONOMY



Source: Tourism Research Australia (International Visitor Survey and National Visitor Survey December 2018) and 2020 modelling

# THE VISITOR TODAY



There are currently four key markets within the South Australian Visitor Economy, and each of them are important. While they are of comparable size, the behaviours, itineraries, booking patterns and, importantly, expenditure per visitor, are vastly different.

## **INTERNATIONAL VISITORS**

International visitors are long staying, high spending visitors. They are a diverse market comprising visitors from both the Eastern and Western hemispheres staying in South Australia for a wide variety of reasons, including education. They are likely to have a low awareness of the experiences South Australia has to offer.

## **INTERSTATE OVERNIGHT VISITORS**

Interstate overnight visitors are average spending visitors. The key markets are from Victoria and New South Wales and they have a moderate understanding of the South Australian experiences that are available, but many notions are likely to be out of date or inaccurate.

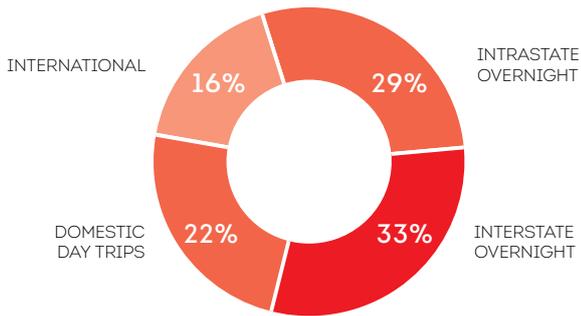
## **INTRASTATE OVERNIGHT VISITORS**

Intrastate overnight visitors are South Australians travelling within their own State. These are lower spending visitors on shorter itineraries, often to familiar destinations. They feel they have a solid understanding of South Australia and its attractions. Their booking lead times tend to be short.

## **DOMESTIC DAY TRIP VISITORS**

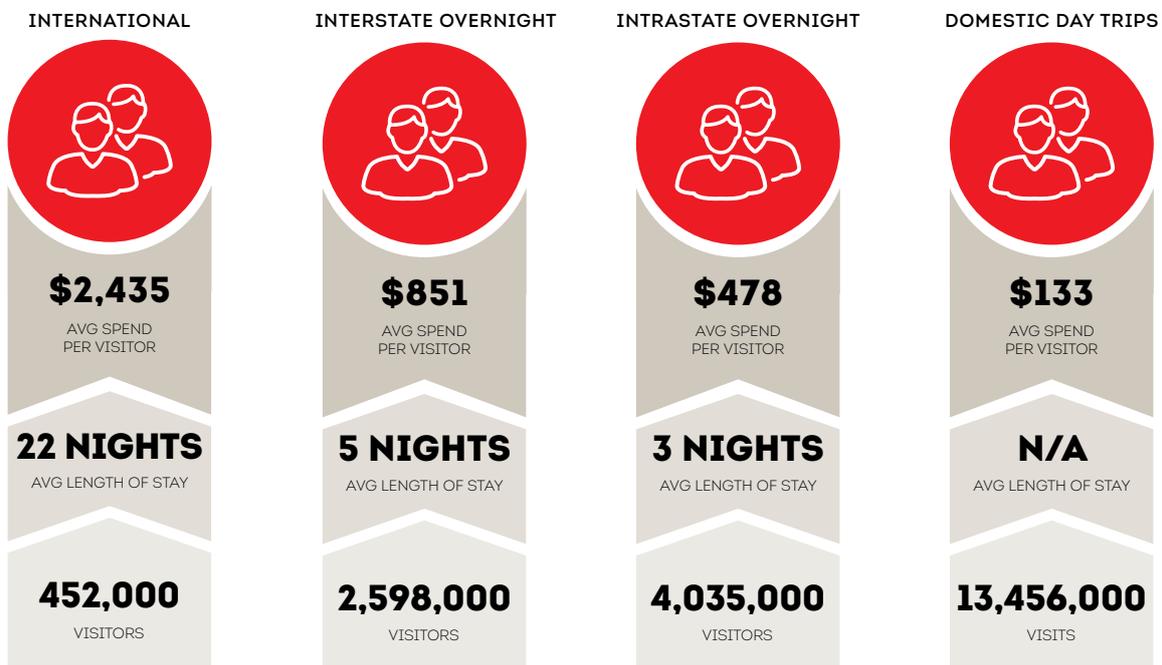
Domestic day trip visitors are Australians who are away from their homes for more than 4 hours, but do not stay overnight. While this includes some interstate travel (largely business purpose), day trips are predominantly leisure trips to nearby locations. While the yield is small, there are almost 14 million of these trips every year and their overall contribution is significant, especially to tourism regions bordering Adelaide.

## EXPENDITURE BY VISITOR ORIGIN



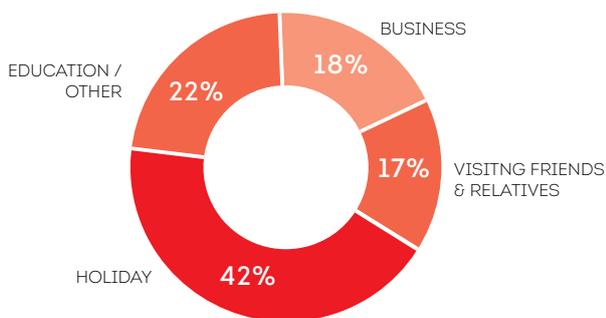
Source: Tourism Research Australia (IVS/NVS Dec 2018)

## DIFFERENCES IN VISITOR BEHAVIOUR BY ORIGIN



Source: Tourism Research Australia (IVS/NVS Dec 2018)

## EXPENDITURE BY PURPOSE OF VISIT



Source: Tourism Research Australia (IVS/NVS Dec 2018 - latest available for Purpose of Visit)

## PURPOSE OF VISIT

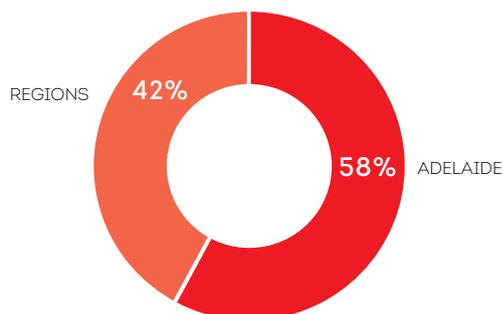
While the largest category within the Visitor Economy is holiday purpose visitors, the Visitor Economy is far broader and also encapsulates visiting friends and relatives (VFR), business and education purpose visitors. Although the purpose of visit will largely define the duration of the trip, infrastructure used, accommodation options and budget, there are some commonalities across all sectors. For example, having a highly appealing destination will influence all purposes of visitor, even business purpose visitors who may elect to include leisure activities as part of their trip.

Education purpose visitors, which includes secondary, tertiary and vocational students who are in South Australia for less than 12 months, plays a very significant part in driving international expenditure.



### THE IMPORTANCE OF REGIONS

South Australia’s tourism regions each have distinct product offerings and appeal factors to their respective markets. The majority of spend is concentrated in Adelaide, driven by the substantial population base, the airport and various key assets such as hotels, the Adelaide Convention Centre and Adelaide Oval. However, collectively, expenditure in regional South Australia is significant, representing 42 cents in every dollar spent in the State. Consumer research tells us that itineraries involving both Adelaide and regional areas are of higher appeal to visitors due to the complementary product propositions.



Source: Tourism Research Australia (IVS/NVS Dec 2018)

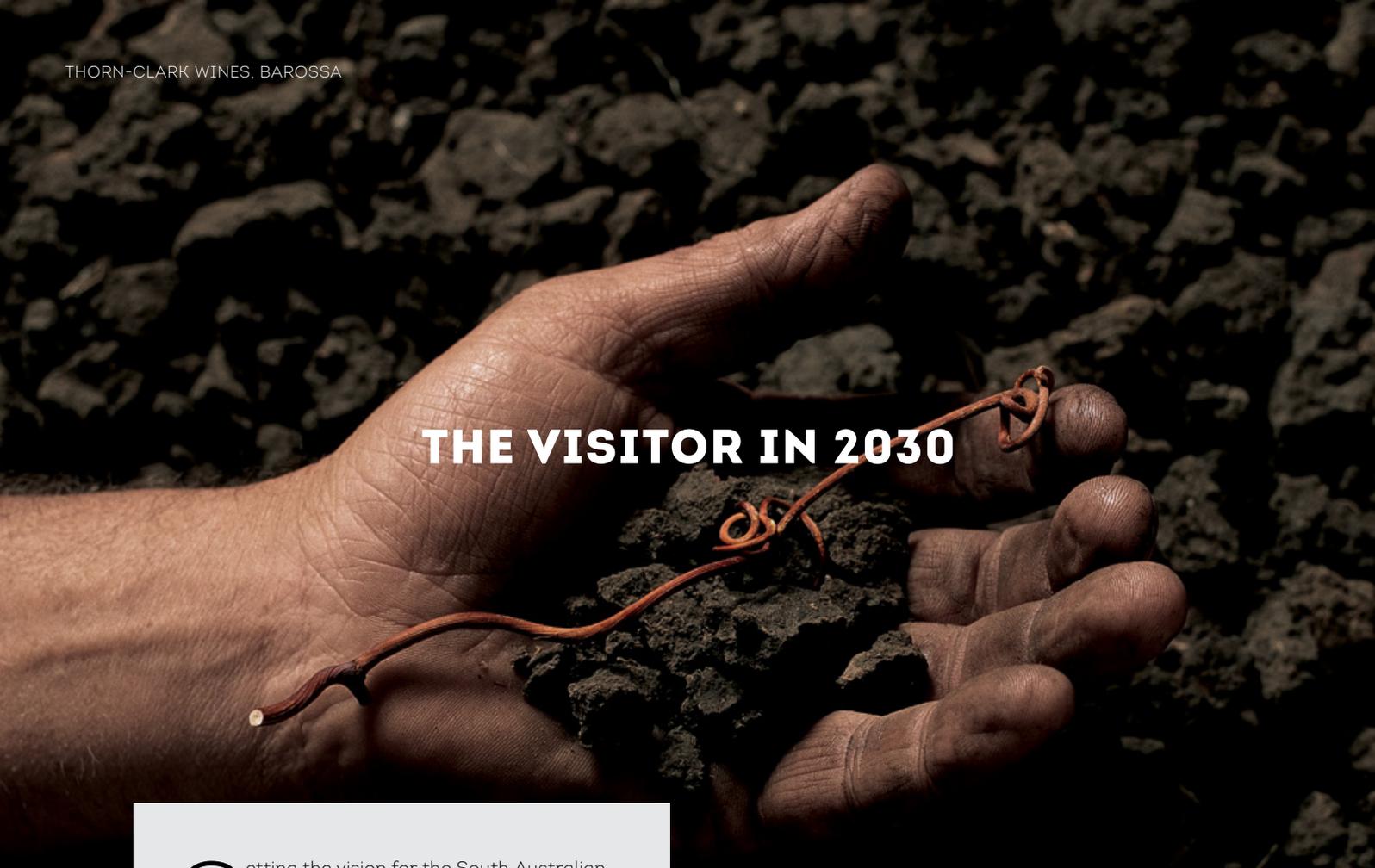
The South Australian Visitor Economy Sector Plan 2030 relates to the entire State of South Australia. Discussion of region-specific travel trends and required actions are outlined in the companion document the Regional Visitor Strategy, which was launched in 2018.

### TOURISM REGION

### DEC 2018

Adelaide Hills	\$172m
Barossa	\$213m
Clare Valley	\$89m
Eyre Peninsula	\$310m
Fleurieu Peninsula	\$460m
Flinders Ranges & Outback	\$462m
Kangaroo Island	\$126m
Limestone Coast	\$340m
Murray River, Lakes & Coorong	\$148m
Riverland	\$176m
Yorke Peninsula	\$205m

Source: Tourism Research Australia (IVS/NVS Dec 2018) 3 year average.



## THE VISITOR IN 2030

Setting the vision for the South Australian Visitor Economy through to 2030 requires consideration of the significant changes to consumer behaviour including travel inspiration, planning, booking, the actual experience and the eventual sharing of the trip.

### **GROWTH IN EASTERN MARKETS**

While we expect growth from traditional western markets, it is anticipated that expansion will continue to be strongest from the Eastern Hemisphere, including China. Continued growth in the demand for international education is expected, with the Eastern Hemisphere continuing to be the largest source market.

### **SHORTER STAYS**

Across all markets the trend towards shorter average length of stay is likely to continue. International visitation will reflect a changing profile towards the eastern markets which tend to shorter stays, but with a higher spend.

### **MORE SPONTANEOUS**

The expectation for 'On Demand' services will only increase through to 2030. Expectations of travellers for personalised, high quality experiences with short lead times will represent both an opportunity and a challenge for tourism businesses, particularly regarding opening hours, seasonal operations and the availability of skilled labour.

### **OLDER**

With Australia's aging population, the Baby Boomer generation will continue its insatiable thirst for travel experiences. The typical visitor in 2030 is likely to be, on average, older than those of today.

### **MORE DIVERSE**

Our visitor mix, both domestically and internationally, will continue to diversify. Defining a 'typical visitor' will become increasingly challenging, with a more ethnically diverse visitor mix demanding a range of appropriate visitor experiences.

### **MORE CONNECTED**

A decade is a long time in the digital economy. It is impossible to predict the direction that technology will take us in the next decade, but we do know it will be disruptive and present new opportunities and challenges. Visitors from across the globe will bring with them expectations of tourism businesses embracing the new technologies and digital platforms that emerge.

The Visitor Economy in 2030 will look vastly different to today, but much of the core proposition for travel will remain the same. Travellers will still be seeking out high quality immersive or relaxing experiences with friendly customer service that represents good value for their tourism dollar. Core draw-cards for South Australia are likely to remain our established strengths across key areas such as food and wine, nature-based tourism and cultural experiences.

# THE 2030 AMBITION

To grow the Visitor Economy through to 2030, we need to be bold and ambitious. Several growth scenarios have been developed.

## THE HISTORICAL TREND: \$10.8B

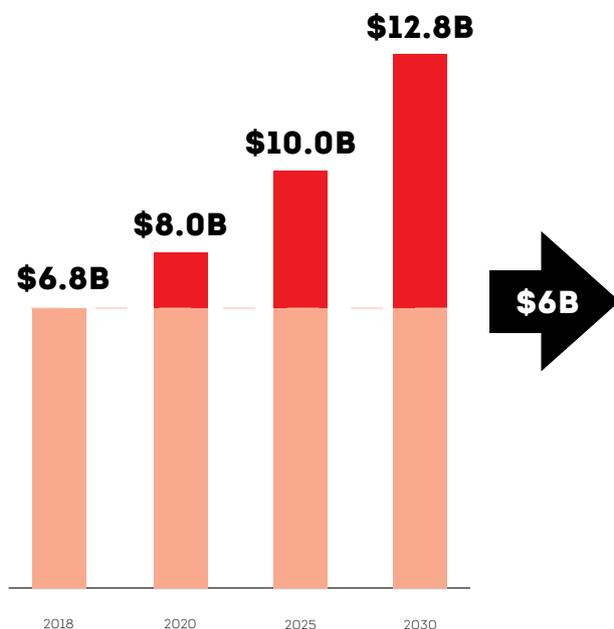
Taking the growth achieved over the previous decade and projecting forward to 2030 will see the Visitor Economy in South Australia reaching \$10.8b. This considers both the unprecedented growth experienced leading up to 2019, as well as the challenging years around the Global Financial Crisis. The waypoints for this scenario are \$7.4b by 2020 and \$9.0b by 2025.

## THE BOLD AMBITION: \$12.8B

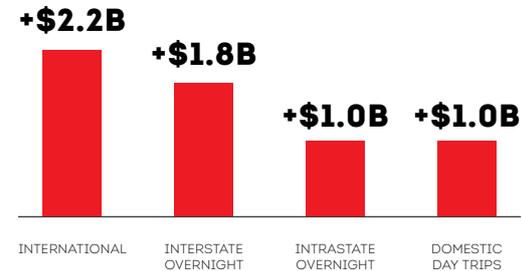
Using visitor projections provided by Tourism Research Australia and overlaying these onto the South Australian Visitor Economy, an ambitious target has been set, well in excess of the historical trend, with the aim of reaching \$12.8b by 2030. This preserves the previous target of \$8.0b by December 2020 and seeks to achieve \$10.0b by 2025 before surging on to the final goal of \$12.8b. This is an ambitious target and requires a strong commitment by a range of stakeholders, including direct ongoing government investment.

Within this model, we propose that each of South Australia's origin markets should be targeted to grow faster than they otherwise would have. The most aspiration is placed on our international markets, with more moderate ambition on our interstate overnight markets. Growth from local South Australian source markets is also required to reach the target.

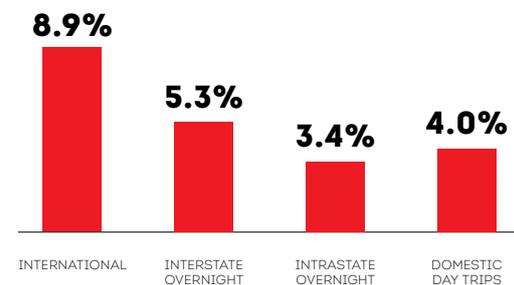
### OUR GOAL



### WHAT WILL GROW?



### HOW FAST WILL IT GROW?





### **ONGOING REGIONAL AMBITION**

This framework highlights the importance of regional expenditure through to 2030 and the critical importance of growing the Visitor Economies of regional South Australia at their maximum rate.

In the year to December 2018, \$2.8b of visitor expenditure was spent in regional South Australia. Tourism forecasts conducted by Tourism Research Australia indicate that visitor trends over the next 10 years will drive growth faster in Adelaide than in the regions. However, growth targets for regions in this plan are ambitious, with a growth rate at around 20% higher than that set for Adelaide. This reflects the strong commitment of industry and government to grow our regions and relies on strong leveraging of the unique experiences these areas offer.

This results in an ambitious goal for regions to grow to \$5.1b by 2030, requiring strong and consistent application of the strategies outlined in this plan by all key stakeholders. This goal is all the more challenging as many of the prevailing trends as outlined previously will favour urban travel, including increased visitation from the Eastern Hemisphere and shorter lengths of stay.

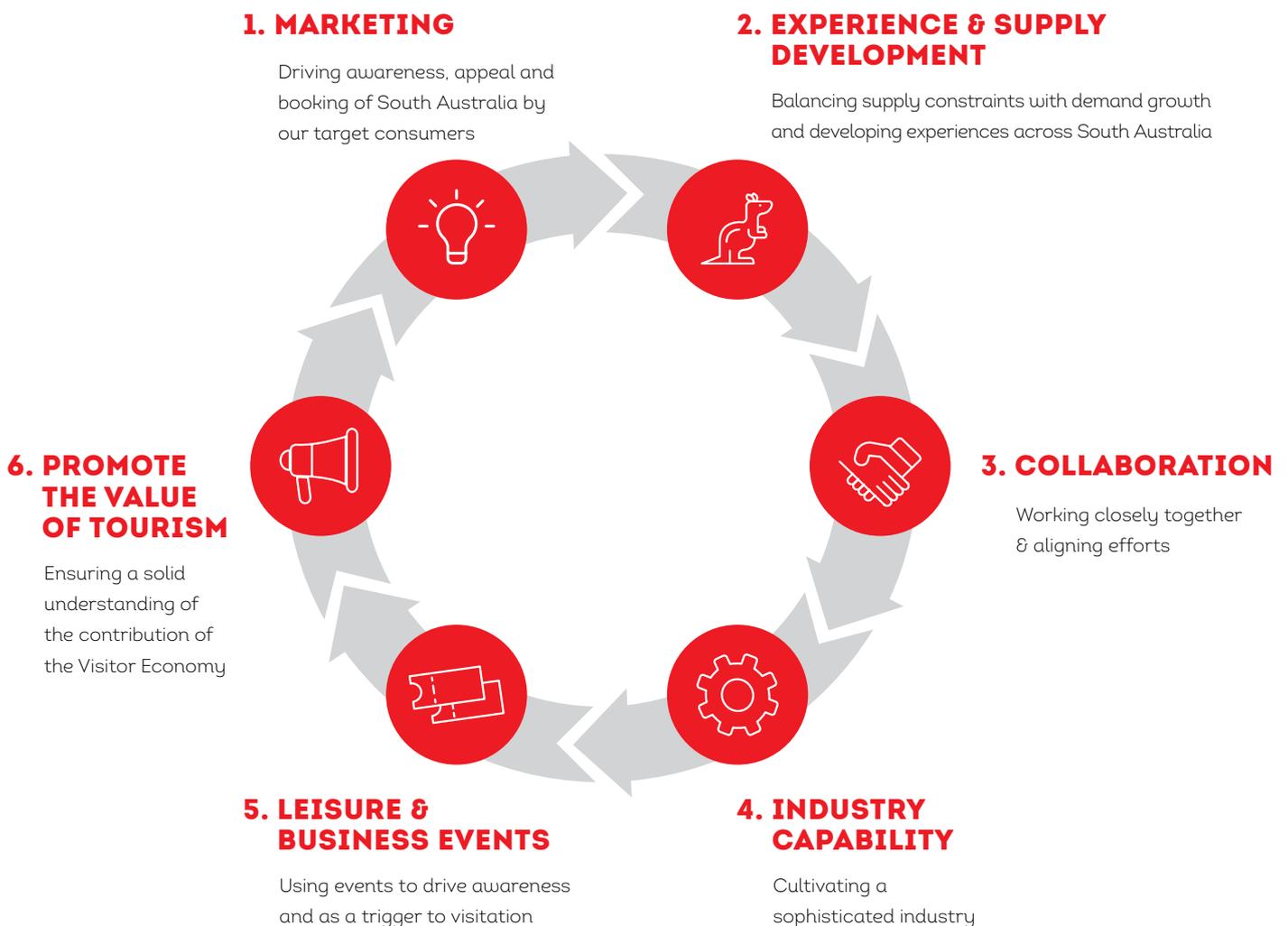
Specific regional targets are provided at the end of this document.

# THE SIX STRATEGIC PRIORITIES



Achieving the bold ambition of \$12.8b in visitor expenditure in South Australia by December 2030 will require substantial growth from across the Visitor Economy. Through the extensive consultation process the six most essential priorities were identified.

This acknowledges that focussed effort is required and that some prioritising of resources to the areas where most benefit will be realised is essential to success.





## 1. MARKETING

### WHY ACTION IS REQUIRED

Communicating the proposition that South Australia has to offer is a key requirement of growing the Visitor Economy. Consumer research tells us that South Australia has highly appealing experiences, but that relatively low awareness of these experiences is holding back growth.

A strong focus on marketing and driving consumer demand was the most consistent theme to emerge from the industry consultation sessions, especially in light of the significant effects of government promotional efforts in recent years.

Direct government investment in promoting South Australia, commensurate with the size and growth potential of the industry is essential. Industry identified the uncertainty around this ongoing investment as a critical risk to the achievement of the full \$12.8b potential. This is especially true due to the flow-on and partnership benefits which allow industry to amplify these messages through individual campaigns of South Australian Visitor Economy businesses. In turn, this increased consumer demand will drive private sector investment in infrastructure and experiences.

The primary target market for South Australia remains the High-Yielding Experience Seeker across our international and interstate markets. These travellers are passionate and curious about the world, are open to immersive experiences and have a higher than average spend on their trip.

They will vary in their travel habits and experience selection depending on where they are from and it is key that consumer insights lead campaign development. What works in the interstate market is unlikely to be as effective in Beijing or London.

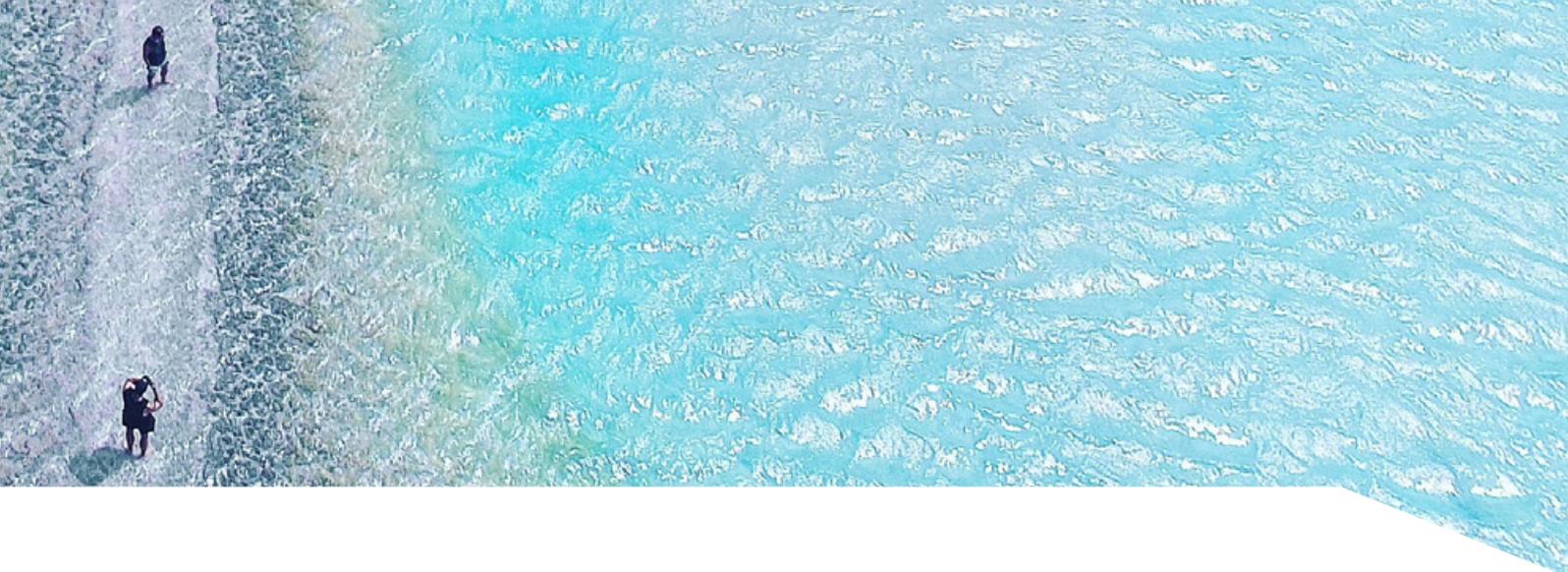
Intrastate, which currently represents half of visitor expenditure, is a more loosely defined target market as it requires all South Australians to engage with their own state and the barriers to visitation are far lower.

Secondary market segments should also be considered and developed, including families, grey nomads, backpackers and international students. These secondary markets have a key role in driving dollars deep into the Visitor Economy, particularly in regional areas, as well as driving demand during low and shoulder seasons.

Consistent and effective promotion of South Australia is essential to ensure the full potential of the State is realised, focusing on South Australia's drivers of visitation, as outlined earlier in this Plan. This will be achieved through a range of methods, including traditional media, social and digital platforms as well as emerging marketing platforms that will be developed over the coming decade. Regardless of the medium, the objective remains the same; to communicate the best of South Australia to the most profitable potential audience.

### HOW WE WILL GET THERE

- ▶ Effectively target high-yielding travellers to ensure sustainable growth maximising expenditure outcomes.
- ▶ 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.
- ▶ Maximise dispersal and expenditure by providing and promoting compelling itineraries.
- ▶ Consider emerging platforms and new methods of communicating and engaging with the consumer.
- ▶ Encourage visitors to promote and advocate for South Australia through social media and word of mouth.
- ▶ Align product promotion with product development, ensuring delivery of the strong marketing promise.
- ▶ Base channel selection and messaging on a strong understanding of the consumer, driven by reliable market insights and research.



## 2. EXPERIENCE & SUPPLY DEVELOPMENT

### WHY ACTION IS REQUIRED

South Australia has a compelling proposition, offering a wide range of tourism assets, especially in the areas of food, wine, nature-based, Aboriginal and cultural tourism. However, in many regions of the State there is a great opportunity to further develop these assets into outstanding tourism experiences. “Hero Experiences” that offer unique, world-class, highly appealing visitor experiences have a transformative effect on the surrounding area, pulling in high value visitors who are more engaged with the destination, extending length of stay and increasing overall yield. There are several such opportunities currently awaiting development, such as the old Royal Adelaide Hospital / Lot 14 precinct in Adelaide.

Experience development also includes the ongoing improvements to South Australia’s accommodation supply. South Australia falls behind our competitor states in quality accommodation options, and in being able to cater to larger groups.

This is a particular challenge in our regions where travellers are increasingly expecting accommodation to include a strong experiential component. It is essential that accommodation operators deliver superior service and unique value-adds.

Connectivity between experiences to create clusters is also a priority. Experience clusters that can be woven into itineraries must be developed to further drive expenditure and additional nights across South Australia.

Accessibility considerations must also be taken into account, ensuring that these products and experiences are accessible to all people, regardless of their physical limitations, disabilities or age.

A critical aspect of overall development of the Visitor Economy in South Australia is ensuring our State is easily accessible to interstate and international visitors. Direct air access is increasingly important to service the trends towards shorter, more intense holiday itineraries. Growth in air access requires both increases in currently serviced routes as well as developing new routes for key markets.

### HOW WE WILL GET THERE

- ▶ Support the development of unique and appealing experiences that are focussed on South Australia’s strengths.
- ▶ Leverage opportunities provided by the State’s natural assets on both public and private land and encourage tourism engagement through the development of compelling experiences.
- ▶ Develop linkages between experiences to create clusters.
- ▶ Upgrade and refresh quality of accommodation across South Australia to match consumer expectations and create immersive experiential accommodation options.
- ▶ Increase aviation access to, and within, South Australia through increased domestic and international capacity, directly to Adelaide and regional airports.



### 3. COLLABORATION

#### WHY ACTION IS REQUIRED

Collaboration has been crucial to driving the success achieved in recent years in achieving the full potential of the Visitor Economy. This must continue.

There are many levels at which working together can benefit the Visitor Economy. Collaboration within the industry is critical to best leverage learnings and capability building. Between industry and government, it can create an environment that is maximised for investment. Additionally, working across government entities of all levels will ensure a positive policy environment for the industry.

It is critical that complementary experiences are well integrated to allow for a seamless customer experience. Furthermore, cross-promotion of experiences allows for a higher level of visitor satisfaction and will drive increased yield.

This is a challenging task. True collaboration requires dedicated effort and a proactive approach, focusing on the broader, long term benefits that will be realised by working together.

There are several essential areas of partnership to be maintained, including between:

- Individual Tourism Operators;
- Regional Tourism Organisations;
- Various industry organisations, including the Tourism Industry Council of South Australia (TICSA);
- The South Australian Tourism Commission and Tourism Australia;
- A range of government departments including Environment and Water, Primary Industries, Regions, Planning, Transport and Infrastructure, Arts and Treasury;
- Major events and festivals;
- The Adelaide Convention Centre and the Adelaide Convention Bureau;
- Regional Development Australia, local councils and the Local Government Association;
- Educational institutions including universities and vocational training centres; and
- Other Australian states and territories.

It is important that cooperation is applied across the Visitor Economy, including within and across regions.

#### HOW WE WILL GET THERE

- ▶ Foster regular and constructive partnering between operators, key industry bodies and government.
- ▶ Ensure South Australia continues to be well represented in Tourism Australia campaigns, especially internationally.
- ▶ Facilitate cross-government cooperation to create a positive environment for investment in the Visitor Economy.
- ▶ Encourage and create opportunities for cross-promotion within regions linking experiences and providing recommendations to maximise visitor engagement.
- ▶ Facilitate cross-regional collaboration to ensure learnings from each region can be leveraged across regions.
- ▶ Work with other states to maximise tourism opportunities.
- ▶ Facilitate engagement across private and public sectors to identify investment opportunities and attract private investment into South Australia.
- ▶ Drive growth by optimising the experience of international students and their families in South Australia through partnerships with educational institutions.



## 4. INDUSTRY CAPABILITY

### WHY ACTION IS REQUIRED

Underpinning all the actions outlined in this Plan are the businesses within the Visitor Economy that deliver or facilitate the experiences on the front-line. It is essential that there is a high level of capability to ensure both business sustainability and high-quality experience and service. As outlined earlier in this Plan, the vast majority of tourism business are micro or small businesses. This restricts their capacity to engage with internal training, development and review compared to larger enterprises. Additionally, the geographical diversity of the sector increases the difficulty in addressing these challenges.

Through consultation, it was identified that industry requires ongoing development in a broad range of areas, including:

- Ongoing business training;
- Digital skills enhancement;
- Customer service standards;
- Tailoring experiences to emerging markets;
- Encouraging entrepreneurship;
- Professionalisation of business delivery;
- Development and availability of commissionable product; and
- Availability of quality consumer research to underpin operational and investment decisions.

Business capability can be enhanced through training, award programs and accreditation systems. Engagement with

such programs requires significant additional resources to be committed by operators into business planning, attending training, improving systems as well as initiating and maintaining new practices. Keeping abreast of emerging technology and evolving expectations is challenging and operators require support to prioritise the development of their businesses.

It is also important that quality improvement be driven in areas that don't typically consider themselves to be a part of the Visitor Economy, such as petrol stations, supermarkets, small town retail and restaurants. These businesses are important, and their service delivery affects visitor satisfaction just as much as that of tour guides, accommodation staff and transport operators.

Driving improvements to industry capability falls within the remit of a range of organisations across the visitor economy as outlined in the 'Role of Key Stakeholders' section. While tourism businesses themselves are ultimately responsible for driving excellence within their organisations, there are a range of organisations that offer support in various ways, including the Tourism Industry Council of South Australia (TICSA), the Australian Tourism Export Council SA, Regional Tourism Organisations, the South Australian Tourism Commission, Regional Development Australia, the Department of Industry and Skills and the Local Government Association. In addition, a range of industry-specific sector associations are active in this space, including the Australian Hotels Association, Restaurant and Catering South Australia, the Taxi Council SA, Food SA and the South Australian Wine Industry Association, Festivals Adelaide and the Adelaide Convention Bureau.

### HOW WE WILL GET THERE

- ▶ Ensure Visitor Economy businesses have access to, and engage with, tools and technologies to maximise their professionalism and profitability.
- ▶ Ensure industry has access to strong training and development programs to assist in filling skill gaps.
- ▶ Ensure continued strong take up of listings on the Australian Tourism Data Warehouse (ATDW) with a focus on commissionable product.
- ▶ Drive entrepreneurial skills development and confidence to activate innovative ideas and businesses.
- ▶ Utilise accurate, relevant and concise research insights to inform business decisions.

## 5. LEISURE & BUSINESS EVENTS

### WHY ACTION IS REQUIRED

Events and festivals in Adelaide and regional South Australia are important drivers of visitation. While events have a different priority in each region, the role they play in creating triggers to convert a potential visit into an actual booking is well understood.

Events and festivals come in all shapes and sizes, from large scale signature events such as the Santos Tour Down Under, WOMADelaide, the Adelaide Fringe and the Adelaide Festival, to mass participation events such as the Masters Games and to smaller scale community events. One-off events in South Australia also have a strong impact on visitation, but to maximise their value to the Visitor Economy, these need to be unique propositions that will trigger interstate and international visitation to South Australia. Events occurring in low and shoulder seasons have a particularly important role in smoothing seasonality in the Visitor Economy.

Events are also a strategic marketing asset, showcasing the South Australian experience to a broader audience, both to participants, and through event media coverage.

Events are resource intensive activities. Sustainable management of both the financial and human resources, including volunteers, for each event is critical to their ongoing viability.

Due to these challenges and the passion inherent in staging an event, event organisers can tend to focus entirely on event delivery and allocate insufficient funds to the marketing and promotion of their event. This is a critically important component that is required to realise the growth potential from leisure events.

Business events, including conferences, exhibitions and incentives, also have a key role, particularly for Adelaide and adjacent regions. Pre and post touring of these high-spending visitors is a distinct opportunity. Business events also support other growing sectors of the South Australian economy, such as advanced manufacturing, the space industry and biomedical science.

### HOW WE WILL GET THERE

- ▶ Further develop South Australian major events, maximising their associated visitor expenditure.
- ▶ Attract investment and increased sponsorship into major events.
- ▶ Use business and leisure events to smooth seasonality.
- ▶ Maximise the opportunities that events and festivals offer to the local region, driving positive legacy impacts in cultural and social factors.
- ▶ Maximise the value of existing events through cross-promotion.
- ▶ Leverage major events and festivals to promote our state and tell the story of South Australia.



## 6. PROMOTE THE VALUE OF TOURISM

### WHY ACTION IS REQUIRED

Tourism, and the broader visitor economy, has a key role in driving real jobs and economic growth across South Australia. Recognition of the value that this industry contributes to South Australia is important in a variety of contexts.

At a grass roots level, it is essential that communities understand the jobs impact of visitors to their area and the role this plays in sustaining local businesses, services and population.

Community endorsement of the Visitor Economy will allow for a range of stakeholders, including local government, to invest with confidence. Seeing the potential and actual benefit of this industry also drives the within-region and across-region collaboration that is critical to success.

While much of the importance of promoting the value of our industry lies in unlocking the economic potential, there are several broader, non-economic outcomes from the Visitor Economy. These include contributions to arts, culture and State pride as well as legacy impacts through training and skill development.

Tourism also has a role in the protection of various built and natural heritage assets that are of high appeal to the visitor. A high profile for the Visitor Economy will also attract young people to pursue a career in the sector, driving new ideas, skills and enthusiasm that industry needs to achieve our ambitious goals.

These messages need to be conveyed regularly by a wide range of advocates, within both government and industry, to ensure a credible message is communicated to key decision makers and community members.

At a State level, a strong understanding of the significant economic impact of the Visitor Economy can facilitate prioritisation of tourism projects in government decision making to the benefit of South Australia.

### HOW WE WILL GET THERE

- ▶ Educate the community about the breadth of the Visitor Economy and the diversity of businesses that benefit.
- ▶ Promote the value of the Visitor Economy in plain, accessible language using evidence from highly credible data sources.
- ▶ Encourage locals and visitors to be ambassadors for the State.
- ▶ Provision of strong research to guide decisions.
- ▶ Build confidence and a positive environment for investment.
- ▶ Demonstrate the value of the Visitor Economy to complementary Government priorities such as population growth, exporting education and labour force development.

# ENABLERS OF THE VISITOR ECONOMY

In addition to the six strategic priorities, there are many other areas of critical importance to growing the Visitor Economy that are outside of the direct control of the various stakeholders. Nonetheless, these are important areas that require the assistance of diverse sections of the economy to enact. The business cases for much of the investment required will be underpinned by other sectors of the economy, such as mining or agriculture, with the Visitor Economy providing an additional boost.

These enablers fall under three broad categories. As with the strategic priorities, these are ranked in order of importance based on views expressed during the consultation.

## 1. PUBLIC INFRASTRUCTURE

The main areas of infrastructure need to remain consistent with those previously identified in the Regional Visitor Strategy and will be subject to future budget prioritisation and partnerships between State/Local Governments and the private sector.

### ACCESS INFRASTRUCTURE

It is essential that our tourism experiences are easily accessible. Quality of road infrastructure to support the growing drive market is important, ensuring that South Australia is accessible from all areas of the country.

Maintenance and development of hiking and cycle trail infrastructure to support nature-based tourism is also important. Aviation development, as outlined in "Experience and Supply Development", must be supported with the required airside infrastructure, including at regional airports.

### SIGNAGE

Inspirational as well as wayfinding signage is important to ensure a quality visitor experience in South Australia. Signage has long been a challenging area due to the wide range of stakeholders involved, geographically large areas of coverage and the requirement for ongoing maintenance. While there has been some recent success in deploying touring route signage across much of South Australia, a more comprehensive approach to signage is required.

### TELECOMMUNICATIONS

There are challenges with telecommunications accessibility in many tourism regions, even those in close proximity to Adelaide. As use of smartphones and mobile data is now common across visitors to South Australia, this is a significant concern, impacting safety, as well as limiting the role of social media sharing, last minute research and the use of digital maps. New applications for internet connectivity are constantly being developed. Without consistent and reliable coverage across the State our ability to take advantage of emerging opportunities is limited.



In addition to this, tourism operators require solid telecommunications infrastructure to conduct their business, both to process the transaction as well as to promote their businesses.

### **AQUATIC INFRASTRUCTURE**

Upgrades to a range of aquatic assets are important to ensure that our great river and coastal experiences remain accessible for visitors to our State. These primarily include water entry and access points such as jetties, boat ramps and cruise ship infrastructure.

## **2. LABOUR & SKILLS**

While business skills are a key theme covered in "Industry Capability" there are broader themes relating to labour and skills that fall outside of this.

Labour supply, especially short term, is significantly impacted by federal immigration policies. This has substantial impacts on the ability of businesses to recruit suitable staff, particularly in more remote areas of the State.

These challenges are likely to become more significant with the increased demand targeted in this strategy requiring the creation of 16,000 additional jobs by 2030.

These jobs will be generated in a range of sectors, including hospitality, retail, accommodation, transport and tours. In addition to the raw requirement for additional labour supply, each have their own training and skills requirements.

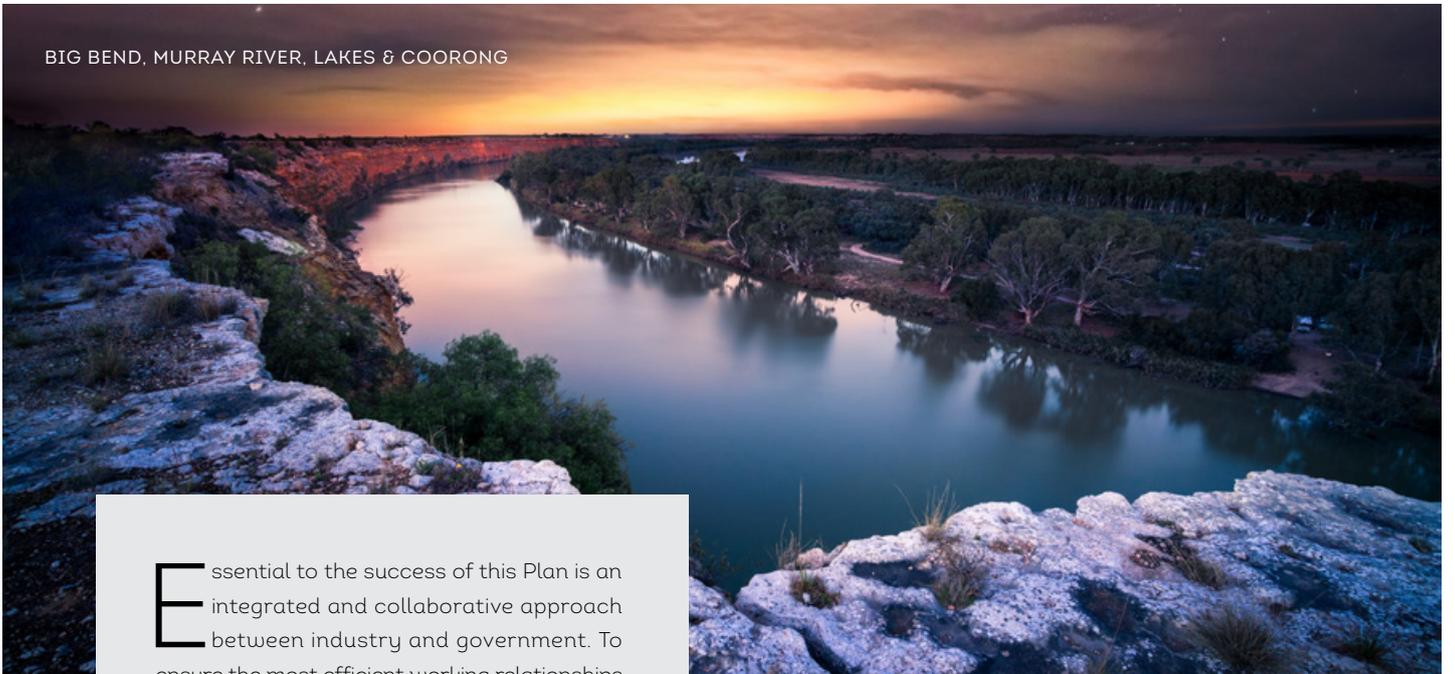
Labour and skills issues are particularly challenging in regional South Australia. Different approaches are required as the large distances involved can make flexible labour supply and access to training programs cost prohibitive.

## **3. STREAMLINING REGULATION**

Industry reports challenges with the complexity of regulatory processes and government requirements that have hampered the progress of key tourism projects. These delays and the associated uncertainty for investors, developers and operators can result in projects being delayed or abandoned. While it is acknowledged that the sustainability and protection of natural and built assets are essential to the long-term viability of our industry, there continues to be instances where regulation requires contemporising or removal. Streamlining and simplifying regulations will lead to increased private investment and the development of more unique tourism experiences across South Australia.

An aerial photograph of a winding asphalt road through a vast, forested valley. The road curves from the bottom left towards the top right. A small white car is visible on the road. The landscape is covered in dense, golden-brown trees, and the background features rolling hills and mountains under a clear blue sky. The lighting suggests a late afternoon or early morning setting.

# **ROLE OF KEY STAKEHOLDERS**



Essential to the success of this Plan is an integrated and collaborative approach between industry and government. To ensure the most efficient working relationships it is essential that the roles of each stakeholder are clear. First and foremost among these stakeholders are the individual operators within the Visitor Economy.

## INDUSTRY

### OPERATORS

- Deliver high quality experiences, accommodation and services.
- Upgrade and expand existing experiences and invest in new experiences.
- Maintain high levels of service to their customers.

### REGIONAL TOURISM ORGANISATIONS

- Lead strong local collaboration between operators, local associations and local government in both in both marketing and supply side development.
- Act as a liaison between the local industry and state and national bodies, such as the South Australian Tourism Commission and Tourism Australia.
- Advocate the importance of the Visitor Economy in the regions, including the positive impact it can have on communities.

### INDUSTRY ORGANISATIONS

- Tourism Industry Council of South Australia (TICSA): As the peak industry body for tourism operators, TICSA has a key role in advocacy and driving business development.
- There are a large number of other industry organisations active in the Visitor Economy and each have their own critical role in supporting their members to drive growth in the Visitor Economy.

## KEY INDUSTRY ORGANISATIONS

The consultation process identified the following list of industry organisations that are important to the success of this plan. This list is not meant to be exhaustive and does not include individually named tourism operators:

- Adelaide Airport
- Adelaide Convention Bureau
- Australian Hotels Association
- Australian Tourism Export Council South Australia
- Business SA
- Caravan and Camping Industries Association of SA
- Caravan and Motorhome Club of Australia
- Festivals Adelaide
- Food SA
- Houseboat Hirers Association
- Regional Tourism Organisations
- Restaurant and Catering Industry Association of SA
- South Australian Universities
- South Australian Vocational Training Institutions
- South Australian Wine Industry Association
- Taxi Council South Australia
- Tourism Industry Council of South Australia
- Tourism and Transport Forum

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## GOVERNMENT

### SOUTH AUSTRALIAN TOURISM COMMISSION

- Drive demand for South Australian experiences through a range of marketing initiatives, including direct to consumer marketing, partnership marketing and promotion to the travel trade.
- Provide leadership for industry and government and encourage collaboration.
- Drive evidence-based decision making throughout the Visitor Economy.
- Work with industry partners, investors and other key stakeholders to drive increased aviation and cruise ship capacity and guide the development of new and refreshed accommodation and experiences.
- Secure, manage and support leisure and business events.

### LOCAL GOVERNMENT

- Work with Regional Tourism Organisations on activities including investment in public infrastructure, experience development, investment attraction and events.
- Encourage local community engagement to be ambassadors for visitors in their area.
- Facilitate servicing of visitor information.
- Take into account the value of the Visitor Economy to the local area in broader decision making.

### OTHER PARTS OF STATE GOVERNMENT

- Ensure appropriate direct investment in the Visitor Economy is maintained and grown.
- Support the growth of the Visitor Economy by ensuring policy and funding decisions take into account the economic contribution of the sector.

### COMMONWEALTH GOVERNMENT

- Through Tourism Australia, promote South Australian products and regions to drive international visitor expenditure.
- Through Austrade, drive the development of strategy and policy relating to the Visitor Economy, and ensure the provision of high-quality research to quantify the impact of the Visitor Economy.
- Support Visitor Economy infrastructure priorities that will drive growth.

## KEY GOVERNMENT ORGANISATIONS

The consultation process identified the following list of government organisations that are of relevance to this Plan. This list is not meant to be exhaustive:

Arts SA

Austrade

Department for Environment and Water

Department of Innovation and Skills

Department of Planning, Transport and Infrastructure

Department of Premier and Cabinet

Department of Trade Tourism and Investment

Department of Treasury and Finance

Local Government Association

Primary Industries and Regions South Australia

Metropolitan Councils

Regional Councils

Regional Development Australia

Renewal SA

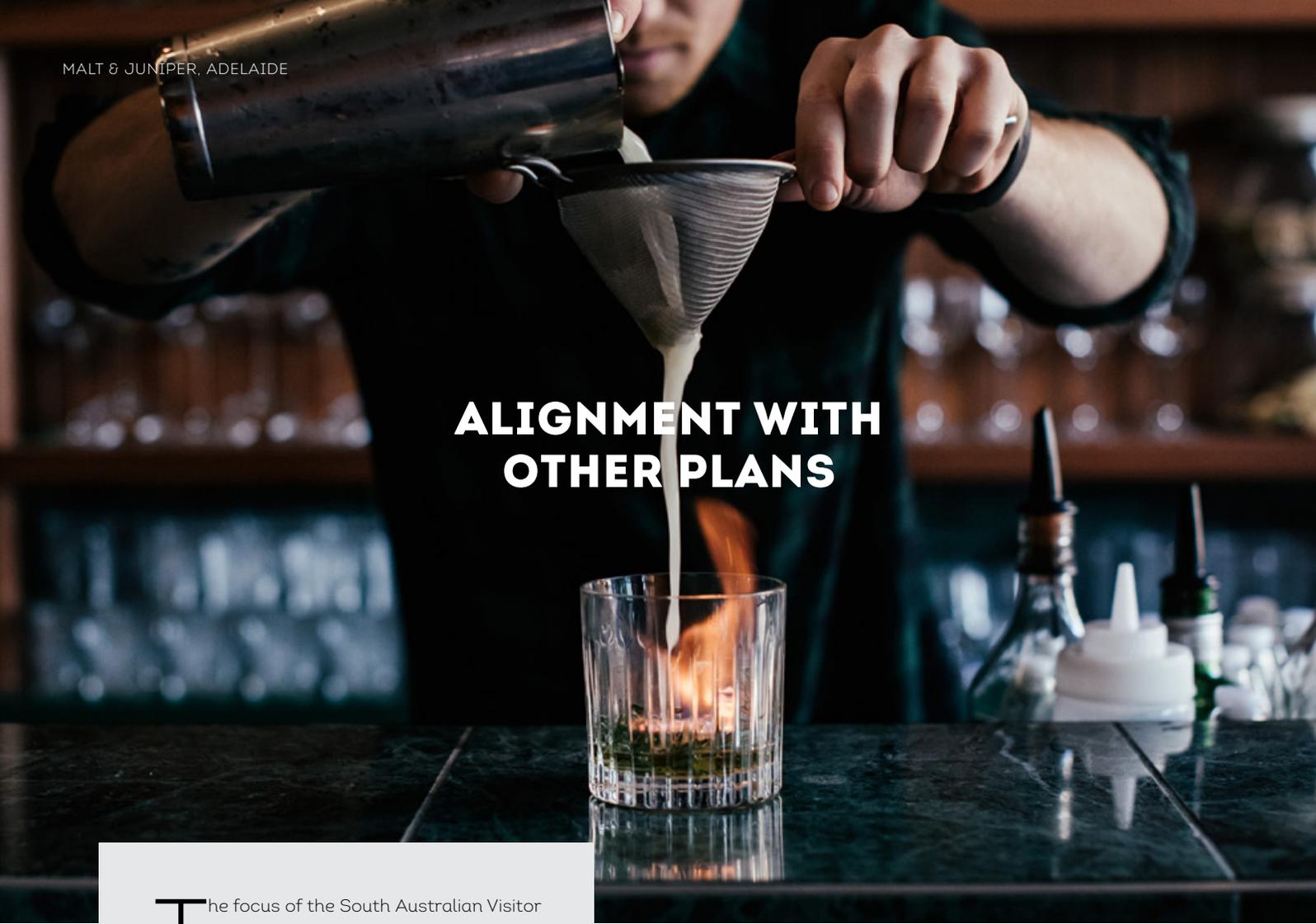
South Australian Heritage Council

South Australian Tourism Commission

StudyAdelaide

Tourism Australia

Tourism Research Australia



## ALIGNMENT WITH OTHER PLANS

The focus of the South Australian Visitor Economy Sector Plan 2030 is intentionally high-level and it is intended to provide connectivity between a range of plans of stakeholders from across the Visitor Economy, providing a clear link between each and the overall ambition of achieving \$12.8b by 2030. This is a challenging ambition and will be achieved in several ways.

### LINKING WITH EXISTING PLANS

During the consultation process the objectives of a range of key stakeholders in the Visitor Economy were considered, and many submitted their own plans for consideration. For example, the international expenditure and aviation targets outlined in this plan were evaluated by Adelaide Airport and confirmed to be in line with their own projections and ambitions.

Many organisations, such as Regional Tourism Organisations, have already aligned their own plans with the previous 2020 Plan. As such, care has been taken to ensure a smooth transition between the 2020 and 2030 plans, with a consistent framework and style used to allow the large number of plans already linked to be easily updated.

### LINKING TO NEW PLANS

Many of the plans that will ultimately drive the achievement of our 2030 ambitions have yet to be written and this is where specific actions relating to individual regions or industry sectors can be outlined and prioritised. These include the plans of Regional Tourism Organisations and Local Government, but also origin market-specific strategies (e.g. China) or theme specific strategies (e.g. nature based tourism). As this Plan is for the overall industry, the South Australian Tourism Commission will also develop its own corporate plan to outline the specific steps required by that agency to achieve the objectives outlined in this plan.

The Visitor Economy is a key growth sector for the South Australian Government. As such, the priorities identified in this Plan, particularly the 'enablers', will be addressed across other relevant areas of government.

Finally, there is currently no national tourism plan that sets the course for our industry beyond 2020, but this is expected to become available in 2019. In anticipation, alignment of this plan with the likely national focus areas has been attempted. For instance, it is currently understood that the national plan for the Visitor Economy will also lead with the critical need for consumer marketing, as does the South Australian Visitor Economy Sector Plan. We also understand it will take a similar expenditure-focused approach to goal setting through to 2030.

An aerial photograph of a vineyard in Seppeltsfield, Barossa. The image shows a long, straight road on the left side, with a white car parked on it. The road is lined with several large palm trees. To the right of the road is a wide, light-colored gravel or dirt area. Further to the right is a large, rectangular vineyard with rows of grapevines. The vines are planted in a grid pattern, and the rows are oriented vertically in the image. The overall scene is captured from a high angle, looking down on the landscape.

**MEASURING SUCCESS**



Essential to the success of the South Australian Visitor Economy Sector Plan 2030 is a robust measurement approach that allows monitoring of each sector of the Visitor Economy to ensure progress remains on track.

These metrics will continue to be published to the South Australian Tourism Commission's Corporate Website.

This Plan outlines the framework for the whole State and guides a number of other core documents that will provide further granularity around the actions outlined here:

- Plans of industry associations and Regional Tourism Organisations.
- The South Australian Tourism Commission's Corporate Plan.
- Plans of other key stakeholders such as the Local Government Association of South Australia, Regional Development Australia and individual councils.
- Business plans of individual operators.

HEADLINE METRICS	2018	2020	2025	2030
<b>VISITOR EXPENDITURE</b>	\$6.8B	\$8.0B	\$10.0B	\$12.8B
<b>JOBS</b>	36,000 (2017)	41,000	45,000	52,000

EXPENDITURE METRICS	2018	2020	2025	2030
<b>INTERNATIONAL</b>	\$1.1B	\$1.4B	\$2.1B	\$3.3B
<b>INTERSTATE OVERNIGHT</b>	\$2.2B	\$2.6B	\$3.2B	\$3.9B
<b>INTRASTATE OVERNIGHT</b>	\$1.9B	\$2.1B	\$2.5B	\$2.9B
<b>DOMESTIC DAY TRIPS</b>	\$1.5B	\$1.8B	\$2.2B	\$2.6B
<b>LEISURE EVENTS</b>	\$362M	\$396M	\$546M	\$750M

SUPPLY SIDE METRICS	2018	2020	2025	2030
<b>INTERNATIONAL AVIATION</b> Seat capacity (per week)	13,600	14,500	18,600	23,800
<b>DOMESTIC AVIATION</b> Seat capacity (per week)	84,500	91,000	104,100	116,000
<b>PROFITABILITY: HOTEL OCCUPANCY, ADELAIDE</b> Source: STR	80%	>80%	>80%	>80%
<b>PROFITABILITY: HOTEL OCCUPANCY, REGIONS</b> Source: STR	58%	>58%	>58%	>58%

REGIONAL METRICS	2018	2020	2025	2030
<b>ADELAIDE</b>	\$3.9B	\$4.6B	\$5.9B	\$7.7B
<b>REGIONAL SA</b>	\$2.8B	\$3.2B	\$4.0B	\$5.1B
<b>ADELAIDE HILLS</b>	\$172M	\$192M	\$245M	\$310M
<b>BAROSSA</b>	\$213M	\$226M	\$291M	\$372M
<b>CLARE VALLEY</b>	\$89M	\$104M	\$132M	\$166M
<b>EYRE PENINSULA</b>	\$310M	\$313M	\$397M	\$500M
<b>FLEURIEU PENINSULA</b>	\$460M	\$509M	\$643M	\$807M
<b>FLINDERS RANGES &amp; OUTBACK</b>	\$462M	\$501M	\$638M	\$804M
<b>KANGAROO ISLAND</b>	\$126M	\$147M	\$199M	\$268M
<b>LIMESTONE COAST</b>	\$340M	\$374M	\$479M	\$609M
<b>MURRAY RIVER, LAKES &amp; COORONG</b>	\$148M	\$155M	\$196M	\$246M
<b>RIVERLAND</b>	\$176M	\$200M	\$252M	\$317M
<b>YORKE PENINSULA</b>	\$205M	\$231M	\$289M	\$359M

CONSUMER METRICS	2018	2020	2025	2030
<b>INTERSTATE PERCEPTIONS</b> Good food & wine	1st (57%) ahead of Victoria (56%)	Consolidate 1st place	Hold 1st place	Hold 1st place
<b>INTERSTATE PERCEPTIONS</b> Credible wineries & wine regions	Outright 1st (70%)	Hold 1st place	Hold 1st place	Hold 1st place

*A note on Data Sources: The majority of performance metrics are collected by Tourism Research Australia in partnership with the SATC through the National Visitor Survey and International Visitor Survey programs. Further information on these surveys can be found on the South Australian Tourism Commission's corporate website or from Tourism Research Australia.*



In addition to these jobs and expenditure measures, each individual strategic priority has its own specific objectives that will contribute to the overall success of this Plan. These are:

## OBJECTIVES



### MARKETING

- ▶ Ensure South Australia is well known, appealing and strongly associated with its key brand pillars.
- ▶ Encourage visitors to recommend and promote South Australia as a destination.
- ▶ Ensure South Australia has a strong positive social media presence.



### EXPERIENCE & SUPPLY DEVELOPMENT

- ▶ Ensure South Australian products are registered on the Australian Tourism Data Warehouse (ATDW).
- ▶ Develop new or refreshed quality accommodation options in each tourism region.
- ▶ Increase International direct seats per week to Adelaide Airport.
- ▶ Increase domestic seats per week to Adelaide and regional airports.



### COLLABORATION

- ▶ Drive strong engagement by all sectors of the Visitor Economy in tourism planning, particularly at a regional level.
- ▶ Ensure prominent placement of South Australian experiences in promotions by external parties (e.g. Tourism Australia, airlines).



### INDUSTRY CAPABILITY

- ▶ Increase the number of tourism businesses with membership of industry associations, especially the Tourism Industry Council of South Australian (TICSA), Regional Tourism Organisations, the Australian Tourism Export Council (ATEC), the Tourism & Transport Forum (TTF) and the Australian Hotels Association (AHA) among others.
- ▶ Increase the number of tourism businesses registered on the Australian Tourism Data Warehouse (ATDW).



### LEISURE & BUSINESS EVENTS

- ▶ Increase economic impact of major events, as measured by event surveys.
- ▶ Increase broadcast and public relations value of major events.
- ▶ Increase frequency and impact of regional events.
- ▶ Increase business events contribution to visitor expenditure.



### PROMOTING THE VALUE OF TOURISM

- ▶ Ensure the Visitor Economy is considered in government decision making at all levels.
- ▶ Drive positive community sentiment towards the Visitor Economy.
- ▶ Publication and usage of research to drive decision making.

# ACKNOWLEDGEMENTS



This South Australian Visitor Economy Sector Plan 2030 was built through extensive consultation and reflects the diversity of Visitor Economy stakeholders. Almost 700 people were involved in the development of this Plan. We extend our sincere thanks to all for their time and passionate input.

Workshops were conducted by the South Australian Tourism Commission in partnership with Regional Tourism Organisations, Regional Development Australia and Local Government in 16 locations across South Australia. These workshops involved over 400 people, with representation from local government, industry operators, industry associations and regional tourism organisations, as well as government decision makers.

The process ensured rigorous and open discussions to identify the key themes, followed by participants voting to prioritise these themes. This was then used to identify the six strategic priorities and the three enablers outlined in this Plan.

A survey was also conducted with almost 200 responses received.

Meetings were held with 20 key industry and government organisations to delve deeper into specific aspects of the Visitor Economy and the opportunities through to 2030.

Finally, a draft plan was published to the SATC Corporate Website for industry feedback. Over a dozen formal submissions were received from organisations across South Australia, and more than 50 provided their feedback through the online survey. This was a critical step to ensure that the consultation had correctly captured the ambitions and needs of our industry.

## WORKSHOP LOCATIONS



*The research data underpinning the Plan is primarily sourced from Tourism Research Australia, as well as research conducted directly by the South Australian Tourism Commission.*



## CONTACT US

For more information, please visit the  
South Australian Tourism Commission website:

**TOURISM.SA.GOV.AU**

