

Dear Tourism Industry Colleague,

Thank you for taking the time to read the 2009 – 2014 South Australian Tourism Plan Draft.

This draft plan has been produced following a comprehensive review of the existing plan (the South Australian Tourism Plan 2003-2008), three sessions with the Minister's Tourism Round Table on the Plan, topic based workshops with expert participants from around the country, and more than 50 written submissions from tourism stakeholders.

The plan is deliberately focused, with just 14 ideas under four focus areas, to ensure we concentrate on the key things that are going to help us reach our target of a \$6.3 billion tourism industry by 2014.

The final consultation phase will last until 24 October 2008, and we would appreciate any feedback on the following document before this date.

To provide targeted feedback, we have included a number of questions below to answer.

There is also space to include any other thoughts you have on the plan.

Thank you for your time, and we look forward to working with you towards a stronger tourism industry in South Australia.

1. What is the one thing you really like about the South Australian Tourism Plan 2009-2014?

2. Is there one idea that you would add to make the Plan even better? Which of the existing 14 ideas would you remove to make room for this? And why?

3. How would you list the top 14 ideas in order of priority?

4. Do you have any other thoughts/feedback on the plan in general?

Contact email address (Optional):

SOUTH AUSTRALIAN TOURISM PLAN 2009 – 2014

Foreword

South Australia is renowned for its strong tradition of tourism planning. Since 1981, successive governments have collaborated with industry to identify a shared vision and clear sense of purpose for achieving sustainable tourism growth.

Recently, however, it has become apparent that South Australia needs a more finely tuned approach. Changing consumer patterns and growing competition from interstate and abroad demand a more succinct, strategic focus, with greater emphasis on actions and outcomes. Put simply, we need to think and act smarter, by directing our activities at those markets, consumers and investment opportunities, which can deliver the best return on investment.

Any change can be confronting, and this new approach might generate controversy in some quarters. However, it is a highly strategic, carefully targeted plan. The 'all things to all people' approach isn't producing the change we need – South Australia must focus on its proven strengths to build appeal, create greater impact among key consumers in key markets and generate better return on our investment.

More than 200 ideas and 50 written submissions were put forward during the consultation process for this plan, highlighting again the pride and passion of tourism operators and stakeholders across South Australia. All of these ideas are shown in Appendix 1. However, the government and industry will very deliberately focus on just fourteen key ideas, as we strive to build tourism into a \$6.3 billion industry by 2014.

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

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1. INTRODUCTION

The South Australian Tourism Plan 2009-2014

What is it?

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

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

It's a 'big picture' document aimed at long-term, sustainable growth. It does not offer minute detail on how to get things done – the consultation process revealed that neither government nor industry is keen on that approach. However, both are committed to embracing these key strategies and delivering the goods.

Why plan?

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

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

What's different this time?

Good planning will always include a vision and a brand, a review of performance and capabilities, and the setting of targets and key audiences. What's often overlooked, though, is a clear, simple focus on getting things done.

This is the sixth South Australian Tourism Plan, and it will be the most focused. We've deliberately focused on a small number of significant actions to inspire and engage the industry and give South Australia the best shot at achieving our targets.

What underpins this plan?

Sustainability has always been at the heart of tourism planning in South Australia, and this document is no different. Throughout the consultation process, the principle of sustainable development was raised time and again, as were the key themes of collaboration, quality, authenticity, innovation and growing profitability.

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

What does it mean to you?

Tourism Businesses

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

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

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

The Government

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

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

Key government partners will include Environment and Heritage; Trade and Economic Development; Planning SA; Transport Energy and Infrastructure; Premier and Cabinet; Treasury and Finance; ArtsSA; Sport and Recreation; and Education.

The Employee

Tourism is a major employer in South Australia, and we hope this plan serves to reinforce the scope and energy of the industry. Right across the state, people are passionate about the future, and eager to work collaboratively to forge on a new era of success. The message is simple: opportunities abound in South Australia's tourism industry – it's a career path worth pursuing.

The Student

Again, we hope this plan acts as an inspiration for students considering a career in the industry (with its contextual nature and detailed industry insights, it should also serve as a handy reference tool).

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

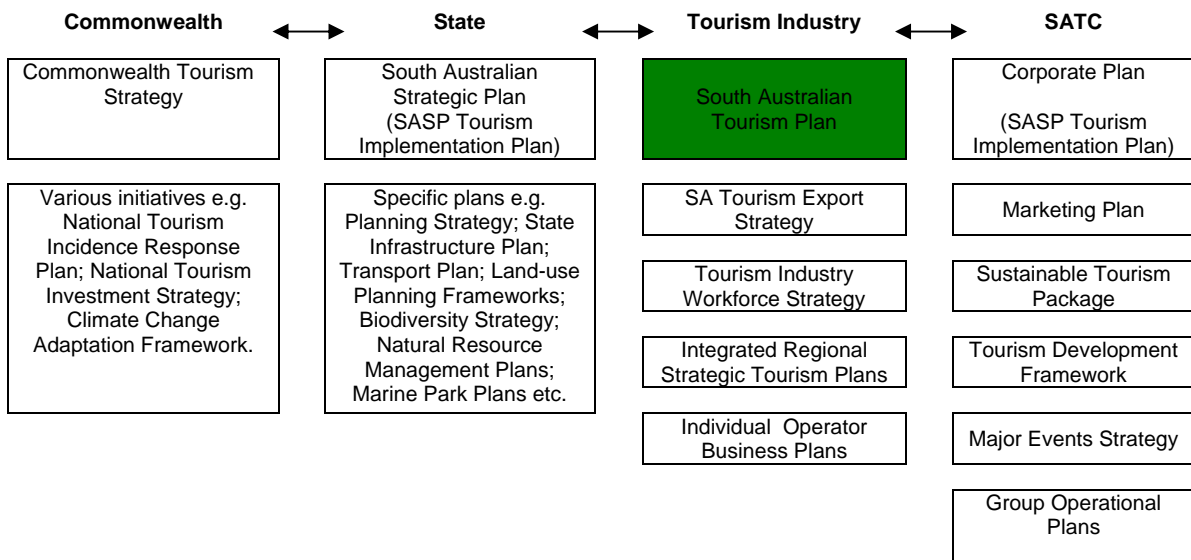
How does it fit with other plans?

The South Australian Strategic Plan provides the vision and framework for building a prosperous, healthy and sustainable state (see www.stateplan.sa.gov.au).

It contains one tourism target: to increase visitor expenditure to \$6.3 billion by 2014. This same target has been adopted in the South Australian Tourism Plan 2009-2014.

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

Figure 1: Tourism Planning Framework



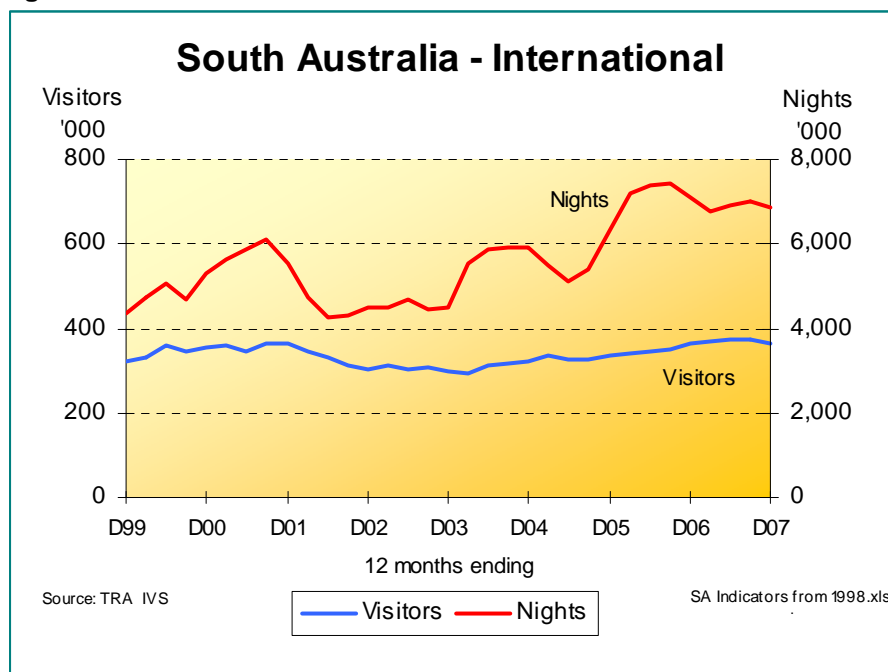
2. THE PRESENT

Our Performance

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

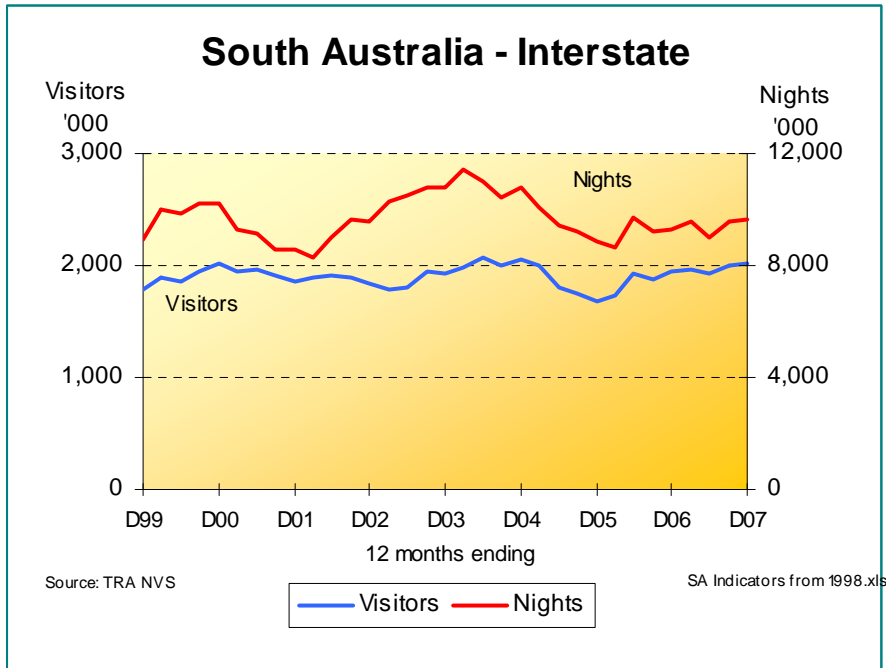
International: From 1999 to 2007, South Australia’s average annual growth rate in visitor numbers was 1.6 per cent, lagging behind the national growth rate of 2.9 per cent. The state’s average annual growth in nights was 5.9 per cent, slightly above national average growth of 5.7 per cent.

Figure 2: International Performance 1999-2007



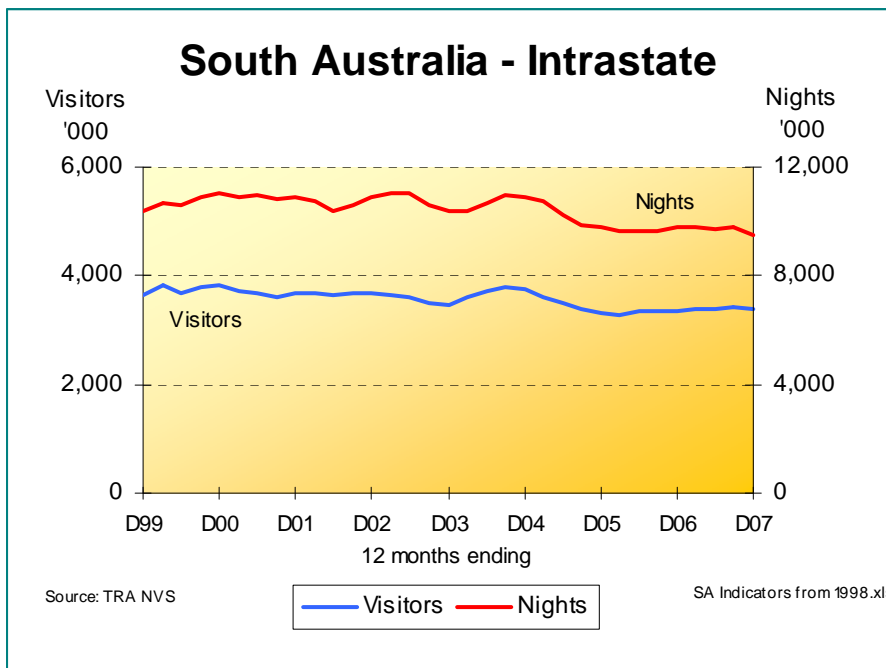
Interstate: From 1999 to 2007, South Australia’s average annual growth rate for interstate visitors was 1.6 per cent (nationally growth was 1.9 per cent). South Australia’s average annual growth in interstate nights was 1 per cent, slightly higher than with the national average annual growth rate of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

Figure 3: Interstate Performance 1999-2007



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

Figure 4: Intrastate Performance 1999-2007



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

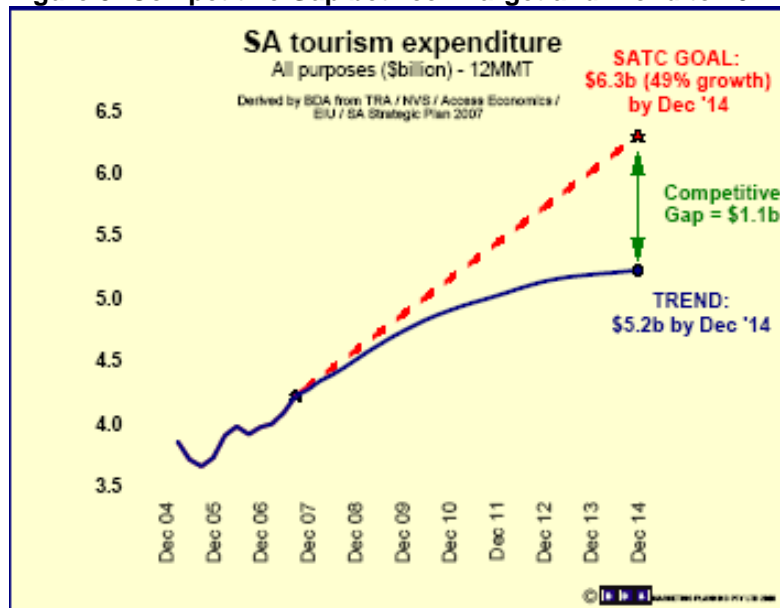
The downward trend in domestic tourism, both nationally and in South Australia, has been caused by factors including higher levels of personal and household debt; changing household consumption patterns; greater levels of outbound travel; a changing labour market; the growth in low-cost airlines; and increasing domestic holiday costs (not least the high price of petrol) reducing affordability and competitiveness.

Our Target

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

In 1999, tourism and travel expenditure generated \$3.15 billion for South Australia. By 2007 this figure had grown 34 per cent, to \$4.2 billion. This represents an annual growth rate of 3.7 per cent per annum¹. From 2000 to 2007 the increase was 13 per cent or 1.7 per cent per annum. By comparison, to achieve the target by 2014 requires 6 per cent per annum average growth.

Figure 5: Competitive Gap between Target and Trend to 2014



¹ The figure includes the impact of the GST.

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

Recent ‘appeal testing’ research commissioned by the South Australian Tourism Commission suggests marketing alone won’t close the gap. It shows that communicating the best of South Australia today will achieve \$300 million in additional spending, while improving access and developing a more appealing SA of tomorrow (experiences, infrastructure, events) will be required to close the remainder of the gap (\$800m).

Our Audience

Figure 6: Origin of Visitors

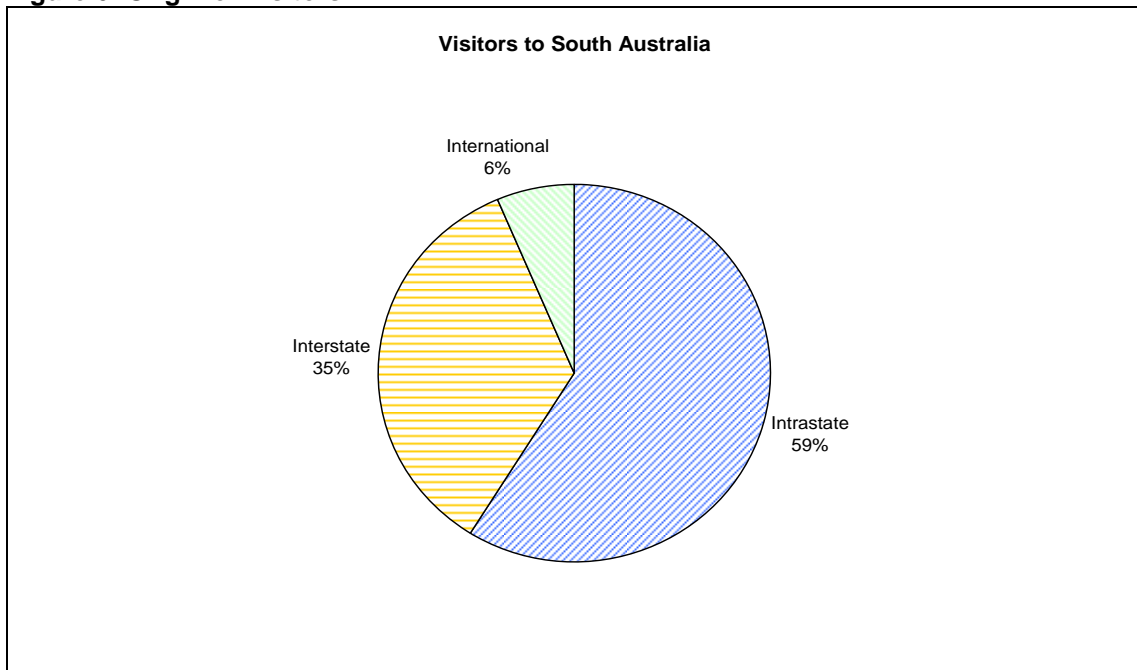


Figure 7: Origin of Nights

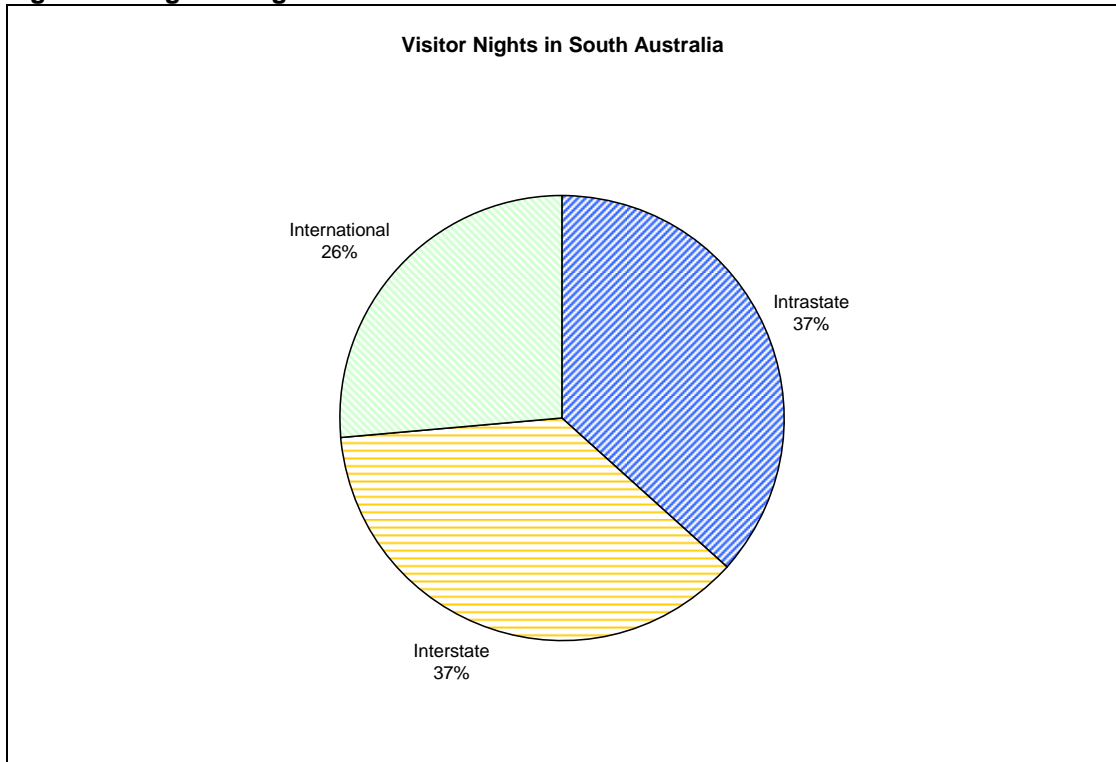
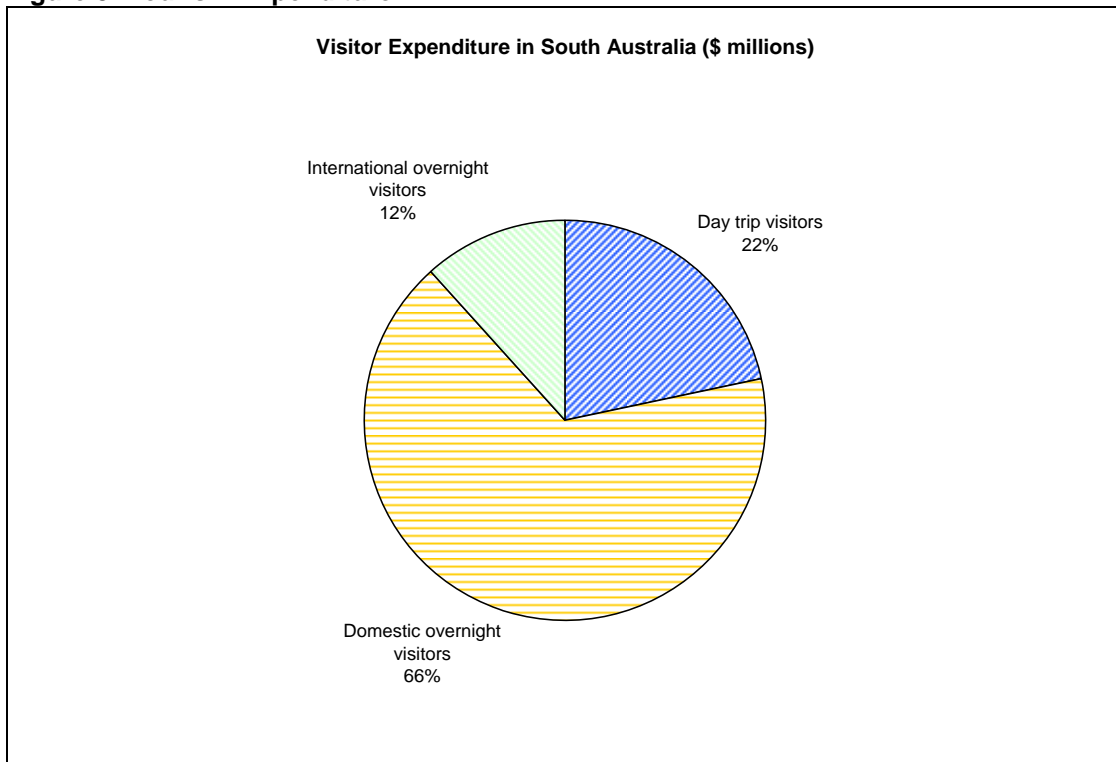


Figure 8: Tourism Expenditure



Domestic

Domestic tourism accounts for 94 per cent of South Australia's visitors, 73 per cent of visitor nights (2006) and 88 per cent of visitor spend. South Australia's tourism target is expressed in terms of spend. Within the domestic

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market, 14 per cent of the Australian population (2.4 million people) spent more than \$2000 on their last trip.

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

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

In tourism marketing, these people are known as *Experience Seekers*². However, in specifically targeting this segment (or any segment for that matter) South Australia has a considerable challenge. The state records the lowest appeal among Australian *Experience Seekers*, at just 13 per cent. And we currently win just 3 per cent of Australia's high-yield holidays.

International

South Australia must also continue to target discerning and high yielding international *Experience Seekers* from priority markets including Europe, UK, the Americas, Asia, New Zealand and Japan. With India and China, we must commit to longer-term developmental investment.

Lack of direct air access is a key constraint to the growth of South Australia's international market. Development and distribution of the South Australian experience is also vital. As international interest grows in authentic destinations, South Australia is well positioned to offer more appealing specialty experiences based around our inherent strengths of events, culture, wine, nature and wildlife.

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

Experience Seekers

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

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

² For more information on **Experience Seekers** please visit the Corporate Websites of the South Australian Tourism Commission and Tourism Australia

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Seventy-five per cent travel without children; are between 30 to 60 years old; most are university-educated; and most come from capital cities (predominantly Melbourne and Sydney). *Experience Seekers* prefer to find out about holidays through TV travel shows, newspaper and magazine editorial and television advertising.

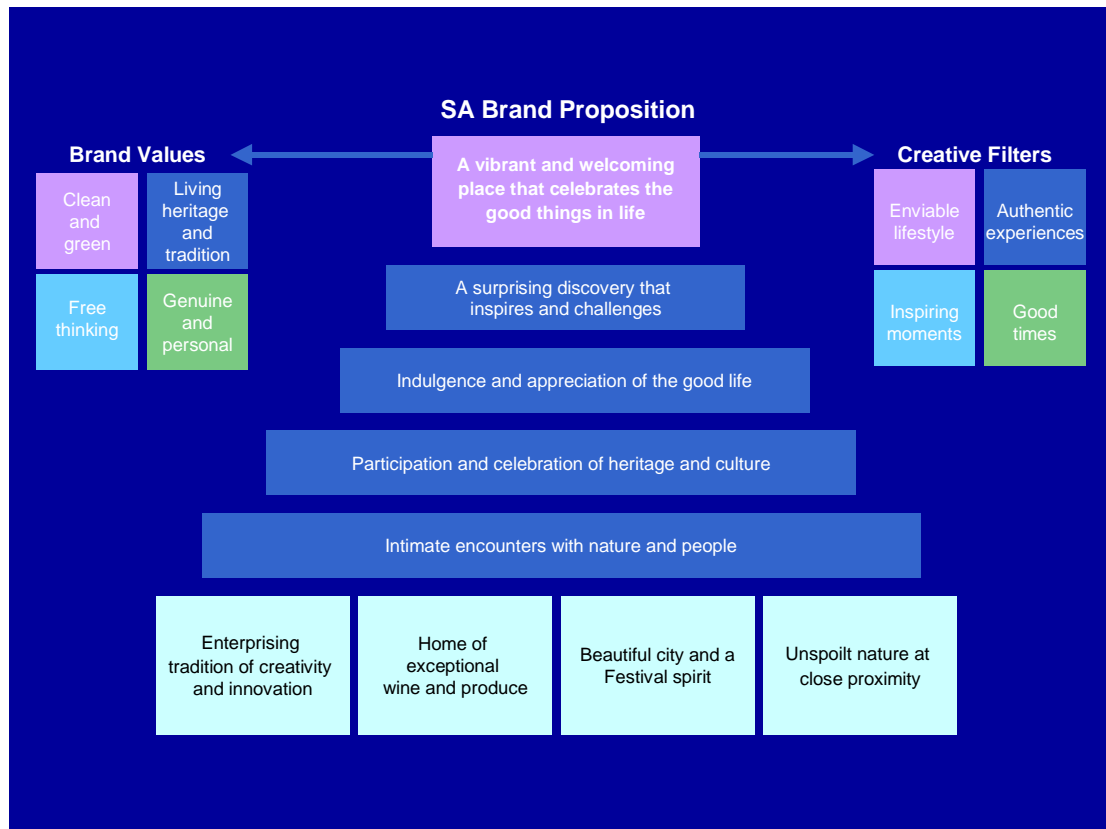
They prefer to find out more about holidays through credible websites, including those of state tourism bodies. They book their holidays through online travel services, directly over the internet or through a travel agent.

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

Brand Strategy

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

Figure 9: South Australia's Brand Strategy



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

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

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

Our Priorities

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

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

- **Communicate with impact:** (reach consumers with the right message, through the right mediums at the right time). South Australia has a low preference among the Australian target audience and has not been consistent in its spend or message in recent years. The SATC and industry needs to spend more, market more directly and with greater impact.
- **Develop new signature experiences:** (attract investment capital into South Australia and grow/attract events). South Australia needs 'new news' and to further develop areas of raw appeal to change our target consumer's perception of SA. This includes an accent on the word 'tourism' in the food and wine tourism offering; and further development of areas of appeal including Kangaroo Island, the Murray River and Eyre Peninsula.
- **Improve distribution channels:** (cooperatively market with airlines and significant tourism operators and optimise new technology). Motivating people to travel is one thing – ensuring we are globally connected via the travel distribution system (traditional or online) is another. The SATC and industry need to support SA experts to ensure we convert more of the business.

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- **Improve air access:** (particularly direct inbound flights). Adelaide and South Australia is an under-serviced destination. The aim is to grow domestic weekly seat numbers from 70,000 to 100,000 and double international seat numbers. Every new seat into Adelaide is a new opportunity to grow tourism yield.
- **Ensure a positive policy environment:** (align the rules with the vision to facilitate new development). Encouraging investors through a proactive stance and a lack of red tape will be essential. This will require an all-of-government approach.
- **Build industry capability:** (progress from a perceived cottage industry sector to a genuine economic leader; and reduce reliance on government). Real industry leadership is required, including the need for industry to take responsibility for its own development.

3. THE FUTURE

South Australia's tourism industry cannot control the forces driving global tourism demand, or their impact on local performance. But we can proactively shape the future – by controlling what we can, and adapting to what we cannot. By understanding the strategic context of the industry, and mapping alternative tourism futures, we're better equipped to make decisions on key target markets, destination management, tourism operations and development of experiences.

Environmental Scan Summary

If South Australia is to grow visitor numbers and visitor spend, it's essential that we look ahead to the factors that are likely to shape future supply and demand in tourism. Below is a summary of our top six 'current shocks' (the main trends and factors shaping tourism futures) and how the state plans to respond.

Economic Outlook

Tourism demand is driven largely by economic performance. Global uncertainties including financial market corrections and cost impacts of oil prices especially on aviation are likely to suppress demand and affect access. Nationally, movements in exchange rates can make it more costly to come to Australia and cheaper for Australians to travel overseas – currently outbound travel continues to boom. Rising interest rates and falling consumer and business confidence will suppress discretionary spending on domestic holidays. This is consistent with normal economic cycles – expect short-term contraction with recovery around 2010.

There will be difficult times ahead in the short-term. We must use this time to be prepared for when things recover. We must ensure SA holidays are competitive by focusing on developing world-class experiences. Focus on the more 'resilient' consumer in these circumstances. Make it easy and add value to our holiday offer. Increase emphasis on intrastate market and their needs.

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Ageing Population

The first post WW11 baby boomers in the developed world began to retire in the past five years. This segment is growing rapidly and enjoying comparatively high retirement incomes and tax benefits. Boomers are embracing their newfound freedom, staying active and have a greater sense of adventure and discovery than their predecessors. Retirees are driving domestic tourism (spend by over 55s increased by 23% 2002-2007 compared with a decline in other age segments).

This trend will continue. There will be an increased need to understand this market segment and its emerging preferences and then to meet its needs. Tapping into the desire for learning, healthy and active lifestyle is the key. To ensure the long-term sustainability of the domestic tourism industry, we must also encourage young people to travel more domestically.

Labour and Skills

As baby-boomers retire they are leaving behind a huge employment gap. In SA this is exacerbated by competition for labour from more competitive sectors in terms of attracting labour e.g. mining and defence. Rising wage costs may force closure of some marginally profitable businesses.

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

Rhythm and Balance

The speeding up of more or less everything as a consequence of globalisation and technological change is making some people feel uneasy. There is an aspiration to slow down. Spending on leisure and holidays is a key way of doing this. There is also an emerging reaction to the mental pollution caused by marketers. People will seek out islands of peace to restore mental and physical health. The growth in the 'body and soul' wellbeing phenomenon is powerful evidence of this trend. Learning will be one way that people cope with the anxiety of change.

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

Climate Change and Sustainability

With the introduction of an emissions trading scheme (now called the Carbon Pollution Reduction Scheme) in 2010, the tourism industry will be exposed to an increase in costs from a broad range of sources. In particular, electricity, gas and transport fuels are expected to rise with the introduction of a carbon

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price signal. This will impact on tourism operators directly, but also indirectly, as the costs of goods and services will increase.

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

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

The Online Phenomenon

Television and Internet dominate media use. In 2006, 79% of Australians were online. The Internet is revolutionising the way we communicate, do business and more specifically the distribution system in tourism. It will be the main source of information and will shorten the supply chain as tourists purchase product/services directly from the supplier.

This will impact on the use and value of the travel agent and wholesaler, requiring appropriate adaptation and response from these sectors of the industry. As Consumer-Generated Media (social networking and online word of mouth increases) this will make delivery of distinctive, exceptional experiences crucial to success.

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

Vision

Our vision is that:

By 2020 SA will have capitalized on its massive tourism potential and will be a world's best destination supporting a sustainable and profitable industry.

South Australia will reap enormous benefits from a vibrant convention and education tourism sector and from being Australia's best cycle tourism experience. The SA experience will be characterised by our:

- Celebration and telling of the authentic SA story
- Marriage of heritage with contemporary expression

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- Engagement with people on their life-journey
- ‘Bundling’ and presentation of quality, value for money, activities
- Excellence in innovative sustainable design
- Provision of choice and exceeding visitor expectations.

South Australia will stick to its brand strategy and message and tell the world about these exciting opportunities through innovative marketing communications and distribution. It will take collaborative relationships and commitment to new levels

South Australia’s authentic experiences will be so compelling, that it will be our visitors who will build an uplifting SA brand, by spreading the word about the amazing and memorable time they spent here. SA will be their favourite Australian destination.

Scorecard

A successful vision is backed by achievement. Sustainability and profitability lie at the heart of the *South Australian Tourism Plan 2009-2014*, underscoring the fact that a balanced approach is vital. But a flexible mix of goals is also essential for promoting the value of the state’s tourism industry. Tourism is a major economic generator for South Australia, but it plays a vital role in social and environmental terms. Unlike many industries, tourism has the capacity to influence other targets in the South Australian Strategic Plan, and provide simultaneous benefits across the state’s triple bottom line.

Table 1: The Balanced Scorecard

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

4. FOUR FOCUS AREAS AND TOP 14 IDEAS

Selection Criteria

This plan has a very deliberate focus on just four key focus areas and 14 ideas within these. Strict selection criteria were used to elevate those ideas from an extensive list developed throughout the consultation process (although it must be said that many of the ideas raised throughout the consultation could be converged into a few common themes). Nonetheless, the following criteria were applied to ensure a disciplined approach to the strategic planning process:

Table 2: Criteria for Prioritisation

SELECTION CRITERIA	DESCRIPTION
Strategic	The idea must sit within the context of an existing plan, strategy or evidenced based research.
Brand	The idea must be underpinned by South Australia’s brand proposition and values.
Appeal	The idea must relate or appeal to consumers in the state’s target audience of ‘ <i>Experience Seekers</i> ’.
Collaborative	The idea’s implementation and commitment does not rely solely on the South Australian Tourism Commission.
Funding	Funding and resources must exist or be potentially acquired to implement the idea.
Timeframe	The idea must be capable of being achieved within five years (or earlier).
Sustainability	The idea must be sustained financially, with no adverse environmental, social or political implications.

Summary of Four Key Focus Areas and Top 14 Ideas

DEVELOP

1. Remove any external planning and policy impediments to sustainable tourism development and appropriately ‘case manage’ strategic projects.
2. Develop new and refreshed ‘signature’ infrastructure in South Australia.
3. Further develop Adelaide’s tourism appeal through inspiring urban design initiatives.

LEVERAGE

4. Grow new and existing festivals and events as ‘new news’ and compelling reasons to visit South Australia.
5. Encourage further investment in South Australia’s food and wine tourism assets, to ensure an unassailable Australian leadership position.
6. Market Adelaide as an appealing destination for business events.
7. Build Adelaide’s reputation as a global study destination to encourage greater visitation and regional dispersal.
8. Make capturing the hearts and minds of visitors via authentic and powerful storytelling a point of difference in building SA’s visitor experiences.

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ACTIVATE

9. Make Adelaide and South Australia a destination that can be most easily reached – with a particular focus on improved air access.
10. Ensure consumer demand finds the points of sale that are best able to convert that demand into a SA holiday booking.
11. Create a single, strong industry body that takes responsibility and leads operators to a sustainable tourism future.

COMMUNICATE

12. Spend more time and money communicating the best of what the target audience wants to buy.
13. Leverage partnerships that help us to reach the target audience with the most compelling message and offer possible.
14. Create a strategic network of exemplar online Visitor Information Centres that have a highly collaborative linked outlook.

Additional Ideas

A more detailed list of ideas to emerge from the consultation process is included as Appendix 1. The extended list highlights South Australia's scope, creative thought and passion. We encourage and challenge readers to take a look, embrace the most appealing idea and champion its implementation. In the meantime, the State Government and industry will deliberately focus on 14 key ideas, as we strive to grow the value of tourism over the next six years.

5. PLAN OF ACTION OVER THE NEXT SIX YEARS

DEVELOP

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
1.	Remove any external planning and policy impediments to sustainable tourism development and case manage strategic investment through the process.	A positive tourism planning and policy environment is crucial to attracting appropriate investment and encouraging investors to inject their funds into the destination. Informed analysis plays a vital role in informing South Australia's destination development needs and, importantly, the requirements of the target audience. All investment should follow the <i>Design Guidelines for Sustainable Tourism Development</i> , to protect the state's heritage, culture and natural beauty.	<ul style="list-style-type: none"> 80 per cent of councils to feature positive policy provisions for tourism in their development plans by 2014, through tourism-specific DPA or conversion to latest BDP Tourism Module. A whole-of-government cooperative approach to case planning of at least six new signature projects by 2014. Government agencies to include tourism objectives in their corporate plans. 	<ul style="list-style-type: none"> Undertake research to prepare a Destination Development Plan that reinforces South Australia's core attributes and results in product and accommodation that appeals to high-yield visitors. Take into account Regional Tourism Strategic Plans. Link tourism policies with other state policies to generate benefits between sectors and achieve sustainable strategic outcomes for the state. Maximise opportunities for successful, sustainable tourism development by streamlining state and local government planning approvals. Support innovative green designs by adopting a whole-of-government case planning approach with incentives. 	<ul style="list-style-type: none"> SATC BDA RTOs <ul style="list-style-type: none"> SATC SA government agencies <ul style="list-style-type: none"> Ministers SATC Planning SA DTED DTEI DEH DWLBC RDBs Councils Private investors Financiers 	<p>Yes</p> <p>Yes</p> <p>Yes (Incentives not funded)</p>

DEVELOP

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
2.	Create new and refreshed tourism development in South Australia.	Destinations are only as good as the experience offered – increasing South Australia’s appeal will be crucial if we’re to reach our tourism target. New investment with an emphasis on design is needed in infrastructure, public attractions and accommodation. We must identify and collaborate with investors to develop new experiences and refresh existing properties (thereby giving our target market new and refreshed reasons to visit and something fresh and new to communicate).	<ul style="list-style-type: none"> • Increase new investment to \$200 million by 2014. • 10 major upgrades of existing properties by 2014. • Increase strategic government funding of infrastructure projects in next five years. 	<ul style="list-style-type: none"> • Identify opportunities to entice land owners, investors and developers to build world-class visitor experiences • Encourage critical mass in regional areas by facilitating the development of new 4-5 star convention and accommodation facilities in key locations. • Upgrade vital tourism infrastructure at key locations that appeal to the target audience. Take into account Regional Tourism Strategic Plans. 	<ul style="list-style-type: none"> • SATC • DEH • Investors • SATC • Investors • Regional Development Boards • SATC • DEH • DTIE 	<p>Yes</p> <p>Not yet</p> <p>Partially but greater investment needed from private operators</p>

DEVELOP

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
3.	Develop Adelaide's tourism appeal by upgrading its special places and spaces.	As with many destinations globally, our capital city is top of mind when consumers are considering their holiday options. Research shows that Adelaide has failed to substantially shift long-standing negative perceptions. In fact, many Australians still do not perceive it as a compelling destination. Priority must be given to developing and promoting experiences that bring the city to life. Adelaide is a sophisticated, elegant and enlightened city, so an array of physical cultural attractions with engaging interpretation is needed, rather than an icon-driven solution.	<ul style="list-style-type: none"> • Increase number of Adelaide 'preferrers' from 950,000 in 2007 to 1.5 million by 2020 (Source: Roy Morgan Holiday Tracking Survey). • Increase Adelaide's share of capital city tourism from 9% in 2007 to 14% by 2020. • Increase room night demand in the City by 5% p.a. 	<ul style="list-style-type: none"> • Prepare and implement a master growth plan based on excellent high quality urban design (e.g. complete North Terrace upgrade from Wine Centre to West End, develop Victoria Square, reinvigorate the Torrens Precinct and Elder Park). • Adopt recommendations in the Adelaide City Council's Tourism Action Plan, to be released in 2008, particularly in regard to cycling, walking, cultural interpretation, public art and signage. • Invest in a program of regular refurbishment of major hotels, motels and caravan parks in the Adelaide area. 	<ul style="list-style-type: none"> • Adelaide City Council • Other key LGAs • SA Government • SATC • Adelaide City Council • Private hoteliers and property owners 	<p>No</p> <p>Partially</p> <p>Not known Private investment required.</p>

LEVERAGE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
4.	Grow new and existing festivals and events as a brand enhancer and compelling reason to visit South Australia.	In the past 13 years, South Australia has developed an impressive events calendar that is building local confidence; profiling the state as a tourism destination; strengthening SA brand image; giving tourists a reason to visit and contributing to accommodation occupancy. South Australia rates third among all states for its association with events, and we need to build on this. We must take stock of our portfolio of leisure events (sport, arts and culture) to strategically grow the calendar. In doing so, we'll further enhance our events appeal and increase the sector's economic and social importance.	<ul style="list-style-type: none"> • Increase the economic value of leisure events to \$310 million by 2014. • Target domestic and international media exposure of \$75 million for managed events by 2014. • Overtake NSW on the Brand Health Monitor to achieve the second highest association factor for events among all states by 2014. 	<ul style="list-style-type: none"> • Initiate an Events Strategic Plan, underpinning future investment, management, development, bidding and programming (with a view to a better spread throughout the year) of major festivals and events up to 2014. • Identify and develop 10 to 12 key regional festivals and events that have the potential to attract large crowds, including out-of-state visitors. Ensure SATC funding is more strategic and supports the best regional festivals and events that underpin the brand. • Improve international and domestic packaging of event experiences and pre and post-touring opportunities to encourage visitors to stay longer. 	<ul style="list-style-type: none"> • SATC • ArtsSA • Sport and Rec • AFCT • Event Companies • Major venues <ul style="list-style-type: none"> • SATC • ArtsSA • Sport and Rec • Councils • RDBs • Event Organisers and Volunteers <ul style="list-style-type: none"> • SATC • Wholesalers • Travel Agents 	<p>Yes</p> <p>Yes</p> <p>Partially</p>

LEVERAGE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
5.	Invest in South Australia's food and wine tourism, to achieve an unassailable position of Australian leader.	South Australia's dominance as a food and wine destination is under dispute in our major domestic markets. It's time to demonstrate that South Australia is not just the heart of Australian wine, but has the most credible and authentic wineries, wine regions and culinary distinctions in the world. The appeal of any wine region is still largely based on its reputation for quality wine, but visitor expectations are clearly changing. South Australia must be at the cutting edge of global cellar door experiences, and lead the way in distinctive regional produce and dining experiences. And we must better link and package food and wine tourism with complementary South Australian experiences.	<ul style="list-style-type: none"> • Increase South Australia's association with distinctive dining and fresh regional produce from 8 per cent in 2007 to 25 per cent in 2014 (single response) Source: SATC Brand Health Monitor. • Increase South Australia's share of visitors to Australian wineries from 20 per cent in 2007 to 25 per cent in 2014. • More than \$75 million in <u>strategic</u> tourism and tourism-related development by 2014. 	<ul style="list-style-type: none"> • Implement the recommendations of the SA Food and Wine Strategy 2009-2014 to guide the state's wine tourism agenda in cooperation with key partners. • Rebundle, package and distribute food and wine experiences, where respect for SA as a destination derives from the diversity of complementary authentic experiences that provide the rewards visitors are seeking (e.g. great beaches, living heritage, enjoying the locals way of life, healthy activities e.g. cycling etc), and generate media coverage of these new combined itineraries. • Increase South Australia's range of innovative wine and food experiences. Stay attuned to visitor motivations and satisfactions (e.g. unique dining, gourmet retreats, cooking schools, small luxury accommodation, vineyard interpretation intimate tastings, story telling by local producers, festivals, conference facilities and art exhibitions.) 	<ul style="list-style-type: none"> • Wine industry • Tourism industry • Food industry • SATC • SATC • Travel Agents • Wine and Food Operators • Tourism Operators • Media • Wine and food operators • Tourism operators 	<p>Partially</p> <p>Partially</p> <p>Partially; but greater private investment required.</p>

LEVERAGE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
6.	Market Adelaide as an appealing destination for business events.	<p>Cities are judged on factors such as costs, airport accessibility, hotel quality, climate, transport and conference facilities.</p> <p>The business tourism market has become more sophisticated and competitive in recent years. Many Australian and overseas destinations have invested heavily in meetings, exhibition and convention infrastructure. Failure to address capacity issues now has the potential to stifle growth and the ongoing economic contribution of this high-yield tourism sector. South Australia would benefit from a more cooperative approach among key players.</p> <p>Although the Convention and Tourism Authority (ACTA) makes a substantial contribution to destination marketing, South Australia would benefit from a more cooperative approach among key players.</p>	<ul style="list-style-type: none"> • Business events in Adelaide to account for 14.5 per cent of the \$2.1 billion required to meet objective T1.15 of the South Australian Strategic Plan. • Adelaide to improve its ranking in the International Congress and Convention Association's (ICCA) annual global city rankings for the number of international association meetings held. • Increase South Australia's share of high yielding international conventions. 	<ul style="list-style-type: none"> • Initiate more cooperative marketing between the SATC, ACTA, The Adelaide Convention Centre, DTED and other providers involved in business tourism and marketing South Australia as a location for tourism, business and migration. Pool resources, exchange information and forge greater partnerships with major business tourism players to maximize marketing impact, particularly in international markets. • Upgrade the capacity of the Adelaide Convention Centre to ensure it is capable of winning larger convention bids. • Increase our ability to win major international conferences through an incentives fund initiated by the SATC, the Adelaide Convention Centre and ACTA. The great advantage of such a fund is that no expenditure is incurred if the event is lost. 	<ul style="list-style-type: none"> • SATC • Adelaide Convention Centre • DTED • Adelaide Convention Centre • SA Government • SA Government 	<p>Yes, requires reallocation of existing funds into more cooperative ventures.</p> <p>No</p> <p>No</p>

LEVERAGE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
7.	Build Adelaide's reputation as a global study destination to encourage greater visitation and regional dispersal.	Education is currently South Australia's fourth largest export, contributing \$673 million to the state's economy. As such, it also accounts for a significant slice of the state's \$4.2 billion tourism industry. Education is the only export industry with the capacity to position Australia as a clever country, fuel trade, build tourism, fill skills shortages and address population growth. Importantly, it is seen as a growing niche market opportunity for tourism principally through the development of study tour programs, friends and relatives tour packages, airline connections from source markets and employment for international students. Active pursuit of opportunities in this area will require collaborative initiatives by SATC, DECS, Education Adelaide, Inbound Tour Operators, education institutions and a core group of tourism suppliers.	<ul style="list-style-type: none"> • Increase the economic value of education tourism to \$2 billion by 2014. • Increase visitation, length of stay and expenditure of students visiting friends and relatives. • Increase number of ELICOS (intensive English language) providers in Adelaide and expand provision of existing institutions. • Increase numbers of international students attracted to South Australia for study tours. 	<ul style="list-style-type: none"> • Reinvest in the "Linger Longer" concept by creating packages and incentives for family and friends to visit students, stay for a holiday and explore the state. • Market South Australia as a tourism destination to international students via online social networks. Maximise marketing opportunities via User Generated Sites to talk directly to student based "communities of interest". Provide information about fun, engaging experiences in SA. SATC also to invest funds in key tourism target markets (e.g. India, China and Korea). • Grow visitor numbers in the ELICOS sector (specifically, in two week intensive English language study courses). Encourage entrepreneurial edu-tourism specialists to establish a presence in SA and provide easily accessible information for ELICOS students about touring options, including tourism linked study tour packages. 	<ul style="list-style-type: none"> • SATC • Education Adelaide • Travel Agents • Educational Institutions • Specialist travel agents <ul style="list-style-type: none"> • Education Adelaide • SATC <ul style="list-style-type: none"> • SATC • Education Adelaide • Specialist travel agents 	<p>Yes, requires reallocation of existing funds into more cooperative ventures.</p> <p>Yes, the bulk funded by Education Adelaide with some general marketing support from the SATC.</p> <p>Partially, but requires private investment.</p>

LEVERAGE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
8.	Make capturing the hearts and minds of visitors via authentic and powerful storytelling a point of difference in building South Australia's visitor experiences.	Interpretation is about helping people to love what you love – through awareness, understanding, appreciation and emotionalising the experience. South Australia's target audience travels to experience difference – these people want to immerse themselves in people place and culture. Often they'll recall specific stories when recounting their holiday experiences. Stories, well told, can be a point of difference in building advocacy for a destination. They improve the visitor experience, increase yield, grow repeat visitation and foster onward recommendation. South Australia boasts a strong political, social and religious heritage not to mention ancient and contemporary Indigenous culture and stunning natural and cultural landscapes and we should capitalize on this.	<ul style="list-style-type: none"> • Increase the number of operators that can demonstrate improvement in yield by participating in interpretive training. • Increase in level of visitor satisfaction on key tourism experiences. • Number of new infrastructure projects incorporating tourism content and appropriate and emotionally engaging interpretation. 	<ul style="list-style-type: none"> • Offer appropriate and site specific training for operators and stakeholders keen to value-add via excellent interpretation. Run professional development programs, such as those offered by Finders University; link interpretation training to brand coaching; and draw on the theatre sector. Create clusters of skilled experience-creating operators as champions who advocate and demonstrate improved yield through interpretation. • Develop interpretation plans for sites, locations and regions that dovetail with visitor interests and tourism marketing strategies. Encourage regional dispersal through connecting these stories. • Improve visitor experience on drive routes through key towns and tourism regions via excellent interpretation and maximizing use of new media and GPS technology. 	<ul style="list-style-type: none"> • New industry body • Educators • Tourism operators • Tourism operators • Business advisors (maybe through new industry body) • SATC • Local Government • Key players • Related industries e.g. Mining industry 	<p>No</p> <p>Partially but greater investment required</p> <p>Partially (New in partnership)</p>

ACTIVATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
9.	Make Adelaide and South Australia a destination that can be easily and affordably reached.	To a great extent, South Australia's success as an international tourism destination lies in the ability of consumers to begin or end their Australian journey in Adelaide. Airline access is therefore crucial to South Australia's prosperity, and the tourism industry must strive to remain competitive by supporting existing airlines and newly introduced services. This will become increasingly difficult if oil prices continue to rise. While South Australia benefits from its proximity to Sydney and Melbourne, we must continue to grow capacity to remain price competitive. Importantly, Adelaide is currently under-serviced by direct international flights when compared to Australian cities of similar size.	<ul style="list-style-type: none"> • Increase domestic passenger movements from 70,000 in 2007 to 100,000 in 2014. • Increase international passenger movements from 5,570 in 2007 to 10,000 in 2014. 	<ul style="list-style-type: none"> • Develop a long-term, orchestrated approach to international airline attraction through a State Aviation Working Group. Plan for targeted in-market visits by politicians with coordinated advice from government agencies and Adelaide Airport Limited, to build a united attraction campaign. • Work closely with domestic airlines to ensure key regional airports are serviced with direct interstate connections. (e.g. Pt Lincoln, Whyalla, Kingscote, Mount Gambier, Coober Pedy and Ceduna). • Act as "Charter Instigators" by establishing consortiums to operate charter flights for high-yield international visitors. Ensure there is marketing support from the SATC to sell the most appealing holiday experiences. 	<ul style="list-style-type: none"> • SATC • DTED • DTEI • Adelaide Airport Limited • Carriers <ul style="list-style-type: none"> • SATC • DTED • Regional Ports • Carriers • Mining and Defense industries <ul style="list-style-type: none"> • SATC • DTED • DTEI • AAL • Carriers • Inbound and Outbound Travel Agents 	<p>Partially</p> <p>Revenue from existing services can only fund incremental development to support normal growth.</p> <p>Indicative willingness to fund from SATC and private operators</p>

ACTIVATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
10.	Ensure consumer demand finds the points of sale that are best able to convert that demand into an SA holiday booking.	South Australia is a complex tourism product to buy, and the consumer prefers a variety of ways to purchase their travel products. SATC need not ensure that there are businesses across the spectrum of points of sale that know how to sell SA well, and then make sure that marketing messages refer consumers to those channels. Failure in this link in the distribution chain means SA is easily substituted for a competitive destination.	<ul style="list-style-type: none"> • Generate 20,000 consumer enquiries for a holiday to SA. • Achieve a 10% year over year increase in market share among distribution partners who champion South Australia. 	<ul style="list-style-type: none"> • Initiate cooperative marketing promotions with key distribution partners. • Develop the SA Visitor & Travel Centre into a fully functioning wholesale operation. • Train wholesale and retail agents who are committed to selling an 'unfair share' of South Australia. • Provide consumers with a choice of conversion paths to buy South Australia. 	<ul style="list-style-type: none"> • SATC • Tourism operators • Wholesalers • Travel agents • Online Travel Agents 	Requires reallocation of existing funds into more cooperative ventures

ACTIVATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
11	Create a single, strong industry body that leads operators to a sustainable tourism future.	Unlike most large industries, South Australian tourism is almost entirely (95 per cent) comprised of small to medium businesses. These businesses are diverse and dispersed across the state. This hinders the industry's ability to raise resources and represent its interests in a unified, impactful way. As a result, the industry is heavily reliant on the SATC to deal with almost all matters relating to tourism. This breeds, dependency, retards industry growth and places an "all things to all people" pressure on the SATC. Now more than ever, there is a call for the SATC to focus solely on development and marketing. South Australia needs a strong, independent body that can deliver training, business advice, address operator challenges and improve quality service standards. This organisation must have a critical mass of professional resources and, ideally, the ability to unite disparate industry groups. The opportunity exists to establish a positive and productive partnership with the SATC.	<ul style="list-style-type: none"> An independent industry body with high calibre board, professional resources and sufficient funding to be established by end of 2009. 7 per cent annual growth in accreditation, with majority of tourism businesses accredited by 2014. Establish new mechanism to monitor and track industry workforce development needs by the end of 2009. Increase tourism's reputation as an economic generator among corporate and community sectors. 	<ul style="list-style-type: none"> Create a single industry body with responsibility for the management of all industry initiatives, to unify and grow the maturity of the industry and create quality, consistency, professionalism, innovation and influence. Revisit proposals from the Minister's Round Table (e.g. tourism workforce, sustainability and facilitate implementation of critical recommendations with initiatives funded accordingly. (e.g. education program on climate change for operators.) Advocate a single national accreditation program that offers easy and affordable compliance and can be used as a consumer marketing tool. Ensure it incorporates opportunities for credible accreditation in the areas of environmental sustainability (climate change risk adaption and mitigation practices), visitor management in national parks and tour guiding. 	<p>Small and large industry associations SATC SATAB SATA</p> <p>New Industry Body</p> <p>New Industry Body SA Government SATC Tourism operators</p>	<p>Partially, through reallocation of existing funds.</p> <p>Partially but significant investment required on a project basis.</p> <p>Partially</p>

COMMUNICATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
12	Better communicate the best of what the target audience will buy.	South Australia has one of the lowest preference ratings of any state in Australia. One way to combat this is to better communicate with more impact the very best of what consumers are willing to buy. Done properly, this will stimulate increased consumer demand for SA's best holidays and experiences, and in turn fulfill a significant part of the \$6.3 billion tourism target. This is the role of effective communications – the right message, to the right audience through the right medium – to build preference and conversion to visitation. This can be done through the work of the SATC, or in cooperation with industry, national and international trade and media partners.	<ul style="list-style-type: none"> • Grow target audience consideration of SA to 25 per cent by 2014. • Increase our specific target market domestic visitors from 480,000 in 2007 to 750,000 in 2014. • Increase international visitor expenditure from \$334 million in 2007 to \$750 million in 2014. • Grow the SATC/industry cooperative advertising spend to more than \$1 million annually. • Target an audience of 90 million through advertising and PR reach. 	<ul style="list-style-type: none"> • Strive for the consistent, uniform promotion of a single brand message in all marketing across the state. Marketing should reinforce our brand values and core attributes through “promoting the best of SA” based on sound research. • Give operators more opportunities to work together and invest funds in cooperative advertising of packages to make an impression (i.e. impact rather than frequency). • Market SA holidays with a focus on Adelaide as a gateway to regional South Australia. As an industry, work cooperatively to reconsider the current approach to marketing regions and encourage more inter-regional activity based on experiences, not boundaries. 	<ul style="list-style-type: none"> • SATC • Tourism operators • SA Government departments • SATC • Tourism operators • Wholesalers • Travel agents 	<p>Partially</p> <p>Partially but greater private investment required.</p>

COMMUNICATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
13	Leverage partnerships that help us to reach the target audience with the most compelling message and offer possible.	SATC has a small media spend verses competitive destinations. We need to enlist the help of media partners and grade partners to combine our resources in order to present the strongest share of voice to the market place.	<ul style="list-style-type: none"> • 55% Ad recognition in Domestic Australia with target audience. • \$1 million in cooperative dollar leverage with partners. • 40% media value-add on top of nett media budget.. 	<ul style="list-style-type: none"> • Identify Distribution Champions – those that will sell an “unfair share” of South Australia – and create cooperative marketing opportunities with them. • Run fewer, larger marketing campaigns in order to leverage spend with media partners to deliver extra value. 	<ul style="list-style-type: none"> • SATC • Tourism operators • Wholesalers • Travel agents • Online Travel Agents • Media partners 	Yes, but requires increased funding to compete with share of voice from other destinations.

COMMUNICATE

	IDEA	RATIONALE	MEASURE	ACTIONS	PARTNERS	FUNDING
14.	Create a strategic network of exemplar online Visitor Information Centres that have a highly collaborative linked outlook.	The key SA tourism challenge lies in creating a more interesting experience for consumers to buy and developing a well-trained and highly motivated distribution system through which to buy it. Getting visitors to come to South Australia through a powerful brand message about these experiences is one thing. Ensuring they are well informed when they get here – in order to optimise their experience – is another. We must ensure SA is easy to research and book even at this stage of the visit. Visitor Information Centres have a key role in extending visitors' length of stay and spend. Extremely important is that these centres do not operate in 'silos', but see themselves as part of the big picture. That is, they are ready to refer visitors to other areas especially where its adds value to the SA story. This works both ways to create a bigger overall pie and satisfied visitor. VICs should be the 'in-field' access points for online communication.	<ul style="list-style-type: none"> • Increase in VIC patronage • Increase in on-line traffic (benchmark to be established on initiation of centres) • Conversion targets for strategic VIC staff. 	<ul style="list-style-type: none"> • Review Visitor Information Centres to determine the most strategically efficient network of centers. • Create one proto-type VIC that is set up for networking, referral to other attractions and acting as the signpost to the local and SA stories. • Realign existing visitor information centre to create network – all should be focused on adding to the visitor experience and up-selling South Australia. 	<ul style="list-style-type: none"> • SATC (Facilitator) • RTOs • Councils • Operators 	Yes, but realignment required

6. IMPLEMENTATION AND MONITORING

It's all very well to create a list of actions – we fully understand that turning great ideas into reality will require significantly more effort. But, as has been the case in the past, the South Australian Tourism Commission in conjunction with the industry is committed to constantly monitoring this plan and informing industry as we implement this ambitious plan of attack.

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

The plan can now be viewed on the SATC's corporate website (www.tourism.sa.gov.au), and this site will remain the primary source of information throughout the life of the plan. SATC Chief Executive Andrew McEvoy will email six-monthly updates to the agency's corporate database, while the plan will also feature in all editions of the SATC's *Industry Brief* newsletter.

Every meeting of the Minister's Tourism Round Table will include a progress report; the plan will be integrated into all regional tourism strategic plans; and a four-page update will be published annually to report on achievements, additional action items and issues of concern.

7. ACKNOWLEDGEMENTS

Consultation Process

The South Australian Tourism Commission (SATC) acted as facilitator for the preparation of the South Australian Tourism Plan 2009-2014.

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

Significant achievements in the past five years have included the re-branding of SA; the development of new events; the opening of Adelaide's new airport; increased international seat capacity; regional tourism funding; improved partnerships; more luxury product; increased accreditation; release of *Sustainable Tourism Package* and *Design Guidelines for Sustainable Tourism Development* and better use of new technology and online innovation within the SATC's promotional efforts.

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

- An absolute focus on the target of \$6.3 billion in tourism expenditure
- Greater industry accountability
- Clearer priorities and fewer strategies (i.e. the SATC will not attempt to be all things to all people)
- A clear definition of the plan's purpose and where it sits with other plans
- Clearer KPIs upfront
- Targeted and more efficient consultation
- Wider, external perspectives, and
- An upfront funding commitment for the implementation of key initiatives.

Preparation of the South Australian Tourism Plan 2009-2014 then began, with a comprehensive consultation process aimed at seeking tourism operator, stakeholder and government input. This process involved:

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

Contributors

Sincere gratitude and thanks to those individuals who generously offered their time and inspiration throughout the development of this plan. We particularly appreciate the time and effort taken by 200 respondents to our online survey, the 50 organisations and agencies, which put forward written submissions and those that participated in the workshops.

SOUTH AUSTRALIAN TOURISM PLAN 2009-2014

APPENDIX 1 – SUMMARY OF IDEAS FROM SUBMISSIONS AND WORKSHOPS

N.B. These ideas were submitted by individual tourism operators, business representatives, industry leaders and stakeholders throughout the consultation process. They do not necessarily represent the views of the South Australian Tourism Commission.

1. DEVELOPMENT

NO.	IDEA	NO. OF TIMES MENTIONED
1	SATC, DEH and other relevant agencies managing Crown land should implement a SA Landbank, supported by budget funding of \$2.3 million over four years to release 10 sites by 2013.	✓ ✓
2	SA has a huge resource of Vintage and Classic Motor Vehicles that should be packaged as an attraction and marketed to metro and regional car clubs.	✓
3	Need for more 5 star convention accommodation venues in regional areas, especially to attract business tourism. Incentive for investment may be instituted through gaming machines entitlements.	✓ ✓ ✓ ✓ ✓
4	Need to identify and develop key existing motels and caravan parks.	✓ ✓
5	The government should be more pro-active in awarding major project status to key developments.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
6	The planning review process should be streamlined and have a clear mandate to excise key areas from local approvals.	✓ ✓ ✓ ✓ ✓ ✓ ✓
7	Develop world-class visitor experiences in key national parks by establishing “can-do” partnerships between DEH, SATC and the private sector (e.g. product and accommodation via the establishment of a SA Landbank). SATC to work with DEH on the Visitor Management Strategy. Better interpretation and more saleable product at key sites. Natural attractions must be combined with the best facilities including local food, wine and interpretation. DEH should be provided with an enhanced capital works budget to deliver infrastructure projects over 2009-2014 and provide grants to licensed park operator applicants.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
8	Develop inter-regionally, and package the experience, so that food/wine, recreation and indulgence can all work together. The focus needs to shift from ‘product’ development to ‘experience’ development.	✓ ✓ ✓ ✓ ✓ ✓ ✓
9	The SA Government should invest in completing the landscaping and civil works on lands surrounding the Keswick Rail terminal to improve appearance for visitors. Cost equal to one year’s rent paid by GSR.	✓
10	Re-direct SE drainage scheme waters from exiting to the ocean back into the Coorong.	✓
11	Market experiences towards visitors of family and friends and provide an incentive (gift such as petrol voucher) for South Australians to take visitors touring into regional SA.	✓ ✓
12	More infrastructure to support KI and the Outback as visitor destinations.	✓
13	More 4-5 star accommodation in Mount Gambier – preferably a corporate accommodation company to increase competition and raise standards.	✓
14	A Geopark with a tree top walk for the Limestone Coast.	✓
15	Professional Tour Organisers to service the regions.	✓
16	Identify and develop 10-12 key regional events, which have the potential to draw really large crowds. Be more strategic.	✓ ✓ ✓

1. DEVELOPMENT

NO.	IDEA	NO. OF TIMES MENTIONED
17	Develop fruit and produce markets for aboriginal homelands.	✓
18	Creation of a new university in a regional area, for example heritage Barossa Valley University with a link via train to city (re open train line).	✓ ✓
19	Rebundle existing products and experiences into Wildlife – Outback – Wine ...WOW – the Australian Lifestyle State.	✓ ✓
20	Create a team of “A” operators across the State who are coordinated, packaged together and ready to invest in cooperative marketing with the SATC.	✓ ✓ ✓
21	Develop coastal food, wine and wildlife experiences on the Eyre Peninsula including seals/whales/tuna/seafood/wine celebrations...”blue tourism”. Baird Bay and Head of Bight need easier access. Establish a Chain of Bays Conservation and Marine Park.	✓ ✓ ✓ ✓ ✓
22	High end product is needed in the Fleurieu.	✓ ✓
23	Reclaim our “home of wine” moniker. Invest in food and wine tourism – be the Australian Leader and invest in the present to build on SA’s existing strength. SATC should find common ground with the wine industry and work together to promote tourism. Boutique and authentic wine tourism will appeal to high yield.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
24	Identify 5-6 signature developments and actively seek out investors and supply them with information. The opportunities should reinforce SA’s desired positioning. Provide these developers with some serious Government seed funding or a peppercorn rent on Government land for the first 20 years. Establish a Tourism Investment Fund and “Tourism Development Zones” and have a small board run it. Target super funds. Wales and Greece examples. Maximise opportunities for high-end tourism e.g. Seppeltsfield Winery site (just purchased), plus Emirates Airlines have openly stated their interest in developing more “super lodges” like the one in the Blue Mountains.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
25	Develop tourism experiences in Robe and if we had direct air access from Melbourne to Robe we could target the Melbourne market.	✓ ✓
26	Develop a water theme park for the family unit.	✓ ✓
27	Lobby Government to ensure that the high ground at Kingscote wharf is reserved for future tourism development. Also develop cruise boating around KI with land-based activities as well. Also upgrade the Penneshaw Ferry Terminal.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
28	Upgrade Adelaide City’s public realm e.g. complete North Terrace upgrade from Wine Centre to West End, develop Victoria Square (maybe a forest), master plan and develop the Torrens Precinct and Elder Park. We need a growth plan based on excellent high quality urban design. Design and build a major contemporary metropolitan art gallery on North Terrace and get current art works out of storage. Use the Royal Adelaide Hospital site to build a work class garden museum that connects Wine Centre to the rest of North Terrace.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
29	Continue to strengthen the partnership between National and Marine Parks and the tourism industry, particularly at the local level. Investigate opportunities to develop nature and coast brand values around the 19 Marine Parks.	✓
30	SA has nature-based experiences that could potentially be developed into Green Adventure, that we can claim to be iconic for SA. A comparative example is the development of bungy jumping in NZ has now become an iconic experience for NZ.	✓

1. DEVELOPMENT

NO.	IDEA	NO. OF TIMES MENTIONED
29	We need a fast ferry service from Adelaide to Kangaroo Island and one from Port Adelaide to Port Vincent.	✓ ✓
30	Build an eco-friendly Chair Lift from Adelaide to Mount Lofty. ESD design plus it must be accessible, fun, sense of adventure and connect with the Cleland Experience.	✓ ✓ ✓
31	Develop our metropolitan coastal experiences and design esplanades for more activity e.g. cafes, skate ramps, playground, art sculptures, coastal gardens. Build a roller coaster at West Beach to make this a family location tied to caravan park.	✓ ✓ ✓
32	Develop the lighthouse market site at Port Adelaide.	✓
33	Refresh, refurbish and invest more in existing hotels, particularly in Adelaide City and at Kingscote where properties are not making enough money to meet consumers' modern expectations. Also develop more iconic hotels in Adelaide and relevant areas.	✓ ✓ ✓ ✓ ✓
34	Work with DTED to ensure the recommendations of the Planning Review are implemented such that the system is more receptive to new tourism development proposals.	✓
35	Develop organic tourism experiences e.g. Temple Bruer Wines in Langhorne Creek.	✓ ✓
36	It is important that development of 4-5 star accommodation is aspirational; is an integral part of the experience; and achieves excellence in design and emotive response. It is crucial that SA's Development Plan facilitates sustainable accommodation and value adding development, where ambience is created through the connection with the attraction.	✓
37	Increase the range of SA's innovative wine and food experiences through unique dining, gourmet retreats, specialised winery, vineyard and producer tours, intimate tastings and exclusive, personalised experiences, festivals and events and wine & food trails.	✓
38	Develop the one brand for a network of coastal parks – brand all 19 Marine Parks into an entity such as the Great Barrier Reef. Or brand a group such as the Chain of Bays Conservation and Marine Parks (Baird Bay, Sceale Bay, Searcy Bay).	✓ ✓
39	Adopt the recommendations in the Adelaide City Council's Tourism Action Plan to be released in 2008, particularly in regard to cycling, walking, cultural interpretation, public art and signage.	✓ ✓ ✓ ✓
40	<p>Develop a menu of options to help mitigate risks tailored appropriately to the types of development. This could include:</p> <ul style="list-style-type: none"> • Funding infrastructure (particularly alternative technologies) • Providing grace period on taxes and charges in order to establish positive cash flows • Acting as a guarantor to lending • Assist the industry in the training of and retention of staff in remote areas (e.g. argue for income tax benefits for workers in the tourism industry in remote areas). 	✓ ✓ ✓ ✓ ✓ ✓

2. ACCESS

NO.	IDEA	NO. OF TIMES MENTIONED
1	Demonstrate how SA is an easier landing point than for example NSW and VIC as there is less customs hold up, quicker baggage, quicker access to city hotels etc.	✓
2	New international direct air access destinations should include Bali, Kuala Lumpur, Dubai, Bangkok, Vietnam, India, Los Angeles, Japan, South Africa, Shanghai, Guangzhou.	✓ ✓ ✓ ✓ ✓ ✓ ✓
3	New domestic direct air access destinations should include Uluru, Broome, Launceston, Kalgoorlie, Newcastle and Townsville.	✓ ✓ ✓
4	New regional direct air access destinations should include Pt Lincoln, Whyalla, Kingscote, Mount Gambier, Coober Pedy, and Ceduna. Need 4 x 2000 metres runways at regional airports with supporting infrastructure to draw visitors to these destinations. Note: Revenue from existing services can fund incremental development required to support normal growth. There is no SA Government source of funding for major airport development (infrastructure and security costs).	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
5	Review the future requirements of our major regional ports to meet infrastructure demands with new generation aircraft and increased services.	✓ ✓ ✓
6	Promote existing access, for example there is already an existing direct flight from Melbourne to Mt Gambia.	✓ ✓
7	Consider major promotional campaigns interstate and overseas to position Adelaide as a major gateway.	✓
8	More regular regional bus touring services e.g. from Melbourne to Adelaide and leverage the Melbourne-Adelaide tourism route success, and Ceduna – Pt Lincoln and to the Outback.	✓ ✓ ✓ ✓
9	Continue significant Government spending on incentives for new carriers.	✓ ✓
10	Remove or relax the curfew at Adelaide Airport to improve scheduling of connections.	✓ ✓ ✓ ✓
11	Develop a metropolitan airfield external to Adelaide City; a second base for a low cost carrier. Aim for a low cost carrier base in SA.	✓ ✓ ✓
12	Develop a whole of government /private freight strategy that results in more inbound air freight.	✓
13	Aviation Working Group to develop a long term orchestrated approach to international airline attraction. It should be supported by disciplined and targeted in-market visits by politicians and coordinated advice from government departments/AAL so that SA speaks with one voice.	✓ ✓ ✓ ✓ ✓ ✓ ✓
14	Update the Adelaide Airport in line with AAL infrastructure masterplan.	✓ ✓ ✓
15	Be “Charter Instigators” – establish a private consortium to operate to/from China – a China Eastern charter over the next two years. This needs leadership from outbound to fill other direction and marketing support from SATC. SATC intervention in to China should be with willing partners to get high yield.	✓ ✓ ✓ ✓
16	Develop aerodrome facilities in places like the Clare Valley to attract time poor international visitors.	✓
17	Upgrade key tourist roads in the regions to improve access and safety. Adopt a statewide strategic approach.	✓ ✓ ✓ ✓ ✓

2. ACCESS

NO.	IDEA	NO. OF TIMES MENTIONED
18	Reduce access cost to KI by achieving national Highways status similar to Tasmania and dispense with state wharfage tax.	✓
19	Move the terminal for interstate trains into the Adelaide Railway Station.	✓ ✓ ✓
20	State Government to lobby Federal Government to improve border and quarantine processing. Implement a risk management approach to quarantine inspection. Introduce "Express Paths".	✓ ✓
21	Reassess the "regional" designation under the current Open Skies Policy.	✓
22	Develop a measure of the economic impact of the aviation industry.	✓
23	Promote luxury houseboats on the River Murray.	✓
24	The SA Government's investment in tourism infrastructure should be doubled.	✓
25	The SA Government abolish stamp duty on airline insurance.	✓
26	Introduce a ferry subsidisation scheme for KI.	✓ ✓ ✓

3. DISTRIBUTION

NO.	IDEA	NO. OF TIMES MENTIONED
1	Develop a FREE e-zine centre (as part of SATC website) where a potential visitor can seek 'ideas' and receive a free PDF file of detailed experiences in SA that match their interests.	✓
2	Produce a quarterly e-newsletter highlighting events, shows, plays, festival etc. and sent to wholesalers, ITO's and SATC reps so that when clients plan to visit SA, they have prior knowledge.	✓
3	Use blogs as a way to stay informed about consumer feedback.	✓ ✓
4	Use Online Travel Agents and choose partners that will have a good strategic fit with SA product. Control of message and image should reside with SATC. Piggy-back on successful internet distributors such as lastminute.com.	✓ ✓ ✓ ✓ ✓
5	Find a short haul emerging market and match operators to it and allocate SATC resources to make that market a red hot success.	✓
6	Reduce the number of international markets that the SATC invests in and just focus on sustained opportunity in a few.	✓
7	More packaging; present more ready-to-market experiences to the trade.	✓
8	Rethink the role of VICs. Include VICs as access points for online communication. All VICs should have ability to book product online. VIC staff need to have greater knowledge of the wider regional area and neighbouring regions so that they can "on-sell". Train staff to promote sales.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
9	More packaged product that will appeal to older people travelling for intimate, luxurious and boutique experiences – wealthier society who want to satisfy themselves in personal ways.	✓ ✓
10	Work online with "communities of interest" and share knowledge and experience of SA to sell aspirational, personalised and customised holidays (e.g. like trip advisors). Target User Generated Sites (UGSs) and consumer blogs.	✓ ✓ ✓ ✓
11	Establish mobile phone company partnerships - they have a huge user base, retail outlets etc that tourism can capitalise on.	✓ ✓
12	Launch an SA Wholesale Operation and in the longer term launch a SA wholesale distribution channel into Singapore and NZ .	✓ ✓ ✓
13	Create and run online courses with competition prizes for delegated travel agents so that they build knowledge of SA product e.g. such as "Discover West Specialist", "Las Vegas Know-It-All" or South Africa "Fundi courses.	✓
14	Double SATC's investment in PR and VJP.	✓ ✓ ✓ ✓
15	Pick a limited number of right online distribution partners and do something cutting edge with mutual rewards for both parties. May be external to tourism and travel industry e.g. wine.	✓ ✓ ✓
16	Change ConnectSA to subscription rather than commission.	✓
17	Run an education program for operators about online distribution.	✓
18	Make commissions performance based.	✓
19	Target executives from the mining and defense industries with luxury packaged product e.g. The Louise, SOL, Atrium at Greenock Creek, Outback encounters.	✓
20	Bundle the best of South Australia's food and wine tourism opportunities with relevant SATC marketing and on-line marketing material for coastal, nature-based, recreation, arts & culture and accommodation holiday packages / experiences.	✓
21	Put more money into marketing to the short haul destinations and limit to one or two markets.	✓

4. COMMUNICATION

NO.	IDEA	NO. OF TIMES MENTIONED
1	Brand awareness is still an issue; There needs to be consistent and uniform promotion of a single brand and message. There also should be a single 'story' for the state, SA's "unique selling proposition", with each of the regions providing 'chapters' that link and support the bigger picture. Work with DTED to develop state branding that encompasses sustainability issues and capitalizes on SA's achievements and the State's nature based experiences.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
2	Develop a range of industry 'champions' who share their travel/tourism experiences in the media.	✓
3	Educate operators about marketing plans, consistent with the State marketing plan, assisting in business plan development incorporating marketing plans, brand definition and consistency of service, product and message.	✓ ✓
4	All marketing managers should under go the same accreditation process to ensure decisions being made are viable for all regions.	✓
5	Develop sustainable quality assurance for all products marketed and only promote quality assured products.	✓
6	Industry operators must combine more and invest in cooperative marketing of packages to make an impression.	✓ ✓ ✓ ✓ ✓ ✓ ✓
7	Provide in-flight and in-room information videos.	✓ ✓
8	Consider a top ten experiences book.	✓
9	Enact or support PR that is not just travel or tourism related.	✓ ✓
10	Stop wasting money promoting SA through SA media.	✓
11	Produce an events e-book that can be sent to trade and potential visitors and updated weekly.	✓
12	Focus marketing on Adelaide City – package up "city and the surrounds" and market holidays not regions. Adelaide should be central to any cultural tourism initiative.	✓ ✓ ✓ ✓ ✓ ✓ ✓
13	Capitalise on Baz Lurhmann's Australia movie.	✓ ✓
14	Produce only one Visitor Guide for the State instead of 12 separate ones. Marketing of the regions needs to change.	✓ ✓ ✓ ✓ ✓
15	Encourage South Australian's to love and sell SA proudly.	✓ ✓ ✓ ✓
16	SATC marketing collateral to include information about business tourism (including on its website).	✓ ✓
17	A marketing campaign should be developed to inform the community that the Murray is open for business, stimulating business for tourism operators.	✓ ✓
18	Encourage the State Satellite Account to be produced yearly.	✓
19	Adopt a PR led approach for China.	✓
20	Make the most of the opportunity that Tourism Australia's Natural Landscapes Program brings South Australia.	✓
21	Other industries have been in China and India for longer than the SA tourism industry and have learnt it's not about volume; instead focus on high yield and what appeals most. Get to these markets with impact not frequency and offer them what the research tells us is most appealing.	✓
22	Invest in, and leverage the "festival state" brand.	✓
23	Stay honestly focused on our real strengths as identified by research. Pick the winners, promote aggressively what we have now better, and develop more appealing product.	✓ ✓ ✓ ✓ ✓ ✓ ✓

5. EVENTS

NO.	IDEA	NO. OF TIMES MENTIONED
1	Encourage private enterprise to sponsor a marquee which could accommodate 2000 people under cover- most problems with country events involve the weather.	✓
2	When events are on such as the Adelaide Festival or the AFL, promote the regions on the way, as many eastern state visitors drive over.	✓ ✓
3	Identify and develop 10-12 key regional events, which have the potential to draw really large crowds. (some near regional mining centres). Need to streamline and combine some regional events – it's about quality not quantity. Regional Festivals and Events funding from SATC needs to be more strategic and support events that underpin the brand.	✓ ✓ ✓ ✓ ✓ ✓ ✓
4	Combine and promote the various regional wine festivals.	✓ ✓ ✓
5	Grow and develop WOMAD.	✓ ✓
6	Develop the SALA festival that is held in August.	✓ ✓
7	Develop the Penola Coonawarra Arts Festival.	✓
8	Liaise with operators to develop pre and post event touring packages. Make sure the packages are well targeted. Maybe include a “buddy” to help with personalized visitor planning.	✓ ✓ ✓
9	Develop a river festival.	✓ ✓
10	Develop a Children's Festival by combining Come Out and the Pageant and creating new ideas for families - include a grandparents' day.	✓ ✓
11	Create a 5 course professional golf championship across 5 country golf clubs in SA with substantial prize money.	✓
12	Produce an events e-book that can be sent to trade and potential visitors and updated weekly.	✓
13	Achieve a better spread of events throughout the year. We can learn a lot from Melbourne's tourism model, such as tennis in summer, V8s in Autumn, exclusive arts/theatre in winter and racing carnival in spring. Reschedule some indoor events to quieter times May- September e.g. Entertainment Centre, Royal Showground. Regular celebration points in the cultural calendar would assist.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
14	Further grow the TDU with communities and build a cycling tourism culture. Promote Adelaide City as a great place for cycling (e.g. free bikes as part of the Adelaide City Bikes Scheme) and scootering.	✓ ✓ ✓ ✓ ✓ ✓ ✓
15	The Adelaide Festival and Fringe Festival are iconic and should be given support because they have a global market.	✓ ✓ ✓ ✓
16	Develop Laura Folk Festival.	✓
17	Package “Day on the Green” to add value to the event.	✓
18	Develop the Arts Up West Coast Festival.	✓

5. EVENTS

NO.	IDEA	NO. OF TIMES MENTIONED
19	Create a "Clean and Green" Festival for the State.	✓
20	Encourage SANFL and SACA to forgive and forget their quarrels and agree to invest the \$300m in an upgrade of the Adelaide Oval (plus money from sale of AAMI) and you'd get one world class city based sporting facility in the heart of Adelaide.	✓
21	Build our multicultural events like Canevale and Glendi.	✓
22	Develop aspects of the Royal Show that will appeal nationally e.g. competitions.	✓
23	Keep the Northern Lights as a permanent attraction.	✓ ✓
24	Tasting Australia is South Australia's highest profile wine and food tourism event with a current focus on trade and media. South Australia should attract more of our domestic target visitors by focusing on its tourism appeal and adding regional value to this event.	✓
25	The World Food Exchange can be leveraged to show that South Australia is not just the home of Australian wine, but also one of the finest, most authentic and environmentally sustainable culinary destinations in the world.	✓
26	Develop a South Australian Regional Produce Showbag to be sold at the Royal Adelaide Show.	✓

6. BUSINESS TOURISM

NO.	IDEA	NO. OF TIMES MENTIONED
1	More co-operative marketing between SATC, ACTA, the Adelaide Convention Centre, DTED and other providers involved in business tourism and marketing SA as a location for tourism, business, migration etc. Pool resources and forge greater partnerships with major business tourism players to maximize marketing impact.	✓ ✓ ✓ ✓ ✓
2	Better education about the State's business tourism capabilities for interstate and overseas tourism operators promoting SA.	✓
3	Better education and marketing material for SA's representative offices overseas.	✓
4	Participation by South Australia in the development and delivery of the new national business events marketing strategy announced by the Federal Minister for Tourism in May 2008.	✓
5	Find or create an iconic conference every year that attracts publicity and lifts our profile. Consider a specialist defense fair to rival Pacific 2008/09.	✓ ✓
6	Need for more 5 star convention accommodation venues in regional areas, especially to attract the business tourism.	✓ ✓ ✓ ✓
7	Have the conference experience begin at the airport by welcoming visitors and engaging them in the city.	✓
8	Work with mining, defense and education industries to build business tourism.	✓ ✓ ✓
9	Package up integrated experiences for business travellers. This should include the development of event-related packages to encourage business visitors to stay longer.	✓ ✓
10	Forget about conferences in December. Market convention facilities as ideal for Christmas functions to be held by SA and interstate businesses.	✓ ✓
11	Undertake a major extension of the Adelaide Convention Centre to upgrade size capacity.	✓ ✓ ✓ ✓
12	Increase ACTA's funding. Also increase the incentives fund (from 120k to 500k) initiated by SATC, the Adelaide Convention Centre and ACTA to attract larger business events to SA. The great advantage of such a fund is that no expenditure is incurred if the event is lost.	✓ ✓ ✓ ✓ ✓
13	Prepare a statewide venue infrastructure strategy.	✓ ✓
14	When bidding for convention push home the add-ons and highlight the free museums, botanical gardens etc.	✓
15	Ensure events and business conventions/conference are carbon neutral. Satchels of paper products should be replaced with USB sticks.	✓ ✓
16	Do not ignore business events - they are a high yield component that will help us reach the target.	✓ ✓ ✓

7. INDUSTRY CHALLENGES

NO.	IDEA	NO. OF TIMES MENTIONED
1	There is value in bringing the management of all industry initiatives under one independent industry body as it creates quality, consistency, support, professionalism and innovation. If one body were created, SATC could be used for knowledge and support. All industry associations could join together. Any new industry body would need to have a regional presence and be appropriately resourced.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
2	More traineeships with on the job learning are vital. The new industry body should work with High Schools and TAFE to better promote career options and jobs in SA. Move from the notion of “training for business” to “training within business”.	✓ ✓ ✓ ✓ ✓
3	Establish a mentoring program for young workers in the tourism industry to prevent trained workers opting out of the industry. Inspire them with all the good things that are happening in tourism and why it’s a great industry to work in.	✓
4	More industry support of VET education courses at secondary and tertiary levels.	✓ ✓ ✓ ✓
5	Rather than offer a carbon off-set scheme of un-seen tree plantings we should give consideration to developing a highly visible carbon off-set scheme with direct pay back to a visible and widely known problems - River Murray flow, salinity, purchase of land for national parks (NTPI) etc.	✓ ✓ ✓
6	Run an education program in climate change for operators and encourage them to push “green” practices in their marketing. Develop green tick packages rather than products. Ensure operators measure their carbon footprint (embodied emissions of goods and services throughout the whole life cycle) and embrace carbon footprint labeling. It is very important to choose credible methodologies and systems that are internationally recognized to demonstrate green performance. Government should invest in a grants or incentive scheme to assist industry to change infrastructure and practices and begin with a focus on efficiency gains e.g. pay for an online audit/measure of carbon emissions, water saving shower heads, recycling of water and waste and any other practical example of environmental sustainability.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
7	Ensure national accreditation of tour guides. This will ensure consistently high standards of presentation and information.	✓ ✓ ✓
8	Promote excellence within the industry through incentive programs that support operators who are actively investing in international markets.	✓ ✓
9	Emerging markets like India and China require changes to menus, signage and higher service standards etc – use a student for translation	✓
10	Implement proposals from Minister’s Round Table on workforce planning, regional investment, climate change and Winter in Adelaide. The new tourism industry body should play a key role and be funded accordingly.	✓ ✓ ✓ ✓ ✓ ✓ ✓
11	Address the concerns of the wine industry with regard to licensing, permits and signage and better promote DTED’s guidelines on overcoming such regulatory issues. Any new industry body should work closely with DTED e.g. they have a guide for starting a café, restaurant or take-away.	✓ ✓

7. INDUSTRY CHALLENGES

NO.	IDEA	NO. OF TIMES MENTIONED
12	Remove Capital Gains Tax on home based accommodation with less than 5 rooms	✓ ✓
13	Abolish land tax for all tourism operators.	✓ ✓ ✓
14	Legislate to ensure private holiday homes are subject to inspections, accreditation and a code of practice to ensure a level playing field with BnBs and other tourist accommodation. Address the practice of illegal letting of residential accommodation.	✓ ✓ ✓ ✓
15	Improve the quality of service provided by hire car companies.	✓
16	Ensure operators can use research in practical ways, instead of providing the “big picture” all the time. Research into the impact of climate change on tourism consumers is needed.	✓ ✓
17	Target backpackers for short term tourism jobs in the regions. SATC and DTED should work together to increase working holiday maker attendance to SA. In particular target the New Zealand market with a major promotional campaign because they have unrestricted work opportunities.	✓ ✓ ✓ ✓ ✓
18	Regional Development Boards should run professional development workshops for operators.	✓
19	A national tourism accreditation scheme. Currently there are too many accreditations. Need to address poor customer service standards. Build workforce planning practices into National Accreditation.	✓ ✓ ✓ ✓ ✓ ✓ ✓
20	Drought assistance packages should be extended to include the tourism industry, and tourism industry should be represented in drought-related taskforces.	✓
21	Bring the costs of caravan and camper registrations in SA in line with neighbouring states.	✓
22	Abolish the burden of payroll tax on labour intensive industries such as tourism or provide an exemption to the tourism accommodation sector.	✓
23	Along with pursuing accreditation to help guarantee quality wine and food experiences, business understanding and professionalism should be improved through commitment to acquiring cellar door metrics, benchmarking and trend data (on-line).	✓
24	Engage relevant government agencies to identify ways to support the tourism industry along the Murray River.	✓
25	Revisit the recommendations of the Tourism Industry Workforce Development Strategy to ensure funding is available to address tourism skills shortages now and in the future.	✓ ✓
26	Run an education program for operators about online distribution.	✓

8. EDUCATION TOURISM

NO.	IDEA	NO. OF TIMES MENTIONED
1	Create special packaging and incentives for parents to visit students rather than return home (get out and explore the state) and provide easily accessible information for international students about touring options on SATC, Education Adelaide and institution websites.	✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓ ✓
2	Build advocacy amongst students; establish and support Touring Clubs at the university and colleges, and conduct presentations to new students on the tourism attractions of the State. Provide information packs to give to their families.	✓ ✓ ✓
3	Create a new university in a regional area, for example heritage Barossa Valley University with a link via train to the city (re open train line).	✓ ✓
4	Identify new opportunities in countries that Australia has Working holiday visa agreements with (example Belgium, Canada, Cyprus, Denmark, etc).	✓
5	Educate the community about the benefits of having international students in our State.	✓ ✓ ✓ ✓ ✓
6	Undertake some research with international students and ask them where they want to go and what sort of service and infrastructure they want.	✓ ✓
7	Target international carriers to support education tourism e.g. SE Asia, the Middle East, China and India.	✓ ✓ ✓ ✓ ✓
8	Link with student housing providers to develop opportunities for student housing to be made available for visiting friends and relatives.	✓
9	Better harness SA's mix of cultural associations to promote education and tourism including opportunities for home hosting of visiting family and friends.	✓
10	Attract visitors through graduation/orientation activities and ceremonies.	✓
11	Market SA as a tourism destination to international students via online social networks. Maximise marketing opportunities via User Generated Sites (social networking) and market direct to student based "communities of interest" that are using social networking sites. Give them information about fun and engaging experiences in SA.	✓ ✓ ✓
12	Address once and for all the issue of access to alumni databases and improve overall cooperation and sharing of information amongst SATC and major educational institutions.	✓ ✓ ✓
13	Education Adelaide and DTED should work collaboratively to promote SA to students to encourage migration of skilled migrants.	✓
14	A discount travel card for visiting students while in SA.	✓
15	Get a private operator to develop touring packages for school children and promote to schools with some subsidy from the Education Department.	✓
16	Help address tourism workforce shortages by providing paid employment to students while in South Australia, including opportunities in regional hospitality and translation services. Advocate amendments to the Migration Act to extend Student Visas to allow them to work in Australia.	✓ ✓ ✓
17	Ensure promotional material is located in Migration and Visa Offices in key overseas markets.	✓

9. CULTURAL TOURISM

NO.	IDEA	NO. OF TIMES MENTIONED
1	Give operators and other stakeholders the training they seek to improve their capacity to create value-added experiences via excellent interpretation. Encourage participation in sustainable tourism experiences by using interpretation techniques as a basis. Run professional development programs, such as the Interpretation course offered by Flinders University	✓ ✓ ✓
2	Develop a South Australian History Centre.	✓
3	Need a strategy to ensure that there is ongoing investment and upgrading of key interpretive centers to keep abreast of technology and consumers expectations. Improve visitor experiences on key drive routes in the best towns and tourism nodes via excellent interpretation, which makes best use of new media and GPS.	✓ ✓ ✓ ✓
4	Greater programs are needed at a state level in order to ensure that interpretation of aboriginal tourism experiences are market ready. Look at mentoring programs (e.g. Maori interpretation through all aspects of the NZ 100% Pure campaign. Improve interpretive signage in indigenous areas (e.g. Bunyip Trail by the Koolunga People) and other key historical sites and key locations.	✓ ✓ ✓ ✓ ✓ ✓
5	Revamp the Whale Centre at Victor Harbour.	✓
6	Create a series of e-books for marketing that tell regional stories.	✓
7	Tell the story of the drought and use it as an advantage e.g. desert sunrise with a huge rolling cloud of dust and dirt, explain what's happening to the Murray	✓ ✓
8	Fund the Mountains of Memory project in the Flinders.	✓
9	Images and scientific research should be used to tell the stories.	✓
10	Establish a major Aboriginal Interpretive Center along the Torrens River using SA museum resources.	✓
11	Extend the Central Market opening hours	✓ ✓ ✓
12	Develop the Murray River further and make sure people know about its natural beauty and history. The Cliffs that have been around for centuries and reflect our history (old ancient sea beds), the aboriginal culture, and the towns that line the river. Obtain National Tourist Trail status. Consider financing projects like the Mid Murray Meander and the Mt Bryan Expedition Trail.	✓ ✓ ✓
13	Develop a Cultural Tourism Plan with an "action plan" component.	✓
14	Increase the rate of projects approved for tourism infrastructure grant funding that have interpretation as a component - as opposed to non-interpretation projects.	✓ ✓
15	Could possibly develop a bank of people who would be happy to take part in a "meet the expert/artist". It could be advertised with the International Wholesalers or ITO's. The visitors can be offered this option well in advance and book a time with the expert, whether it is in their home, studio, coffee or a tour.	✓
16	Find some connections in the theatre industry who can bring their talents to bear on interpretive experiences which in the past have usually been handled by museum-trained consultants or even architects. A theatre director is the creative director for the Blinman Mine experience and is advising on the Pichi Richi Railway experience, for instance.	✓
17	Involve the local industry in interpreting national and marine park resources into sustainable visitor experiences. Develop formal links with local area operators – including through the LGA.	✓
18	Develop a nationally recognised Indigenous Showbag to be sold at events and international airports and used for educational purposes.	✓
19	Develop a "cultural calendar" by anchoring it in our four seasons – go with nature and climate.	✓

20	Play with our "city of churches" by exploiting its true meaning – freedom of expression and city of diversity.	✓
21	Develop the capacity of the State's interpretive centres and museums to serve as tourism gateways both in their content and their market-readiness.	