

SOUTH AUSTRALIAN TOURISM COMMISSION

# CORPORATE PLAN

2023 - 2026



[SOUTH AUSTRALIA.COM](https://southaustralia.com)

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## ACKNOWLEDGEMENT OF COUNTRY

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

The South Australian Government acknowledges and respects Aboriginal people as the state's first people and nations and recognises Aboriginal people as traditional owners and occupants of South Australian land and waters. The South Australian Government acknowledges that the spiritual, social, cultural, and economic practices of Aboriginal people come from their traditional lands and waters, and that Aboriginal people maintain cultural and heritage beliefs, languages and laws which are of ongoing importance today.

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



Above

Ngaut Ngaut Conservation Park, Murray River, Lakes & Coorong

Cover

Deep Creek National Park, Fleurieu Peninsula

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## MESSAGE FROM THE CHAIR AND CHIEF EXECUTIVE OFFICER OF THE SATC

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What incredible inroads we've made on tourism recovery in South Australia. Our state's tourism industry has not only reclaimed its pre pandemic value but has surpassed it - reaching a new all-time high. By December 2022, visitor expenditure in South Australia hit \$8.3 billion, up on the once record \$8.1 billion of late 2019 when our last corporate plan was released and before the global pandemic brought tourism to a standstill.

Having steered our industry out of its COVID-induced low point of \$4.4 billion in March 2021 is a remarkable achievement, and it puts us in great stead as we now plan ahead to 2026.

Building on this strong momentum as business and consumer confidence continues to grow, we have a fantastic opportunity to re-define our marketing and develop a long-term brand platform by telling a uniquely South Australian story. With the brand as the foundation, we will evolve our strategy to develop South Australia as a leading and distinct destination. Collaboration with our wide range of stakeholders will be important to define who we are and what it means to be uniquely South Australian.

We now have our sights set on our original target of growing the value of tourism to \$10.3 billion by June 2026, on our way to \$12.8 billion by 2030. This is an ambitious goal, and one we are confident we will reach. Total visitor expenditure has already recovered, with exceptional strength in many of our domestic markets. The next challenge of the remaining COVID era impacts, will be rebuilding our key international markets.



**ANDREW BULLOCK**

Chairman  
South Australian Tourism Commission



Guiding our actions to deliver this growth will continue to be the six strategic priorities outlined in our South Australian Visitor Economy Sector Plan 2030: Marketing, Experience and Supply Development, Collaboration, Industry Capability, Leisure Events and Promoting the Value of the Visitor Economy. Sustainability will also play an important role, making responsible decisions for our environment, our community and our economy.

Tourism is a key component of our state's economy. It generates employment, supports businesses and local communities, with the benefits flowing into a range of other industries. The beauty of tourism is that its impact is not just confined to our sector. When visitors to our state choose to spend their hard-earned money, it is felt across the board from wine and agriculture to retail, transport and our natural resources.

South Australia has so much to offer from exceptional food and drink to immersive nature and wildlife experiences to world class events and festivals. Over the next three years we will continue to position South Australia as a leading and distinctive destination by developing and telling our South Australian story to the nation and the world. We will attract new and exciting events and work with our operators to develop exceptional products and experiences that drive visitation.

We look forward to working with our key stakeholders across government and industry to ensure visitors #SeeSouthAustralia and take tourism in our state to new heights.



**EMMA TERRY**

Chief Executive Officer  
South Australian Tourism Commission





## OUR VISION

### Our Vision

To grow the Visitor Economy in South Australia to its full potential, working collaboratively with industry and our community to reap the benefits of South Australia's natural environment, rich cultural heritage and built assets in a sustainable and enriching way.

### Our Purpose

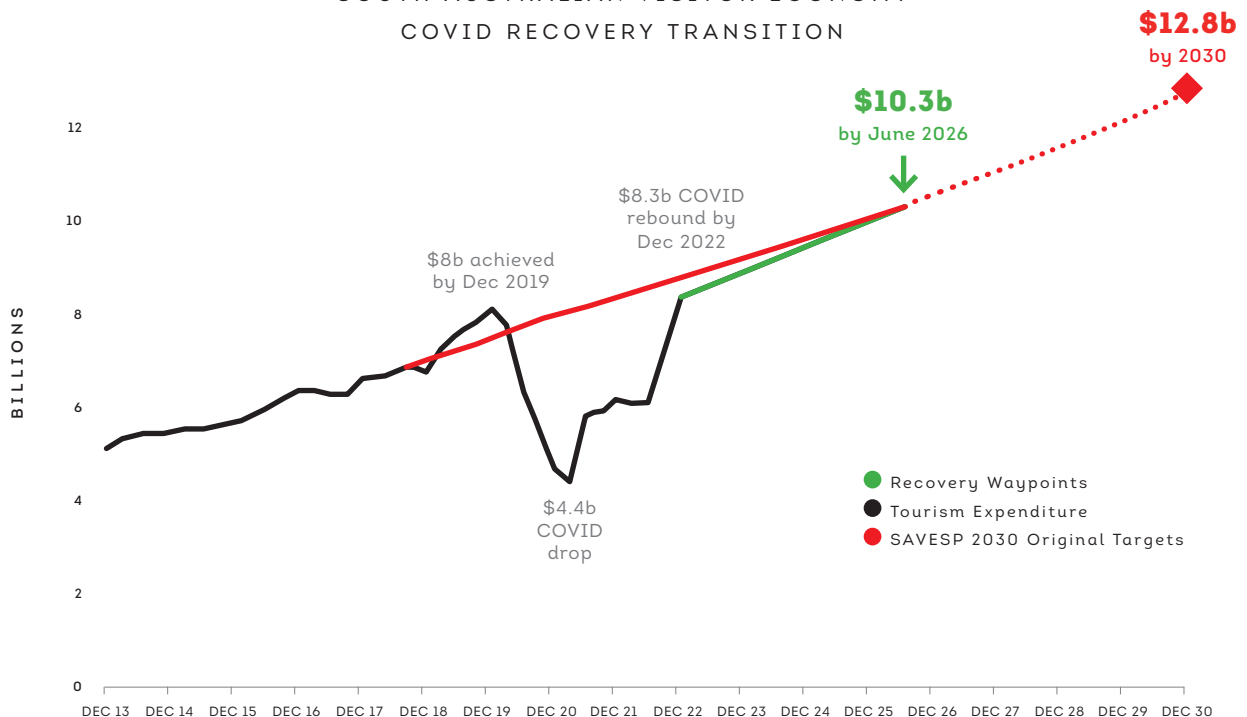
The South Australian Tourism Commission (SATC) was established as a statutory corporation under the *South Australian Tourism Commission Act 1993* to assist in securing economic and social benefits for the people of South Australia through promoting and developing the state as a tourism and events destination.

### The Goal

Rebuilding our Visitor Economy from the impacts of COVID, and then growing beyond this to \$10.3 billion in visitor expenditure by June 2026. Over the term of this plan this will see an additional 10,000 direct jobs in our sector. This growth will be spread across the entire Visitor Economy.



## SOUTH AUSTRALIAN VISITOR ECONOMY COVID RECOVERY TRANSITION



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## WHAT UNDERPINS OUR ORGANISATION

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### PROMOTE THE APPEAL OF SOUTH AUSTRALIA

**Exceptional Food and Drink Experiences**

**Immersive Nature and Wildlife Experiences**

**World Class Events and Festivals**

### OUR VALUES



#### **Go Boldly**

We thrive on taking risks and enjoy stepping outside our comfort zone.



#### **Dig Deeper**

We never settle for simply scratching the surface. We're hungry for knowledge, fresh ideas and innovations.



#### **Can Do**

We believe there's nothing we can't do as a team.



#### **Share The Love**

We have a passion for excellence and exceeding expectations.

### ORGANISATIONAL EFFECTIVENESS

#### **Evidence based decision making**

Use accurate, relevant and concise insights to inform all SATC business decisions through effective collection, analysis and presentation of research to underpin strategy.

#### **Governance and protocol**

As a Statutory Authority, provide proactive, coordinated and timely support services to the Board and Minister to ensure good quality governance and compliance is maintained across the SATC.

#### **Workforce and culture**

Support a culture aligned with our organisational values to maximise employee engagement and retention, empower sustainable practices and build organisational capability.

#### **Business support**

Provide high quality systems and support services across the SATC to ensure the organisation achieves its objectives in a manner which maximises the effective, efficient and sustainable use of allocated resources, identifies and manages risk and meets its public accountability expectations.

#### **Enabling a positive operating environment**

Provide policy advice and proactively identify relevant issues and opportunities for the benefit of the Visitor Economy. Represent the SATC in external decision making where there is an impact to the tourism industry and advocate for positive industry outcomes.



Location

Langton Island, Eyre Peninsula

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## STRATEGIC PRIORITIES FOR THE SATC 2023 - 2026

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The key strategic areas for the tourism industry in South Australia are outlined in the South Australian Visitor Economy Sector Plan 2030 and will drive how the industry work towards achieving the \$12.8 billion by 2030, with a milestone for this Plan of achieving \$10.3 billion by June 2026. The term of this 3-year plan represents 10,000 additional jobs in South Australia. The SATC Corporate Plan 2023-26 is structured around our key strategic priorities and aligns with the broader State Government priorities as outlined in the South Australian Economic Statement.







### Marketing

To build awareness and consumer demand of the South Australia tourism destination brand, products and experiences; leverage partnerships that drive consideration and conversion by increasing demand for visitation to South Australia.

- Effectively target high value intrastate, interstate and international travellers to ensure sustainable growth, maximising expenditure outcomes.
- Define and develop sub-groups of the broader market to ensure marketing messaging is tailored, relevant and impactful.
- Consistently communicate South Australia's key brand pillars, ensuring a strong narrative for all areas of the state, leading to conversion from trip intention to an actual booking.
- Focus on developing cutting edge digital and social user experiences for our consumers.
- Optimise existing platforms and leverage emerging platforms and new methods of communicating and engaging with the consumer to drive brand awareness and saliency.
- Promote and encourage consumer advocacy for South Australia by leveraging brand ambassadors and driving positive word of mouth.
- Monitor and maintain current international markets, while researching and pursuing emerging markets, prioritising those with the greatest return on investment.
- Strengthen and develop relationships with the travel trade to educate consumers and promote South Australia.
- Ensure that marketing decisions are underpinned by relevant and reliable consumer insights.



### Experience and Supply Development

To lead the supply-side development of tourism in and to South Australia, including increasing aviation access and cruise visitation.

- Work with operators and investors to enable innovation and continuous improvement of tourism offerings throughout the state, including supporting and advocating for significant new experiences and infrastructure, with a focus on sustainability.
- Identify gaps and facilitate actions around sustainably increasing access to and through South Australia, with a focus on aviation, cruise, road, rail and trail infrastructure.
- Encourage investment and partnership opportunities between public and private sector in tourism infrastructure, including administration and funding programs such as the Experience Nature Tourism Fund.
- Support operators and other stakeholders to leverage funding sources from outside the state to drive investment in South Australian tourism.



### Collaboration

Working together between government and industry to leverage positive outcomes for the Visitor Economy in South Australia.

- Facilitate cross-government cooperation to create a positive environment for the Visitor Economy, driving job creation, investment and expenditure in South Australia.
- Work with other states, territories and Tourism Australia to ensure South Australia is well represented.
- Foster regular, sustainable and constructive partnering between operators, key industry bodies and local, state and federal government.
- Proactively engage with the Tourism Industry Council of South Australia (TiCSA) to identify collaborative opportunities.
- Be an active leader in engaging broader government on the opportunities for investment and engagement of the sector.
- Where appropriate, integrate leisure events into broader areas of growth in trade, investment and industry in South Australia in line with South Australia's broader government priorities.
- Work with regions to support the delivery of the Regional Visitor Strategy 2025, driving cross-regional collaboration and regional expenditure.



### Industry Capability

Support the capability of tourism operators to ensure industry sustainability and high-quality experiences for consumers.

- Connect industry with access to relevant tourism training and development programs to assist in filling skills gaps across marketing, events and business development.
- Provide South Australian tourism businesses with access to tools and resources to engage their consumers and drive profitability.
- Develop and deliver the capacity building program for major, regional and local events and festivals across South Australia.
- Work alongside industry organisations such as regional development boards as well as local, state and federal government to recover labour supply and drive skills development.
- Encourage operators to offer more commissionable product.



### Leisure Events

Promote South Australia as a tourism destination and attract visitors to the state through securing, managing, developing and supporting world class leisure events and festivals and providing leadership to the events and festivals industry.

- As the lead Government agency, deliver, grow and enable world class, sustainable events in South Australia.
- Grow total leisure events expenditure through the targeting of high value individuals.
- Grow South Australia's strong brand perception of festivals and events amongst interstate audiences.
- Develop new, sustainable events and grow our managed events and experiences to attract repeat visitation and tell South Australia's story:
  - Santos Tour Down Under
  - Tasting Australia presented by RAA Travel
  - National Pharmacies Christmas Pageant
- Focus event sponsorship investment on core strength areas of South Australia.
- Grow the South Australian leisure events calendar, considering a balance between types of events and location, ensuring all of South Australia benefits from events and festivals.
- Work collaboratively with commercial organisations, the community and government to generate revenue for Adelaide and regional events and communities.



### Promoting the Value of the Visitor Economy

Tourism is critical to the South Australian economy. It generates export revenue, drives investment, creates confidence and state pride and provides new dollars to the economy that results in jobs and wealth for South Australia.

- Continue to quantify and tell the story of the Visitor Economy to Government, regional partners and industry, focussing messages around sustainability, jobs, regional expenditure, investment and impact on the broader economy.
- Ensure that there is consistent strong messaging that tourism continues to be a business proposition, and this is advocated for when talking about the value of the Visitor Economy.
- Seek to leverage third party endorsement to communicate the value of the Visitor Economy.
- Ensure clear messaging on the SATC's corporate purpose and ensure the community sees the benefits of tourism activities.



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## MEASURING OUR SUCCESS

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With an ambition of not only full recovery from the impacts of COVID, but a return to our previous ambitious goal of \$10.3 billion by June 2026, this plan outlines the key performance metrics, and is linked directly to the outcomes described in the South Australian Visitor Economy Sector Plan 2030. The SATC will continue to report our progress around visitor expenditure, benchmark our industry performance against others (particularly other states of Australia) and also assess growth in our regions. We will monitor the implementation of the Corporate Plan and measuring the impact of our work. Formal measurement and evaluation of the SATC's performance will be undertaken as part of each annual Operational Plan, be reported formally to our Board and in the SATC Annual Report. In addition, each of the SATC Business Units will conduct regular reviews of activity against established Key Performance Indicators.

The recent surge in visitor expenditure indicates that COVID recovery has occurred much sooner than expected and we are now able to again ambitiously plan for the future. While not only reinstating our \$10.3 billion goal for 2026, the recovery surge means that we are now confident to go even more boldly with several subsectors.

The Regional Visitor Strategy 2025 set a goal of reaching \$4 billion, and due to the strong recovery currently underway, we have raised that to \$4.6 billion. The SATC International Marketing Strategy outlined a \$1.2 billion goal, which has been raised to \$1.5 billion. Likewise we have increased our targets for Arts and Cultural Tourism and Aboriginal Tourism.



## DEMAND SIDE METRICS

METRIC	BASELINE DEC 2019	LATEST AVAILABLE DEC 2022	TARGET JUN 2026
Total Visitor Expenditure	\$8.1b	\$8.3b	\$10.3b
International Visitor Expenditure	\$1.2b	\$0.5b	\$1.5b
Interstate Visitor Expenditure	\$2.7b	\$3.2b	\$3.6b
Intrastate Visitor Expenditure	\$2.6b	\$2.8b	\$3.1b
Day Trip Expenditure	\$1.7b	\$1.8b	\$2.1b
Regional Expenditure	\$3.6b	\$4.0b	\$4.6b
Leisure Events Expenditure	\$383m	\$399m	\$564m
Arts and Cultural Tourism Expenditure	\$1.4b	\$1.2b	\$1.5b
Aboriginal Tourism Expenditure	\$252m	\$175m	\$216m
'Good Food and Wine' Interstate Association	58%	53% (Feb 2023)	62%
'Festivals' Interstate Association	30%	26% (Feb 2023)	34%

### Notes on Demand Side Metrics

- While the headline expenditure target of \$10.3 billion is the original waypoint SAVESP2030, the component parts have been adjusted to reflect COVID impacts, most significantly reflecting the strong domestic market counterbalancing the more slowly recovering international market.
- Expenditure definition and targets are taken from the relevant published figures, including the International Tourism Strategy, Regional Visitor Strategy and the Arts and Cultural Tourism Strategy.
- Association with 'Good Food and Wine' and 'Festivals' has slightly declined over the past two years and the targets set reflect the intended recovery and further intended growth.

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## SUPPLY SIDE METRICS

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METRIC	BASELINE DEC 2019	LATEST AVAILABLE DEC 2022	TARGET JUN 2026
Tourism Jobs	40,500 (Jun 2019)	37,300 (Jun 2021)	46,000
International Air Capacity	16,000	10,500	15,100
Domestic Air Capacity	85,000	82,000	95,000
Cruise Port Arrivals	82	103	>100 (Expenditure target to be developed)
Room nights sold in Adelaide	2.63m	2.53m	2.91m
Room nights sold in regions	1.28m	1.48m	1.5m

SATC DIRECT IMPACT METRICS

METRIC	BASELINE DEC 2019	LATEST AVAILABLE DEC 2022	TARGET JUN 2026
Interstate campaign: Awareness	8%	10%	11%
Interstate campaign: Appeal	42%	45%	50%
Interstate campaign: Consideration	31%	37%	33%
Intrastate campaign: Awareness	19%	23%	30%
Intrastate campaign: Appeal	49%	49%	62%
Intrastate campaign: Consideration	40%	45%	45%
southsuustralia.com ATDW referrals	635,000	1,948,813	2,300,000
southaustralia.com monthly active users (12 month average)	445,000	610,000 (Including GSV traffic)	600,000
Trip planner monthly active users (12 month average)	Not available	353	3,000
Total corporate site visits	266,812	376,335	576,000
Research usage page views	36,000	19,512	43,000
Events: Santos Tour Down Under Economic Impact	\$70.7m	No event	\$92.0m

**Notes on Direct Impact Metrics**

- All campaign target metrics have been set based on a review of previous trends and an assessment of the campaign benchmarks based on previous SATC campaigns.
- SouthAustralia.com monthly active users: YTD Dec 2022 figures were inflated by GSV campaigns. As such, growth to 600,000 targeted by 2026 is ambitious.
- Trip planner monthly active users: Trip planner was launched in Jan 2022 with usage only starting from Mar 2022, and the Dec 2022 figure is a ten-month average usage measure. The rolling 12-month average is estimated to grow to 3000 by the end of 2025/26.

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## ORGANISATIONAL EFFECTIVENESS METRICS

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METRIC	BASELINE DEC 2019	LATEST AVAILABLE DEC 2022	TARGET JUN 2026
Employee engagement	81%	78%	>75%
Performance development plans conducted	94%	95%	>90%
SATC accounts paid within required timeframe	99.77% (Jun 2019)	99.98% (Jun 2022)	>99%
Annual variance of actual spend against budget	-0.3% (Jun 2019)	-0.3% (Jun 2022)	-/+ 0.5%
SLA target response rate to every ICT request within 1 business hour	Not collected in 2019	100% (Dec 2022)	>90%
SLA customer satisfaction on ICT requests	Not collected in 2019	Avg rating of 100% in the past 30 days	>80%

**Notes on Organisational Effectiveness Metrics**

- All 2023 and 2026 targets relate to industry benchmarks or mandated levels, and all goals are to continue to exceed these minimum standards.





Above Tasting Australia presented by RAA Travel, Adelaide

## CONTACT US

### Strategy & Insights

[researchservices@sa.gov.au](mailto:researchservices@sa.gov.au)

### Postal address

GPO Box 1972,  
Adelaide South Australia 5001

### Websites

[southaustralia.com](http://southaustralia.com)

[tourism.sa.gov.au](http://tourism.sa.gov.au)

