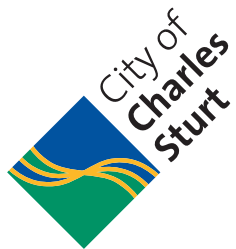


Western Adelaide Tourism Alliance Tourism Destination Action Plan 2024

Prepared by: Western Adelaide Tourism Alliance Committee Members, August 2022.



Traditional Owners

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

Message from Council CEOs

In 2015, the Chief Executive Officers and key staff from the Cities of Charles Sturt, Holdfast Bay, Port Adelaide Enfield and West Torrens signed a Memorandum of Understanding (MOU) to create a tourism alliance encouraging regional collaboration and cooperative economic development.

One of the key actions was the development of the Western Adelaide Tourism Alliance (WATA) Tourism Destination Action Plan (TDAP) 2016 – 2020. This aims to increase visitation and tourism expenditure in the Western Adelaide region, which in turn will encourage growth in local employment and strengthen the cooperative relationship between the four cities.

The TDAP recognised the benefits of a collaborative regional approach to promote and develop tourism products and initiatives. The intent of this plan was to provide an updated strategic approach and action plan to guide the growth and development of the visitor sector of the Western Adelaide region.

Due to the COVID-19 pandemic, much of the tourism landscape has changed since 2020. However, with state and international borders now open and unrestricted, visitors in large numbers are able to travel freely once more. As we start to enjoy this post-COVID scenario, a revised TDAP is necessary to ensure a more resilient and agile visitor sector moving forward.

With enthusiasm for projected growth in visitor numbers and expenditure within the Western Adelaide region during the next 2 years, this new TDAP will support the visitor economy of until the end of 2024.



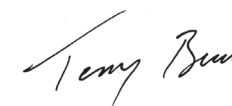
Paul Sutton
CEO – City of Charles Sturt



Roberto Bria
CEO – City of Holdfast Bay



Mark Withers
CEO – City of Port Adelaide Enfield



Terry Buss ASM
CEO – City of West Torrens



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Executive summary

The Western Region Tourism Development Action Plan (TDAP) 2024 identifies and promotes key tourism assets and experiences, e.g. beaches, vibrant public places, leisure activities, heritage and cultural places, nature and wildlife, museums, art galleries and eateries.

The TDAP aims to increase visitation and tourism expenditure in the western region, which encourages growth in local employment whilst improving the connectivity between the four cities.

The new TDAP 2024 follows from the TDAP 2020 launched in 2016, which has now reached the end of its life cycle. It will continue the strategic direction for the destination management and marketing of the Western Adelaide region. The TDAP was due to be updated during 2020 but was delayed due to the COVID-19 pandemic. The 2024 time horizon has been retained to keep in alignment with relevant state and federal strategies.

The vision for this Plan is to position the Western Adelaide region as a must-visit destination for all visitors travelling to Adelaide and around South Australia. The primary goal is to capitalise on increasing visitation, leading to higher economic gains and increasing sustainable tourism jobs within the region. Measurable objectives will be put in place that will support the achievement of these primary goals and overall vision.

Regional issues identified in the TDAP 2020 which are still relevant in 2022 include:

- Lack of centralised resources and funding to market the region.
- Low awareness level of the range of experiences that the region offers.
- Lack of understanding of the visitor economy and importance.
- Lack of centralised communication.
- Varying levels of maintaining infrastructure.

By setting realistic goals this Plan, once implemented, will enhance the visitor economy of the Western Adelaide region by:

- Ensuring confident and consistent marketing activities to drive targeted demand.
- Setting a framework for industry stakeholders to better communicate and collaborate, creating an engaged and informed professional community.
- Improving our understanding of the current state of the visitor economy within the region, our target markets, product gaps and opportunities.
- Ensuring that the visitor economy is still regarded by all stakeholders in each municipality as a critical, sustainable economic driver for the region.

Developing new and innovative products and experiences and refreshing existing ones will attract first time and repeat visitors. To attract visitors, several attributes of South Australia have been identified that are particularly important for Western Adelaide:

- Good food, wine, breweries and distillery offerings, distinctive dining and fresh regional produce.
- Coastal and beach experiences including the Cruise Market (aligned with the SATC Cruise Ship Action Plan 2025).
- History and heritage / arts and culture are a substantial opportunity for Western Adelaide; this Plan is aligned with the new SATC Arts and Cultural Tourism Strategy 2025.
- Availability of 4 - 5-star (premium) accommodation.
- Unique experiences not offered anywhere else.
- Fostering current and new events that can drive tourism demand to the region.
- Aboriginal tourism product and experience and multiculturalism align current and future products and experiences with the new SATC Aboriginal Tourism Action Plan 2025.



Setting the scene

Western Adelaide – a metropolitan, regional tourism destination

The Western Adelaide region has a solid history-based tourism industry, with Port Adelaide home to some of South Australia's most notable heritage transport and marine assets, and Glenelg the proclamation site for South Australia. The region boasts a pristine 22-kilometre coastline and three lake/river systems offering an extensive array of water-based and related activities and tours to nature and aquatic experience seekers.

Inland, the region is home to a collective of high-quality sporting and shopping precincts and major transport and travel gateways, including Adelaide Airport, Outer Harbor Passenger Terminal (cruise market) and the Adelaide Parklands Terminal (rail).

To add to this, the region is a multicultural melting pot of dining experiences for all occasions and traveller tastebuds. Some of Adelaide's best restaurants are dotted along the coastline, inner western suburbia, Henley Beach Road and Henley Square.

Western Adelaide Tourism Alliance (WATA)

The Western Adelaide Tourism Alliance (WATA) comprises the four metropolitan councils that geographically encapsulate the main coastline and inner western suburbia of Adelaide: the Cities of Holdfast Bay, Charles Sturt, West Torrens and Port Adelaide Enfield.

Since 2015, the four councils have been committed to working collaboratively on key economic projects to develop opportunities to benefit the Western Adelaide communities. Between the four councils, the WATA brings together people with extensive knowledge and experience in tourism, business, economic development and communications.

What is the WATA Tourism Destination Action Plan (TDAP)?

The Western Adelaide Councils recognise the importance of tourism within their planning frameworks, and the TDAP 2024 articulates the shared vision and links to the State and Commonwealth plans for growing the visitor economy. The visitor economy encompasses tourism's contribution to employment, investment, infrastructure development, exports, provision of temporary labour and social vibrancy. This is the second TDAP that the WATA have prepared.

Results of the WATA TDAP 2020 and the effects of the COVID-19 pandemic

Within the TDAP 2020, the WATA committee agreed to the following objectives:

1. Increase awareness of the region.
2. Increase visitor numbers, expenditure and repeat visitation.
3. Improve dispersal and participation of key tourism assets.
4. Increase the number of sustainable tourism jobs.
5. Increase infrastructure investment.
6. Build on existing unique features.
7. Identify unique experiences, events, and products.
8. Influence policy and legislation to benefit the tourism industry.

In December 2019, tourism within the Western Adelaide region directly employed 9,945 people, supported 4,421 businesses, and tourism expenditure was valued at \$677million (Remplan 2019). Within four months, the COVID-19 pandemic took hold of Australia, impacting businesses, and our community, closing state, territory and international borders.

Throughout 2020, Australia's tourism industry suffered many setbacks as a result of these barriers and it is currently in a rebuilding phase. Considering that we are still enduring the effects of the COVID-19 pandemic, it is an uncertain time to create any plan other than a recovery strategy to achieve pre-pandemic successes.

The South Australian visitor economy has seen a severe reduction because of the COVID-19 crisis of 2020. While we have already seen significant drops when comparing the current results (year to December 2021 figures from TRA) to the 2019 calendar year, there has been a resurgence in visitor numbers and spending, particularly since the re-opening of interstate borders and with international travellers slowly coming back to Australia.

The SATC reports that over the last three years:

- 2020 was challenging, with steep declines in visitation by April (decreased by 55%) and a slow recovery through to December.
- 2021 saw mixed results, with a more robust performance from January to May, falling back with restrictions reimposed in June and July.
- 2022 has seen a meaningful recovery, with April, May and June reporting results that can be reasonably described as “comparable to pre-COVID-19”. May, in particular, was very strong, recording the best results since the pandemic began, and exceeding pre-COVID-19 levels for the first time. Adelaide had the highest occupancy result of any Australian or New Zealand (NZ) city at 79% occupancy. In comparison, across 14 capital cities across Australia and NZ, Sydney was seventh and Melbourne eleventh in comparison.

National, state and local priorities

This plan aligns with the South Australian Tourism Commission (SATC) Visitor Economy Sector Plan 2030 whilst referencing and aligning specific strategies and tactics with several complementary strategies, including Tourism Australia’s THRIVE 2030 plan, Building Western Adelaide Strategy and participating council strategic plans.

Federal

Tourism Australia released the new THRIVE 2030: The Re-Imagined Visitor Economy Strategy in March 2022, the first official tourism strategy to be written during the pandemic. They have set the target of returning the industry to its pre-COVID levels of visitor expenditure by 2024. Achieving this is likely to rely more heavily on domestic visitor expenditure prior to COVID. This equates to total visitor expenditure of \$166 billion by 2024, working towards \$230billion by 2030 and one million tourism jobs.

South Australia

The South Australian Tourism Commission had set 2030 targets for visitor expenditure and jobs before COVID-19 in the State Visitor Economy Sector Plan 2030. The tourism plan sets a bold ambition to grow South Australia’s visitor economy to \$12.8billion and increase tourism-related jobs to 52,000. To return to pre-COVID levels, the State’s visitor economy needs to reach \$8.1billion and 36,000 jobs by 2024. Other relevant state tourism strategies considered within this TDAP are:

- SATC – Aboriginal Tourism Action Plan 2025
- SATC – Cruise Ship Action Plan 2025
- SATC – Arts & Cultural Tourism Strategy 2025.

Adelaide

Traditionally, Adelaide’s visitor economy is worth 56% of the State’s overall visitor expenditure. Due to Adelaide’s reliance on international travellers, the results for visitation and expenditure have decreased considerably. The trend shows that the South Australian regions currently make up 57% of the State’s overall visitor economy and Adelaide the remaining 43%. However, with the international market building again, it is expected that Adelaide’s visitor expenditure will rise accordingly. Adelaide would need to generate \$4.6billion in visitor expenditure by 2024 to recover from the pandemic.

From the SATC presentation at the WATA Workshop in November 2021 – with the target for SA being \$12.8billion by 2030, Adelaide needs to increase visitor expenditure to \$7.2billion. However, the Tourism Research Australia (TRA) regional profile for Adelaide (March 2022) shows Adelaide’s estimated visitor expenditure target is \$8.1billion, which is 63% of the overall visitor economy for SA. By 2025, visitor expenditure is estimated to reach \$5.9billion (an increase of 22% from 2020). The estimated value of Adelaide’s visitor economy by 2030 has been set at \$7.7billion, which will be 60% of the State’s overall result and an increase of 31% from 2025.

Western Adelaide

Like the rest of South Australia, the Western Adelaide region’s tourism results before the onset of COVID-19 were hitting high levels. The visitor economy was supporting 4,421 local businesses, 9,945 tourism related jobs. Total visitor expenditure had reached \$677million across the region, which will be the benchmark for the region’s visitor economy to achieve by 2024.

Aside from the TDAP 2020, the four Councils also have their plans and strategies for economic and tourism development, which have helped shape this updated TDAP 2024.

- City of Holdfast Bay – Tourism Recovery Plan 2023 / Economic Activation Plan 2023.
- City of Charles Sturt – Economic Development Strategy 2022-26.
- City of West Torrens – Economic Development Plan 2025.
- City of Port Adelaide Enfield – Economic Development & Tourism Strategy 2026 (currently in draft, to be endorsed January 2023).



2024 strategic focus - primary aims

<i>Aims to achieve by 2024 and beyond</i>	
1.	To further establish the WATA as the leading tourism body for the Western Adelaide region, increase the brand awareness of Adelaide Beaches and gain industry acceptance of Western Adelaide as both an important tourism destination and region within South Australia.
2.	Increasing tourism visitation numbers, overnight stays, and day trips within the Western Adelaide region to help restore the visitor economy to beyond pre-COVID-19 levels for the Western Adelaide region; 552,430 visitors, \$677million in visitor expenditure, 3.307million overnight stays and 9,945 jobs by 2024. (TRA NVS and IVS 2016-2019).
3.	The WATA to improve its profile with the South Australian Tourism Commission (SATC), the Tourism Industry Council of South Australia (TiCSA) and Tourism Australia (TA) through increased communication and collaboration.
4.	After recovering to pre-COVID-19 levels or better by 2024; the Western Adelaide region's overall visitor economy reaches the 2030 aspirational goal of \$1.3billion based on Adelaide's predicted results from the State's Visitor Economy Sector Plan 2030. The long-term aim is to increase the number of tourism businesses and related jobs within the Western Adelaide region.
5.	Work with State Government agencies and the Adelaide Economic Development Agency (AEDA) to increase Adelaide's visitor economy to \$4.6billion by 2024 and the 2030 aspirational expenditure goal of \$7.7billion, set in the State's Visitor Economy Sector Plan 2030.



6. Work with the SATC, TiCSA and TA to help increase the South Australian Visitor Economy to \$8.1billion by 2024 and the 2030 aspirational expenditure goal of \$12.8billion.
7. Work with Government agencies and private enterprise to develop a business case to create and open a new Western Adelaide Tourism Bus Route, which follows the Adelaide Beaches coastline from Glenelg to Outer Harbor.
8. Attract or deliver a new Major Event for the Western Adelaide region, which benefits local tourism businesses, all four Councils and their communities.
9. Foster relationships between the Kaurna people, government agencies and local tour companies; with an aim to create and promote Aboriginal tourism products and / or experiences within the Western Adelaide region.



Vision:

To position Western Adelaide as a must-visit destination for all visitors travelling to Adelaide, around South Australia and locals.

Primary goal:

To maximise tourism visitation and expenditure in the Western Adelaide region beyond pre-COVID-19 levels, while increasing sustainable tourism jobs.

Objectives:

Although current tourism results for South Australia are very positive, and the expectation for constant improvement within the industry is high, there is still quite a lot of uncertainty about how tourism will trend over the next two years. With this in mind, the WATA committee has kept all goals and objectives for the next two years simple and achievable. Aligned to State and Federal strategies, this TDAP will set both short-term and long-term objectives that are based on recovery from the COVID-19 pandemic.

In 2015 the WATA committee agreed to set eight objectives as part of the TDAP 2020. Six years on, those objectives are still relevant to the Western Adelaide region and form the framework for how the region will successfully navigate its way past the effects of COVID-19. The WATA committee have utilised the essence of those eight objectives to set five new objectives with short-term/long-term goals.

Objective 1: Increase Western Adelaide's regional profile within the tourism industry and State Government.

Although the WATA classes Western Adelaide as a tourism region, and for many decades has been marketed as a tourism destination, it is not formally recognised by the tourism industry or various government agencies as a tourism "region". By raising the awareness of Western Adelaide as a tourism region, the WATA committee aims to gain further traction with the SATC and Tourism Australia to have higher inclusion in marketing campaigns, industry engagement and destination development. Western Adelaide's visitor economy was worth \$677million as of December 2019, more significant than any other individual tourism region in the State i.e., the Fleurieu Peninsula, Barossa, or Kangaroo Island. Western Adelaide is a major player in the State's overall visitor economy and should be recognised as such.

Objectives to achieve	Actions	Timeframe	Stakeholders Responsible
1.1 Use Adelaide Beaches branding to market Western Adelaide as one of Adelaide's premier tourism destinations and recognisable as a tourism region within South Australia.	<ul style="list-style-type: none"> • Organise new Adelaide Beaches marketing and promotional materials. Include promotion of ATDW to local businesses and event organisers. • Launch brand via WATA workshop. • Each Council utilise branding where possible. • Adelaide Beaches brand inclusion within marketing SATC collateral. • Build on current relationships and organise regular meetings with key stakeholders. WATA also to establish a seat at the table for SATC regional meetings. 	<ul style="list-style-type: none"> • Second week Nov 2022. • Nov workshop • Ongoing • Second week Nov 2022 • Ongoing 	<ul style="list-style-type: none"> • WATA • WATA, SATC • WATA, SATC • WATA, SATC • WATA, Council CEOs/ mayors, SATC

1.2 Increase communication and collaboration with all relevant tourism and economic development agencies; the SATC, TiCSA, Tourism Australia (TA), AEDA, Regional Development Australia (RDA), Adelaide Hills, Fleurieu and Kangaroo Island.	<ul style="list-style-type: none"> • Initiate presentations to promote the region and present new initiatives to SATC staff. • Foster the creation of a Metro Tourism Group with regular meetings. • Seek LGA advice and assistance to foster tourism collaborations. • Refine the subscription process for the Adelaide Beaches mail list and increase the database. • Create new tourism update information EDM. 	<ul style="list-style-type: none"> • Ongoing – First meeting in December 2022. • Start December 2022 – ongoing • January 2023. • January 2023 • October 2022 	<ul style="list-style-type: none"> • WATA, SATC. • WATA, SATC, Council CEO/Mayor • WATA, SATC, TiCSA, AEDA, DEW, RDAAHFKI. • WATA, LGA • WATA
1.3 Draft a new Marketing Plan 2022-24 that includes familiarisation trips within the region for the promotion of tourism products and experiences, industry engagement, workshops and training.	<ul style="list-style-type: none"> • Review the previous WATA draft marketing plan (2018-2019), include review of "Live in the West" proposal prepared by Super Assembly and update / adapt content to create the new plan (2022-24). • Further develop "Dive into the West" campaign and content on the Adelaide Beaches website. • Use updated statistics and tourism market knowledge to establish regional target markets. • Liaise with the SATC Marketing team to align the new plan to outline State trends and future campaigns. • Finalise the marketing budget for the 2023-24 financial year. • Assign budget commitments to market and promote the region. 	<ul style="list-style-type: none"> • September – October 2022 • October – November 2022 • September 2022 – January 2023 • September – October 2022 • September – October 2022 • November 2022 	<ul style="list-style-type: none"> • WATA • WATA, TRA, SATC, TA, AEDA. • WATA, TRA, SATC, TA, AEDA. • WATA • WATA • WATA
1.4 Build the regional profile of Western Adelaide to a point where it is considered to be and is recognised as a tourism region within South Australia.	<ul style="list-style-type: none"> • Create a business case for WATA regional representation at State and National trade events i.e. Australian Tourism Exchange, TiCSA SA Tourism Conference. • Identify businesses that could partner with WATA to attend major trade events. • WATA attends trade events. • Western Adelaide region included within travel company / wholesaler itineraries. • Top 10 businesses promotion and leads through the website. 	<ul style="list-style-type: none"> • November 2022 – January 2023. • November 2022 – January 2023. • 2024 • 2024 • November – December 2022 	<ul style="list-style-type: none"> • WATA, SATC, TiCSA, TA. • WATA, SATC, TA • WATA • WATA, SATC, TA • WATA



Objective 2: Improve tourism research and statistic building for the Western Adelaide region

All four Councils within the WATA use different companies and programs to determine up-to-date information and statistics concerning tourism and economic development. The SATC relies on Tourism Research Australia (TRA) and Deloitte Australia (The Value of Tourism) for their statistics and research information requirements. As a rule, the tourism industry recognises TRA as the primary source of tourism statistics and results.

Unfortunately, it is currently impossible to obtain up-to-date statistics or results for the Western Adelaide region because of the way that TRA drills down available information, considering Western Adelaide is not defined as a South Australian tourism region. The WATA committee recognises that information sharing (statistics and results) between the four Councils needs to be improved.

Objectives to achieve	Actions	Timeframe	Stakeholders responsible
2.1 Improved sharing of all types of statistical results/information other than those recorded by Tourism Research Australia (TRA) i.e. REM-PLAN, Spendmapp, ABS, Localis, McGregor Tan and others.	<ul style="list-style-type: none">• All 4 councils utilise all current data and statistical systems they currently use to gather new tourism information and results for the Western Adelaide region.• Share data between councils and request regional tourism statistics/information from key stakeholders and tourism providers where possible.• Compile data and statistics for a regional report, from the various datasets and communicate to local tourism businesses and government agencies.• Provide targeted snapshots of relevant statistics to tourism businesses to inform their own promotional strategies.	<ul style="list-style-type: none">• September – October 2022• November 2022• April – May 2023• April – May 2023	<ul style="list-style-type: none">• WATA• WATA• WATA• WATA
2.2 The WATA will liaise with TRA to attempt to access fresh new statistical information and future results for the Western Adelaide region.	<ul style="list-style-type: none">• Liaise with TRA to advise of the possibilities of WATA gaining the regional tourism data it requires.• If possible, work with TRA to set up future reporting needs.	<ul style="list-style-type: none">• October 2022• October 2022	<ul style="list-style-type: none">• WATA, TR, SATC• WATA, TR

<p>2.3 Create an annual WATA update/report for all four Councils and industry stakeholders, including overall visitor numbers, total visitor expenditure, overnight stays, day trips, jobs, ATDW registrations, new products/businesses, industry news and government updates including grant opportunities.</p>	<ul style="list-style-type: none"> • WATA to create internal quarterly updates and reports, which will be used to create the annual update/report. • WATA to conduct an annual survey with local tourism businesses (Survey Monkey) to collect information and industry sentiment. • Produce an annual update for industry stakeholders and a report for the four councils. 	<ul style="list-style-type: none"> • First quarterly edition – October 2022 • May 2023 • May – June 2023 	<ul style="list-style-type: none"> • WATA • WATA • WATA
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Objective 3: Advocacy for tourism businesses

Tourism businesses within the region need to view the WATA as the leading Western Adelaide tourism body, and their conduit to local, state and federal government bodies and agencies. The WATA can achieve this by offering business advice, including business and product development, training workshops, industry updates and navigating tourism funding opportunities when available. By being recognised as the designated tourism body for the region, the WATA can advocate for the local tourism businesses and help create positive changes and opportunities for the future.

Objectives to achieve	Actions	Timeframe	Stakeholders responsible
3.1 WATA to represent and promote the Western Adelaide region (including the local tourism businesses) to local, state and federal government agencies.	<ul style="list-style-type: none"> • Organise familiarisation trips for SATC, TiCSA and TA staff, showcasing the region and local businesses. • Run four Western Adelaide regional workshop/networking events per year. • Work with local tourism businesses to improve overall communication with government bodies. 	<ul style="list-style-type: none"> • Ongoing • Ongoing • Ongoing 	<ul style="list-style-type: none"> • WATA, SATC, TA, TiCSA. • WATA • WATA
3.2 Liaise with the four councils within the WATA on behalf of local tourism businesses regarding regulatory information and red-tape reduction.	<ul style="list-style-type: none"> • Assist with permit applications, grant funding applications / information / opportunities, infrastructure requirements / upgrades. • Assist local businesses with new product development and business opportunities. • Develop a Business friendly council toolkit for local tourism businesses to access. As an example, review District Council of Yankalilla's events toolkit. 	<ul style="list-style-type: none"> • Ongoing • Ongoing • September – December 2022. 	<ul style="list-style-type: none"> • WATA • WATA • WATA, Events SA, SATC, TiCSA.
3.3 Promote and enhance the profile of the WATA to local tourism businesses, as the main tourism body for the Western Adelaide region.	<ul style="list-style-type: none"> • Develop reputation within the region for providing quality business and product development support. • Build relationships with local tourism businesses and provide them with regular updates. • Encourage local tourism businesses to contact the WATA for business/product development advice and assistance. • Create a two-way reporting system between the WATA and local tourism businesses; disseminate information, problem solving, industry sentiment, change to market trends and governmental advocating. 	<ul style="list-style-type: none"> • Ongoing • Ongoing • September 2022 – ongoing. • September 2022 – ongoing. 	<ul style="list-style-type: none"> • WATA • WATA • WATA • WATA



Objective 4: Business and Product Development

The committee members of the WATA have strong backgrounds in tourism and economic development, design, marketing and communications. Therefore, as a group, the WATA can offer local tourism businesses excellent advice and training, helping them improve and look towards the future with enthusiasm and confidence.

By increasing the collaboration and communication with the SATC and Tourism Australia, the WATA can promote regional tourism businesses and new product offerings. A new Business and Product Audit is required for the entire region. Gathering this type of research is imperative for the WATA to start planning for the region's future. By understanding what businesses have survived the pandemic and what businesses/products the Western Adelaide region has lost and gained, we can identify the gaps in the market and start planning towards filling them. Having a suite of new and improved tourism products to help market the Western Adelaide region, as well as enhancing the existing businesses throughout Western Adelaide, will make the region more robust and resilient.

Objectives to achieve	Actions	Timeframe	Stakeholders responsible
4.1 Region-wide Business and Product Audit.	<ul style="list-style-type: none"> • WATA to undertake a Regional Business and Product Audit to determine what Western Adelaide now offers, what gaps are now present and any opportunities to develop new niche products. • Produce a short report for the four Councils and SATC. • Regional Business and Product audits to be updated every 12 months. 	<ul style="list-style-type: none"> • October – December 2022 • February/March 2023 • Jan 2024 	<ul style="list-style-type: none"> • WATA, SATC • WATA • WATA
4.2 Build on existing regionally unique features and identify/celebrate niche experiences, events and products.	<ul style="list-style-type: none"> • Work with the SATC Destination Development and Marketing teams to encourage local tourism businesses to expand their product offerings, create new products to fill in the gaps, or develop niche offerings. • Provide local tourism businesses easy access to business and product development advice and training opportunities. • Develop a brand hero statement; update Western Adelaide regional tourism 'hero' list and promote top ten through the Adelaide Beaches website blogs and news reports. • Update the unique selling points for the Western Adelaide region and promote and increase market knowledge. Include as part of the marketing plan draft. • Develop a tourism business 'tool kit' to help local businesses develop and improve their offerings. • Facilitate the development of Aboriginal tourism products and experiences within the Western Adelaide region. Work with Kurna Elders and representatives and businesses to liaise with government bodies to help provide assistance with business and product development, grant funding opportunities, marketing and promotion. 	<ul style="list-style-type: none"> • Ongoing • Ongoing • September – October 2022 • October – November 2022 • September – December 2022 • November 2022 – December 2024 	<ul style="list-style-type: none"> • WATA, SATC • WATA, SATC, TiCSA. • WATA, SATC • WATA, SATC • WATA, SATC, Events SA, TiCSA, AEDA, TA. • WATA, SATC, TA, AEDA, Kurna Elders and representatives.

<p>4.3 Foster existing and attract new tourism businesses to the Western Adelaide area, by developing a regional 'new product pitch' document, outlining how good it is to have a tourism business in the Western Adelaide region and the various opportunities.</p>	<ul style="list-style-type: none"> • To increase overall regional product and experience offerings, WATA to promote the need for and facilitate the development of two new products or experiences per council area. • Using the information gained from the Regional Business and Product Audit, the WATA will develop a New Product Pitch (NPP) document that can be utilised by local tourism businesses, the four Councils and the SATC. • Promote the NPP document to local tourism businesses and government agencies through; communications, familiarisation trips, workshops and networking events. 	<ul style="list-style-type: none"> • December 2022 – December 2024. • December 2022 – February 2023. • March 2023 – ongoing. 	<ul style="list-style-type: none"> • WATA, SATC, TiCSA, AEDA. • WATA, SATC • WATA, SATC, TA.
<p>4.4 Encourage more entries to the SA Tourism Awards and help tourism businesses with accreditation.</p>	<ul style="list-style-type: none"> • Hold a regional workshop (around March 2023) to promote the TiCSA 2023 South Australian Tourism Awards, which includes; information on category guidelines, how to enter, judging expectations, access to advice and assistance throughout the application process. • Liaise with local tourism businesses that enter, offering advice and assistance where possible. • Promote finalists and winners through communications and the Adelaide Beaches website. 	<ul style="list-style-type: none"> • February – March 2023 • March – August 2023 • October – December 2023 	<ul style="list-style-type: none"> • WATA, TiCSA, SATC. • WATA, TiCSA • WATA

4.5 Liaise with and lobby State Government bodies and speak with transport companies to develop a plan to create a dedicated tourism bus route that takes in the Adelaide Beaches coastline and our western suburbs.	<ul style="list-style-type: none"> • WATA to facilitate meetings with stakeholders to develop ideas and create a business case for a new tourism bus route that connects Glenelg to Outer Harbor along the Adelaide Beaches coastline. • WATA to liaise with relevant government departments and consult with transport companies to develop a concept / pilot service. • WATA to lobby all key stakeholders to get the project approved and in operation. • New Western Adelaide tourism bus route organised, funded and running. 	<ul style="list-style-type: none"> • December 2022 – May 2023 • December 2022 – May 2023 • May 2023 – ongoing • May 2023 – December 2024 	<ul style="list-style-type: none"> • WATA, Council CEOs / mayors, DPTI, SATC. • WATA, Council CEOs/ mayors, DTI, SATC, Adelaide Metro, Link SA • WATA, Council CEOs/ mayors, DTI, SATC, Adelaide Metro, Link SA • As above.
4.6 Attract or develop a regional major event that will benefit all four councils.	<ul style="list-style-type: none"> • Examine current and new events exploring regional benefits, including sponsorship. • WATA to work with events teams from the four Councils to develop concepts for a new major event for the region. • WATA to liaise with Events SA to further develop the concept and seek grant funding and sponsorship opportunities. • Schedule and undertake the new major event. • Create an event overview report outlining statistics, economic results, visitor numbers, visitor sentiment and feedback. This can be given to the four Councils and used for required reporting for grant funding achieved. 	<ul style="list-style-type: none"> • November 2022 – February 2023 • November 2022 – February 2023 • November 2022 – February 2023 • February – March 2023 • March 2023 – December 2024 	<ul style="list-style-type: none"> • WATA • WATA, Events SA, SATC • WATA, Events SA, SATC, RDAAHFKI. • WATA, Events SA. • WATA, Events SA.



Objective 5: Destination Marketing and Development

Before the COVID-19 pandemic, the WATA was quite confident about the target markets for the Western Adelaide region. Ongoing market research and analysis is undertaken to ensure WATA reaches our target markets. The WATA need to market the Western Adelaide region as a tourism destination for South Australia, not just if you are visiting Adelaide.

Due to the pandemic, all tourism markets have gone through change. Most compromised has been the international market, followed by interstate travellers. The intrastate market has become the life force of the State's visitor economy. However, as part of the recovery process, the tourism markets are in a phase of constant change, as travel opportunities still open up.

5.1 WATA to undertake new research to redefine the current personas of the region's target market and update them.	<ul style="list-style-type: none">• WATA to undertake a research study to redefine and update the current target market personas, working in conjunction with the SATC Marketing team.• Work with and leverage the research that the SATC and Tourism Australia have undertaken to learn more about the 'new' tourism world we currently are living in. What are the SATC's expectations for the domestic and International tourism markets over the next 2-5 years?	<ul style="list-style-type: none">• September 2022 – March 2023• September 2022 – March 2023	<ul style="list-style-type: none">• WATA, SATC• WATA, SATC, TA.
5.2 Launch and roll-out new Adelaide Beaches brand.	<ul style="list-style-type: none">• WATA (City of West Torrens) will hold a workshop/ networking event in November 2022; a new branding presentation and Adelaide Beaches website launch.• On the back of the re-brand and updated website WATA will use the new branding and website as marketing tools within the 12 month Marketing Plan (2022-23).• All new marketing collateral to use new branding.• Digitise / animate the pelican brand logo.• Generating blogs, stories and trails.	<ul style="list-style-type: none">• November 2022• November 2022 – ongoing• Ongoing• September 2022 – December 2024• September 2022 – ongoing	<ul style="list-style-type: none">• WATA, Super Assembly, JABA.• WATA• WATA• WATA• WATA

5.3 Continue to work with local tourism businesses and event organisers to utilise the Australian Tourism Data Warehouse (ATDW).	<ul style="list-style-type: none"> • WATA to promote the benefits of updating/creating a page for a business or event on the ATDW. • Assist businesses and event organisers to navigate the ATDW and create or maintain a page. • Work with the ATDW and SATC staff to regularly update the number of registered pages for the region. 	<ul style="list-style-type: none"> • October 2022 – ongoing. • October 2022 – ongoing. • October 2022 – ongoing. 	<ul style="list-style-type: none"> • WATA, SATC, ATDW. • WATA, SATC, ATDW. • WATA, SATC, ATDW.
5.4 All four councils in the alliance to include Adelaide Beaches branding in marketing, events and communications.	<ul style="list-style-type: none"> • WATA committee members to work with the four councils (i.e. city activation / communications) to maximise usage of the Adelaide Beaches branding. 	<ul style="list-style-type: none"> • Oct 2022 – ongoing. 	<ul style="list-style-type: none"> • WATA, SATC
5.5 Seek grant funding for destination and marketing development.	<ul style="list-style-type: none"> • As part of developing the new Marketing Plan, look at projects for either 2022-23 or 2023-24 FY that may require outside funding to be completed. • WATA to keep track of funding opportunities that may be appropriate for future marketing projects. • Apply for funding where possible. • Street banners and signage upgrades throughout the region. 	<ul style="list-style-type: none"> • November 2022 – February 2023 • November 2022 – ongoing • Ongoing • December 2022 – July 2023 	<ul style="list-style-type: none"> • WATA • WATA, SATC, Events SA, RDAAHFKI, DEW. • WATA • WATA



5.6 Customer service and tourism product training for all regional VIC or VIO staff and volunteers within the Western Adelaide region.	<ul style="list-style-type: none"> • Ongoing training for all customer service volunteers at the Glenelg VIO, Port Adelaide VIC, COCS Library. • Use the new product and experience audit to update the volunteers and set best practice examples of how to 'sell' the region to tourists. • Promote the ideal of the Western Adelaide region being a major tourism destination within the state. • Create an Adelaide Beaches first, Adelaide and regions second ethos within the minds of the volunteers. 	<ul style="list-style-type: none"> • December 2022 – ongoing • December 2022 – February 2023 • December 2022 – ongoing • December 2022 – ongoing 	<ul style="list-style-type: none"> • WATA • WATA • WATA • WATA
5.7 The WATA works towards setting some aspirational goals for marketing the region.	<ul style="list-style-type: none"> • Investigate / create business case for selling advertising on the Adelaide Beaches website (possibly making it cost-neutral or profitable to run in the future). • Increasing marketing collateral, attending trade events both local and national, and increasing digital marketing (social media). • TV commercials / radio spots. • Adelaide Beaches calendar. • A3 tear off map(s). 	<ul style="list-style-type: none"> • December 2022 – October 2023 • Dec 2022 – Oct 2023 • Dec 2022 – October 2023 • Dec 2022 – Oct 2023 • Dec 2022 – Oct 2023 	<ul style="list-style-type: none"> • WATA • WATA • WATA • WATA • WATA
5.8 Enter the South Australian Tourism Awards in the destination marketing category in the next 2 to 4 years.	<ul style="list-style-type: none"> • Create a plan to look at what is involved in applying for a SA Tourism Award (Destination Marketing) in the next 2-4 years. • WATA to work towards gaining all necessary information and statistics required to make an application. • Apply for the award. 	<ul style="list-style-type: none"> • March – June 2023 • June 2023 – March 2024 • February 2025 	<ul style="list-style-type: none"> • WATA, TiCSA • WATA, TiCSA • WATA, TiCSA



Appendix

South Australian Tourism Commission – Strategies and plans

South Australian Visitor Economy Sector Plan 2030

The 2030 Visitor Economy Sector Plan will push the industry towards contributing \$12.8b in visitor expenditure and 51,000 jobs by 2030. The visitor economy is a super growth sector and is now a key contributor to the economic prosperity of our state. Since the development of the SA Tourism Plan 2020 in 2013, the SA visitor economy has grown 2.5 times faster than the overall economy.

The plan outlines a series of pillars as the focus of industry development, which include;

1. Marketing
2. Experience and supply development
3. Collaboration
4. Industry capability
5. Leisure and business events
6. Promoting the value of tourism.

Factors that are driving growth in visitation;

- Exceptional food and beverage experiences
- Immersive nature and wildlife experiences
- Events and festivals
- Road trips
- History / heritage and Aboriginal experiences.

The six strategic pillars (in relation to Western Adelaide region)

1. Marketing

- Most consistent theme to emerge was marketing and driving consumer demand.
- Primary target market for SA remains the high-yielding experience seeker across our international and interstate markets.
- Intrastate represents half of the visitor expenditure and is a more loosely defined target market as it requires all South Australians to engage with their own state and the barriers to visitation are far lower.

- Consistent and effective promotion of South Australia will be achieved through a range of methods including traditional media, social media and digital platforms as well as emerging marketing platforms that will be developed over the coming decade.
- Effectively target high-yielding travellers.
- Communicate SA's key brand pillars.
- Maximise dispersal and expenditure by providing and promoting compelling itineraries.
- Encourage visitors to promote and advocate for SA through social media and word of mouth.
- Align product promotion with product development.

2. Experience and supply development

- 'Hero experiences' that offer unique, world-class, highly appealing visitor experiences have a transformative effect on the surrounding area, pulling in high value visitors who are more engaged with the destination, extending length of stay and increasing overall yield.
- It is essential that accommodation operators deliver superior services and unique value-adds.
- Connectivity and linkages between individual experiences to create clusters is also a priority.
- Support the development of unique and appealing experiences.
- Upgrade and refresh quality of accommodation to match consumer expectations and create immersive experiential accommodation options.

3. Collaboration

- There are many levels at which working together can benefit the visitor economy.
- It is critical that complementary experiences are well integrated to allow for a seamless customer experience. Cross-promotion of experiences allows for a higher level of visitor satisfaction and will drive increased yield.
- Regular and constructive partnering between operators, key industry bodies and government.
- Encourage and create opportunities for cross-promotion within regions linking experiences and providing recommendations to maximise visitor engagement.
- Drive growth by optimising the experience of international students and their families in SA through partnerships with educational institutions.

4. Industry capability

- It is essential that there is a high level of capability to ensure both business sustainability and high-quality experiences and service.
- Industry requires ongoing development in a broad range of areas, including; ongoing business training, digital skills enhancement, customer service standards, and tailoring experiences to emerging markets.
- Ensure Visitor Economy businesses have access to, and engage with, tools and technologies to maximise their professionalism and profitability.
- Ensure industry has access to strong training and development programs to assist in filling skill gaps.
- Ensure continued strong take up of listings on the ATDW with a focus on commissionable product.

5. Leisure and business events

- Events and festivals in ADL and regional SA are important drivers of visitation.
- Business events, including conferences, exhibitions and incentives, also have a key role, particularly for ADL and adjacent regions. Pre and post touring of these high-spending visitors is a distinct opportunity.
- Need to further develop Major Events, as well as attracting investment and increased sponsorship.
- Use business and leisure events to smooth seasonality.
- Maximise the opportunities that events and festivals offer to the local region, maximise the value of existing events through cross-promotion.

6. Promote the value of tourism

- Tourism and the broader visitor economy, has a key role in driving real jobs and economic growth across SA.
- Community endorsement of the Visitor Economy will allow for a range of stakeholders, including local government, to invest with confidence.
- A higher profile for the visitor economy will also attract young people to pursue a career in the tourism sector, driving new ideas, skills and enthusiasm that industry needs to achieve our ambitious goals.

- Educate the community about the breadth of the visitor economy and the delivery of businesses that benefit.
- Engage locals and visitors to be ambassadors for the state.

SATC – Aboriginal Tourism Action Plan 2025

For the purpose of this Plan Aboriginal tourism is defined as the act of participating in a tour, experience or activity that involves interaction with Aboriginal and Torres Strait Islander people, community, site or artefact (including retail purchases), in a manner that is appropriate, respectful, and true to the Aboriginal culture, heritage and traditions being presented. It is recommended that where Aboriginal culture is the product, Aboriginal people determine its content and interpretation.

Total trip spend for visitors to South Australia who undertook an Aboriginal Experience peaked at \$275M pre-COVID and decreased to \$146M by September 2020 due to the border closures to International travellers.

Aboriginal tourism businesses can be defined as being:

- Wholly owned and operated by Aboriginal people.
- Operated in partnership with non-Aboriginal people and have the ongoing consent of the appropriate Aboriginal people.
- Those businesses that are owned and/or managed by Aboriginal people, as well as those non-Aboriginal businesses that deliver true Aboriginal cultural experiences (developed by way of joint ventures or collaborative marketing).

Neighbouring Aboriginal language groups to the Kaurna people; Narangga (Yorke Peninsula), Ngadjuri (Mid North / Southern Flinders), Ngarrindjeri (Murray River / Coorong), Nukunu (Upper Spencer Gulf), Peramangk (Barossa).

Four key objectives (with reference to the Western Adelaide region)

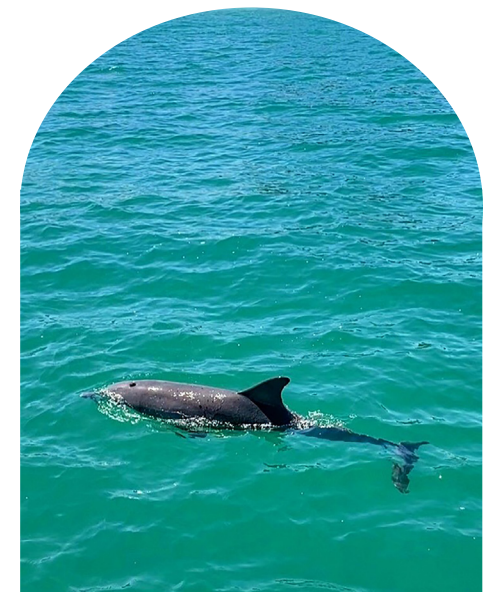
1. Encourage investment in new, and enhance existing, Aboriginal tourism products, experiences and activation of natural assets.
 - Provide tourism advice and support in developing new products and experiences with domestic and International appeal.
 - Seek and communicate funding opportunities for Aboriginal tourism businesses to deliver projects.
 - Encourage and facilitate business and investment.
2. Provide industry capability building opportunities for new and existing Aboriginal tourism operators and ensure quality service, products and experiences are delivered to visitors.
 - Provide industry tools and resources toolkit to engage new and existing Aboriginal tourism operators.
3. Foster strong partnerships and build meaningful relationships between community groups, private investors and local, state and federal governments.
 - Engage in regular meetings with key federal, state and local government stakeholders to ensure Aboriginal tourism operators and projects are considered and prioritised.
4. Promote and market Aboriginal tourism to South Australia's key domestic and international markets.
 - Develop and implement a new marketing plan to promote South Australia's Aboriginal tourism products and experiences through digital and social media platforms.

SATC – Cruise Ship Action Plan 2025

The South Australian Tourism Commission (SATC) will be focused on the safe resumption of the cruise industry for our state. We will be focused on encouraging investment in new cruise infrastructure, increasing regional dispersal and ensuring our services, products and experiences are safely delivered to meet expectations of cruise lines, passengers, regional destinations and local communities.

To achieve this, we need to:

- Promote South Australian ports and anchorages as a safe destination choice.
- Ensure quality service, products and experiences are delivered to meet expectations of cruise lines and passengers.
- Encourage investment in new products, experiences and cruise destination infrastructure.
- Increase cruise line and passenger expenditure in South Australia.
- Increase safe regional dispersal from cruise lines and passengers when they visit our state.



Having an appealing range of products and experiences for cruise lines to build unique itineraries supporting regional dispersal, has reinforced South Australia's reputation as a 'must see' destination as many of South Australia's tourism experiences are located within a day trip from the respective port or anchorage.

Port Adelaide Passenger Terminal at Outer Harbor (Adelaide)

The recently refurbished Port Adelaide Passenger Terminal, funded by the SATC and Flinders Ports, is part of the Outer Harbor shipping facility, with four berth options at the wharf for visiting cruise ships. Passengers have many transportation options; the train station is ideally located 100 metres from the passenger terminal which offers a service into the city for shopping or there are many shore excursion options available in and around Adelaide, Adelaide Hills, Barossa and McLaren Vale.

- The SATC have highlighted a primary need to develop an Adelaide Beaches Tourist Bus Route from Outer Harbor to Glenelg, to enhance the product offerings and services to the Cruise Ship market.

Five key objectives (with reference to the Western Adelaide region)

1. Promote South Australian ports and anchorages as a safe and highly appealing cruise destination.
 - Develop new and innovative opportunities for cruise line itinerary planners and inbound tour operators for shore excursion programs.
 - Develop new products and experiences that will assist to drive demand and attract new itineraries to South Australia.
2. Ensure quality service, products and experiences are delivered to meet expectations of cruise lines and passengers.
 - Work with cruise lines and Inbound Tour Operators (ITOs) to ensure the best products and experiences are included in shore excursion programs and are being offered to passengers.

3. Encourage investment in new products, experiences and destination infrastructure.
 - Share research and insights into growth opportunities and future infrastructure requirements to partners and industry stakeholders.
 - Encourage investment into new and existing infrastructure by government and the private sector.
 - Work with the Department for Infrastructure and Transport (DIT) to ensure cruise industry requirements are represented and captured in the 50 Year Port Strategy development.
 - Identify new destinations and required infrastructure to facilitate cruise ship visits.
4. Increase cruise line and passenger expenditure in South Australia.
 - Provide tools, resources and opportunities for tourism operators to participate in and engage with the cruise industry and visiting cruise passengers.
5. Increase safe regional dispersal from cruise lines and passengers when they visit our state.
 - Promote South Australian shore excursion products and experiences to ITOs and cruise lines, highlighting COVID safe management plans.
 - Increase the number of regional products and experiences involved in for shore excursion programs for cruise lines.



SATC – Arts and Cultural Tourism Strategy 2025

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

While the language used within the arts and cultural and tourism sectors can differ, the intention of both industries is in alignment. That is, to deliver and share exceptional experiences that are inclusive, authentic and enrich people's lives. The value of the arts and cultural sector is not just measured in economic terms but also in terms of its greater contributions to society.

Arts and cultural festivals and events are an important element of the tourism sector, as together with broader destination marketing, they drive visitation and encourage people to stay longer, spend more and explore further.

This strategy defines arts and cultural tourism to cover the following key pillars;

- Aboriginal cultural experiences
- performing arts and live music
- galleries, libraries, archives and museums
- festivals and events
- heritage experiences
- outdoor and public art.

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

Aboriginal cultural experiences resonate more strongly with the international market with 32 per cent of international arts and cultural tourism visitors undertaking this activity compared to the domestic market where uptake was 1 per cent or less. This market is important to this strategy in the long term once border restrictions are eased and international travel resumes.

Consumer research has identified South Australian experiences with high visitor appeal are the State's exceptional food and wine offerings, immersive nature and wildlife experiences, as well as festivals and events, and Aboriginal and heritage experiences.

Eight key objectives

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

Strategic Priorities (with reference to the Western Adelaide region)

Marketing

- Showcase the State's diverse year-round arts and cultural program including authentic Aboriginal cultural tourism experiences. A key part of this year-round promotion is shining the light on the State's urban and regional festivals and stand-alone cultural events program.
- Expand arts and cultural tourism targeting to include international students and their families and business event and conference visitors.

Experience and supply development

- Package and include arts and cultural tourism offerings into travel distribution intermediaries (eg. travel agents, wholesalers, online tourism aggregators like booking.com) so they can sell these experiences to more travellers.
- Leverage existing resources, such as the tourism industry development fund to develop new products in arts and cultural tourism.

- Collaborate with Aboriginal cultural representatives and stakeholders to grow and develop arts and cultural tourism experiences including through the Aboriginal Art and Cultures Centre (Lot Fourteen).

Collaboration

- Collaborate across and within all levels of government (federal, state and local) to ensure government strategy and investment are aligned as much as possible.
- Use increased collaboration to identify current and future areas of need for strategic initiatives, training or sector development. This can be achieved via cooperation with organisations such as industry associations.
- Support collaboration with and between metropolitan and regional councils as well as with those providing artistic experiences to further enable and deliver quality arts and cultural tourism offerings at the local level.

Industry Capability

- Provide training, upskilling and support for arts and cultural operators and enable them to access existing SATC toolkits, webinars and training across marketing, distribution, and product development.
- Review government product development programs for Aboriginal tourism businesses and develop new cross-government approach.
- Foster Aboriginal tourism business development with the support of organisations such as Indigenous Business Australia, the National Indigenous Australians Agency and Regional Development Australia, and harness opportunities around new developments, such as the Aboriginal Art and Cultures Centre.
- Continue to support funding and create incentives for product development, collaboration, innovation, and creativity.

Festivals and Events

- Enable the sector to deliver unique and premiere experiences that motivate year-round visitation to the state.
- Actively working with the sector to identify and invest in new opportunities for strategic growth.
- Optimise how visitors attending iconic Adelaide-based festivals, events, and major institutions discover smaller local and regionally based Arts and Cultural offerings.
- Support the creation, development and expansion of regional arts and cultural events via the SATC's South Australian Regional Events Fund.
- Continue to foster growth of new events and the amplification and increased frequency of existing arts and cultural festivals and events based on consumer demand.

Promoting the value of arts and cultural tourism

- Continue to measure and report on travel expenditure where trips have an arts and culture component.
- Champion the value of Aboriginal cultural experiences for visitors, communities, and society.

Growing Our Heritage Future – 10 year strategy for heritage tourism in SA

Growing heritage tourism will support diverse and economically sustainable destinations. It will foster value and appreciation for our fascinating past and the future's unwritten possibilities. This strategy aims to increase the value of heritage tourism to the state's visitor economy from \$1B to \$1.58B by 2030.

When visitors seek true connections to the people and places they visit, heritage deepens that experience because it reveals what makes South Australia special. The Western Adelaide region can support Heritage Tourism by aligning the TDAP to the following actions within this strategy;

- Proactively develop outstanding heritage experiences.
- 1.4 Invest in developing Aboriginal heritage tourism to transform the South Australian visitor experience.
- 2.1 Collaborate and establish innovative partnerships to increase capacity and opportunities for heritage tourism initiatives in regional areas.

- 3.2 Encourage accessible, adaptive reuse of heritage, including sites and places, for tourism activities.
- 3.4 Leverage the expertise of storytellers, cultural knowledge custodians, historians and other heritage disciplines to enrich visitor experiences of special places and sites.

Related strategy metrics

South Australian Visitor Economy Sector Plan 2030

- Total tourism expenditure – \$8.1billion (DEC 2019) / \$10billion (DEC 2025) / \$12.8billion (DEC 2030)
- Total tourism jobs – 40,500 (JUN 2019) / 45,000 (DEC 2025) / 52,000 (DEC 2030)
- Leisure events expenditure – \$383million (DEC 2019) / \$546million (DEC 2025) / \$750million (DEC 2030)

South Australian Regional Visitor Strategy 2025

- Regional visitor expenditure – \$3.6billion (DEC 2019) / \$4.0billion (DEC 2025)

Growing Our Heritage Future 2030

- Heritage tourism expenditure – \$1billion (DEC 2019) / \$1.58billion (DEC 2030)

Tourism Australia – Thrive 2030 Strategy: ‘The Re-Imagined Visitor Economy’

Targets

- Interim – \$166billion by 2024 (domestic \$120billion / international \$46billion)
- Long term – \$230billion by 2030 (domestic \$149billion / international \$81billion)
- One million tourism jobs

The 3 Thrive 2030 phases

- Recovery phase (2022–2024) – Maintain efforts on recovery as the Australian economy continues to open up and international markets return. Focus on rebuilding the visitor economy by driving domestic and targeted international visitation, and addressing priority supply issues including workforce shortages, destination development, and improved data. Achieve pre-COVID levels of visitor expenditure by the end of 2024 (\$166billion).

- Consolidation phase (2025–2027) – Maintain consistent growth.
- Acceleration phase (2028–2030) – Achieve total visitor expenditure of between \$195billion and \$270billion by 2030, with a target figure of \$270billion.

Phase 1: Recovery 2022–2024

Rebuild Australia’s visitor economy to the pre-COVID level of \$166billion by 2024, then work towards the aspirational target of \$270billion by 2030.

Actions pertaining to Western Adelaide region include the following:

Priority 1 – Comprehensive collaboration

Governments (at all levels) and industry collaborate across and within stakeholder groups to deliver the strategy and grow a stronger and more resilient visitor economy.

- Action 1.6: Ensure that the visitor economy is considered and integrated into state and local crisis management and recovery plans.



Priority 2 – Improve data and insights

Produce relevant, robust and timely data and insights that underpin business improvements, industry growth and investor confidence.

- Action 2.5: Implement a visitor expenditure target specifically for regional Australia to help drive and monitor visitor economy growth in regional Australia.

Priority 3 – Grow a secure and resilient workforce

The sector has a world-class workforce with the right skills to address visitor needs and grow the sector's competitiveness, while maintaining a stable supply pipeline that can withstand changing market forces.

- Action 3.2: As a priority, develop a visitor economy workforce and skills strategy in response to ongoing workforce pressures exacerbated by the COVID-19 pandemic.
- Action 3.3: Encourage local job creation through business start-up and self-employment advisory services. Support tourism and hospitality employers to develop long-lasting workforce solutions.
- Action 3.8: Promote the visitor economy as an attractive career choice including through incentives and awards to promote best practice by employers.
- Action 3.9: Develop Aboriginal and Torres Strait Islander training programs – develop new products or experiences in the sector. Promote access to the \$10million National Indigenous Tourism Mentoring Program.

Priority 4 – Embrace leading-edge business practices

Improve business capability to create competitive, resilient, and sustainable businesses which deliver high quality products and services. Optimise uptake of technology to improve service delivery and business efficiency.

- Action 4.1: Build business capability programs that help drive product innovation, diversification and product quality to deliver world-class visitor experiences including micro-credentialing and accreditation for tour guiding.
- Action 4.3: Encourage businesses to implement resilience and crisis management plans.
- Action 4.5: Develop, promote, and encourage businesses to improve quality through industry-led programs and celebrate exceptional visitor economy businesses.

Priority 5 – Enhance visitor infrastructure

Deliver the right amount and quality of infrastructure to satisfy visitor needs, including accessibility requirements, and ensure it is developed and managed sustainably.

- Action 5.3: Develop assets, infrastructure and experiences that are accessible to all people, regardless of physical limitations, disability or age.
- Action 5.4: Prioritise new destination development through use of holistic destination plans, community and stakeholder collaboration, and streamlined regulatory approvals.
- Action 5.7: Identify and deliver improved visitor assets and resources at culturally significant sites.
- Action 5.12: Work collaboratively to address barriers to maximising the contribution from the cruise sector and managing associated community concern. Grow the Cruise market – converting cruise participation into domestic spend.

Priority 6 – Build markets and attract visitors

Attract high-value visitors through coordinated, innovative, focussed, and personalised visitor attraction strategies that are targeted at a re-balanced mix of domestic and international markets.

- Action 6.3: Encourage Australians to spend on the domestic visitor economy as they would overseas, including through targeted offerings and marketing. Apply behavioural economic research to develop product and marketing approaches to attract greater domestic visitation and spend.

Priority 7 – Grow unique and high-quality products, including Aboriginal and Torres Strait Islander experiences.

Provide high-quality products and services that leverage Australia's competitive advantage such as our natural, built, and cultural attributes, including our Aboriginal and Torres Strait Islander cultures, vibrant cities, and authentic regions.

- Action 7.1: Expand target market offerings including for high yield / luxury visitors and business travellers.
- Action 7.3: Support return of events, including business, cultural and arts, regional, and major events, and implement an annual coordinated calendar of events to encourage new and return visitors. Incorporate creative / cultural assets into destination marketing to maximise contribution of the creative economy.

Establish new mass participation events.

- Action 7.4: Cities develop and offer compelling differentiated offerings for both the domestic and international markets to revitalise visitation.
- Action 7.5: Grow and develop high-quality products and experiences around unique Australian locations, including approaches which integrate sustainable nature tourism with economic opportunities for Traditional Owners, and capitalising on emerging tourism trends such as Geo-tourism.
- Action 7.6: Develop new and expand existing Aboriginal and Torres Strait Islander owned and operated tourism enterprises.
- Action 7.7: Enhance the visitor experience through use and availability of technology.



Glossary

ABS – Australian Bureau of Statistics

ADL – Adelaide

AEDA – Adelaide Economic Development Agency

ATDW – Australian Tourism Data Warehouse

CBD – Central Business District

DTI – Department of Transport and Infrastructure

DEW – Department of Environment and Water

EA – Ecotourism Australia

EDM – Electronic Direct Mail

RDAAHFKI – Regional Development Australia Adelaide Hills, Fleurieu
and Kangaroo Island

SA – South Australia

SATC – South Australian Tourism Commission

TiCSA – Tourism Industry Council South Australian

TA – Tourism Australia

TDAP – Tourism Destination Action Plan

TRA – Tourism Research Australia

VIC – Visitor Information Centre (accredited)

VIO – Visitor Information Outlet

WATA – Western Adelaide Tourism Alliance

