

TOURISM PLAN 2020



ECONOMY

A diverse and resilient
local economy

*I WANT
TO STAY*



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EXECUTIVE SUMMARY

Tourism is a key economic driver for Holdfast Bay that has significant positive flow-on effects for the local community. In 2016, visitors contributed \$262 million to the local economy, providing an estimated 1467 full time equivalent jobs.

The Tourism Plan 2020 sits under Council's Strategic Plan and aligns with the State Tourism Plan. The Our Place Strategic Plan 2030 focuses on a welcoming, safe and active community where resident, visitor and business prosperity meets. It encompasses five strategic pillars which outlines objectives to effectively build for our future. The Tourism Plan aligns with objective 4 of the economy pillar.

Objective 4: Boost our Visitor Economy;

- Implement City of Holdfast Bay Tourism Plan 2020 strategic priorities
- Implement Western Alliance Tourism Destination Action Plan
- Develop City of Holdfast Bay Tourism Destination Management Plan
- Develop a Visitor Servicing Strategy

TOURISM VISION

The City of Holdfast Bay is committed to a lively, diverse, safe and accessible tourism destination for visitors and residents alike whilst ensuring sustainability and economic benefits for our community and region.

OUR FOCUS

TARGET MARKETS

INDUSTRY

OUR EXPERIENCES

DESTINATION MANAGEMENT FRAMEWORK

PLANNING

MANAGEMENT

DEVELOPMENT

MARKETING

STRATEGIC PRIORITIES

DRIVING
DEMAND

VISITOR
EXPERIENCE

TOURISM INNOVATION
AND SUSTAINABILITY

CONSULTATION AND
PARTNERSHIPS

2020 TARGET

Increase visitor numbers by 25% and reach \$335 million in tourism expenditure for the local economy.

STAY FREE





Photo: Study Adelaide

INTRODUCTION

In 2016, 1,093,000 people made day trips to our City and another 202,000 people made over-night visits, staying 430,888 visitor nights per year. The majority of visitor expenditure in the region is generated by domestic overnight visitors (\$122 million).

Tourism at a State and National level

Tourism is already an important driver of the South Australian economy. In the year to December 2016 6.2 million overnight visitors spent \$6.3 billion in South Australia across 18,000 tourism businesses, directly employing 36,000 South Australians. The South Australia Tourism Plan 2020 sits within the Australia wide approach of Tourism 2020 and further recognises the significant potential for tourism growth. The Plan is focused on achieving the local industry's full potential of \$8 billion of visitor expenditure by 2020, which will generate nearly 10,000 additional direct jobs in the South Australian economy.

Tourism Australia 2020 Strategy is committed to an ambitious target of doubling the value of the visitor economy to the nation from \$70 billion to \$140 billion, driven by growth in inbound travel (particularly from Asia) and supported by continued growth in the domestic market. "There's nothing like Australia" is Tourism Australia's global consumer marketing campaign highlighting some of the very best attractions and experiences Australia has to offer. In 2017 the campaign will continue to focus on Australia's strengths in food and wine as well as placing renewed focus on our world class aquatic and coastal experiences – both major decision making factors in Australia's key international tourism markets. In addition, Tourism Australia will roll out initiatives to promote Indigenous tourism and high-impact events.

Tourism in the City Of Holdfast Bay

Holdfast Bay supports the local and State economy by attracting domestic and international visitors whose expenditure helps to create jobs. Tourism expenditure in Holdfast Bay has grown from \$181 million in 2012, to \$262 million in 2016, and visitation has grown by over 50%. Almost 80% of visitors to Adelaide spend time in Holdfast Bay, and the City acts as a gateway to the State's most popular regions.

At the core of the 'visitor economy' is the economic activity of visitors, but its impact is much broader, embracing all of the elements that make for a successful visitor destination, including; hospitality, transport, education, retail, community programs and many other industries and activities that affect a visitors' travelling experience. It also includes those travelling for purposes other than tourism, for example employment, education or business.

Holdfast Bay recognises that successful tourism requires strategic planning where visitors' expectations are balanced against the needs of residents. Tourism that is well planned and managed generates widespread benefits to a city. Local businesses benefit financially, the local community benefits from improved services, facilities and infrastructure, and the environment benefits through greater investment in sustainable development.

OUR FOCUS



TARGET MARKETS

Target marketing and segmentation ensures that destination development and marketing activities are focused on those markets that will provide the greatest potential to deliver growth in the region.

Our tourism segments have been based on types of visitors and not on specific demographics. Holdfast Bay's key target segments have been identified through research and consultation:

- In-destination leisure visitors (interstate and international)
- Regional South Australians
- Local Adelaide day trippers
- Holdfast Bay residents
- Visiting friends and relatives (VFR)

The local Adelaide day tripper market will continue to be a key focus, however longer term destination development will need to attract a greater percentage of interstate and international leisure visitors as they represent the largest growth opportunity and tend to stay longer and spend more money while on holiday.

Visiting friends and relatives is a significant travel market within both domestic and international tourism accounting for 35% of visitors to Holdfast Bay. It is therefore important to understand the role of the hosting resident in influencing and advocating for the tourism experiences in the local area. Locals play a key role in planning the activities of their visiting friends and relatives, Council encourages residents to be ambassadors for our local area.

More research needs to be undertaken on potential high yield growth markets including; Asia and China with increased flights direct to Adelaide; education and business travellers; cruise; cycling and cultural enthusiasts.



INDUSTRY

The City of Holdfast Bay recognises the need for participation and partnerships in order to achieve the desired tourism outcomes.

Council will look to strengthen networks and connections across local government, precincts, businesses and associations as outlined below to collaborate and to highlight key issues, developments and successes. A key focus will be working with industry to establish and monitor benchmarks for quality tourism development and service delivery to ensure consistency.

- Holdfast Bay's visitor businesses
- Visitor information centres
- All tourism sectors – accommodation, recreation, attractions, events and conferences, food and beverage, transportation, travel trade
- Retail precinct associations
- Local councils – western and southern alliances, Adelaide alliance

- State Government – South Australian Tourism Commission, Local Government Association of South Australia, State Development, Office for Recreation and Sport, Education Adelaide, Environment, Water and Natural Resources, Planning, Transport and Infrastructure
- South Australian Tourism Industry Council
- Adelaide Convention Bureau

Council will continue to work in partnership with key stakeholders to build and promote a vibrant and diverse tourism experience with the primary objective of increasing visitation, length of stay and money spent in Holdfast Bay.

OUR EXPERIENCES



A destination's products, attractions and experiences drive a visitor's destination choice. Our experiences represent the key unique selling points of the region and under-pin the tourism industry of Holdfast Bay.

A key focus is to increase the range, quality and diversity of existing and new tourism experiences in line with visitor needs and expectations. This will encourage increased visitation and long term sustainability.



EVENTS

Vibrant community events play a vital role in increasing visitation and economic development. One of Holdfast Bay's greatest strengths is its impressive calendar of public events. More than 200 public events and festivals are staged throughout the year, attracting over 500,000 event-specific visitors and generating in excess of \$16 million worth of media coverage, reaching an audience of 53.9 million people. Thanks to its close proximity to the State Aquatic Centre, sporting fields and golf courses, Glenelg provides accommodation for people attending many large sporting events that take place in Adelaide including the Panda Australian Women's Golf Open and Pacific School Games, each with more than 4,000 competitors.

Future Direction

Develop new and build-on existing events that:

Align with and attract Council's desired target markets to achieve the best return on investment for Council and the community.

Align with Council's strategic direction, achieves a balance between Council resources and visitor, business and resident expectations.

RETAIL

Retail plays an important role in the local economy, attracting and servicing visitors and providing local jobs. The retail sector is the third largest employer, accounting for 15.3% of the Holdfast Bay workforce, creating over 2000 local jobs. The City of Holdfast Bay has four major retail precincts; Jetty Road Glenelg; Marina Pier Glenelg; The Broadway Glenelg South; and Jetty Road Brighton. These areas are key retail precincts for the local community as well as for visitors.

Future Direction

Enhance and promote our retail precincts as vibrant shopping and recreational areas that contribute to the fabric of the community as meeting places and social hubs with year-round appeal to residents and visitors.

OUR EXPERIENCES



ACCOMMODATION

Holdfast Bay's accommodation sector has an economic value of \$95 million significantly supporting local suppliers of goods and services. There are over 32 accommodation properties offerings, approximately 3000 beds. There is also an expanding "sharing economy" with over 60 rental properties offering 150 rooms in Holdfast Bay via Airbnb.

Future Direction

To support a sustainable, productive and profitable year-round accommodation industry that supports local, State and national economies.

NATURE AND WILDLIFE

Holdfast Bay's natural environment is a valuable asset and provides compelling reasons for interstate and international visitors to choose our area over others. Situated on 11 kilometres of coastline foreshore there is a diverse range of natural experiences including dolphin tours, swimming, sailing, snorkelling, scuba diving, stand-up paddle boarding and fishing. Visitors can experience viewing and swimming with wild dolphins in their natural habitat as well as unique underwater snorkelling and dive tours from the Glenelg Jetty. There are a range of fishing charters operating fishing adventures in the shallow gulfs populated by snapper and King George whiting.

Future Direction

Locals and visitors will have opportunities to immerse themselves in the natural environment and engage in authentic experiences.



SPORTS AND LEISURE

From cycling or walking along high-quality recreational trails, to cricket and football at historic Glenelg Oval, surf lifesaving, beach volleyball and golfing – sport shapes Holdfast Bay’s character. Glenelg Oval serves as a host ground for top-level local sports clubs, and is also a satellite site for South Australian cricket matches when Adelaide Oval is unavailable. Holdfast Bay regional sports hubs offer shared-use facilities that support a range of activities, user groups and services. The \$14.6 million Kauri Parade Sporting and Community Precinct at Seacliff was completed in 2017 which provides cutting edge facilities. Sports and recreation is a diverse sector providing flow-on benefits and opportunities to a wide range of people, from turf managers and sports administrators to trainers, coaches, officials and athletes, educators, event managers, and tourism and retail operators.

Future Direction

To enhance the quality, function and efficiency of sport and leisure infrastructure and facilities that connect the community and visitors within Holdfast Bay.

CULTURE AND HERITAGE

Art, history and places of cultural significance play an important role within Holdfast Bay. They represent not only sources of identity and meaning to the community but strategic tools for economic growth and development. Holdfast Bay’s historical sites include indigenous monuments and gardens, Tjilbruke Springs, the History Centre, the Bay Discovery Centre, Kingston House, Partridge House and the Glenelg Air Raid Shelter.

Future Direction

To enrich and connect locals and visitors through art, history and places of cultural significance within Holdfast Bay.

OUR DESTINATION MANAGEMENT FRAMEWORK

Successful tourism must be based on more than marketing initiatives. It requires destination planning, management and development.

A destination management framework supports:

- Improved destination competitiveness
- Increased visitor satisfaction
- Economic, social and environmental sustainability
- Effective partnerships
- Continuous improvement

It also assists in identifying the key focus areas and the development of the action plan to maintain Holdfast Bay as a competitive tourism destination. Our destination management framework outlines a set of values that encourage a process of continuous improvement, early awareness of emerging trends, effective partnerships, minimising conflicts, controlling environmental impacts, ongoing investment in tourism, community support and ultimately visitor satisfaction.





STAY LOCAL



OUR STRATEGIC PRIORITIES

A series of high level strategies have been outlined under four focus areas to deliver the tourism vision.

1. Driving demand
2. Visitor experience
3. Tourism innovation and sustainability
4. Consultation and partnerships

A detailed Tourism Action Plan and a localised Destination Management Plan will be developed to execute the strategies for the long-term success and sustainability of Holdfast Bay.

1. DRIVING DEMAND

Ref	Strategy
1.1	Promote Holdfast Bay profile to regional, national and international markets
1.2	Secure investment through Council, grants, government funding and private investment for major infrastructure projects that enhance visitor experience and drive demand
1.3	Support product development
1.4	Enable growth by leveraging Council tourism assets
1.5	Increase media reach and value
1.6	Position as a regional gateway
1.7	Attract or develop high value events of national and international significance that will increase overnight stays in Holdfast Bay

2. VISITOR EXPERIENCE

Ref	Strategy
2.1	Elevate visitor needs and expectations
2.2	Create a strong visitor appeal
2.3	Facilitate continual improvement across Council services, events and activities
2.4	Build brand advocates
2.5	Enhance the City's image through event development and branding
2.6	Understand the key role technology plays in Tourism
2.7	Develop a retail strategy for Jetty Road Glenelg and surrounding retail precincts Marina Pier, The Broadway and Jetty Road Brighton

OUR STRATEGIC PRIORITIES

3. TOURISM INNOVATION AND SUSTAINABILITY

Ref	Strategy
3.1	Increase recognition of the value of tourism and the experiences available
3.2	Tourism is considered and integrated across departments
3.3	Attract new markets
3.4	Empower residents and the local business community to be ambassadors for visitors in their area
3.5	Analyse the accommodation industry to support a sustainable future
3.6	Encourage the effective, integrated and consistent approach to management of our destination
3.7	Encourage events that offer the best opportunity for economic growth and add value to residents wellbeing and the local business community

4. CONSULTATION AND PARTNERSHIPS

Ref	Strategy
4.1	Build and maintain relationships with Western Adelaide Alliance and Southern Adelaide Councils to promote regional transport connections
4.2	Maximise membership with South Australian Tourism Industry Council (SATIC)
4.3	Maintain key relationships within the South Australian Tourism Commission (SATC)
4.4	Maximise membership with Adelaide Convention Bureau (ACB)
4.5	Establish formal lines of communication between the Council, traders, landlords, tourism providers and the community for future precinct planning
4.6	Community engagement
4.7	Stakeholder engagement
4.8	Develop and maintain relationships between events and tourism partners



MONITORING AND REVIEW

To ensure the currency and continued relevance of the Tourism Plan, an annual review of the strategies will be undertaken. Given the changing nature of the industry, it is expected that modifications will occur over time to ensure the plan remains relevant, achievable and measurable.

The review will incorporate:

- Progress against the strategies outlined in the Tourism Plan and Strategic Plan
- A review of visitor numbers, expenditure and accommodation nights
- A review of trends and changes which may impact the plan
- Review of responsibilities and resources
- Consideration of upcoming actions and their implementation
- A review of event research and economic impact including media coverage, audience attendance and reach
- Estimated ROI for Council – for every dollar invested by Council on tourism, marketing and events to what is returned to the local economy

Success will be measured via visitation, visitor expenditure and accommodation nights. The 2020 goal is to increase total visitor numbers by 25% and reach \$335 million in tourism expenditure for the local economy.



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I WANT TO STAY

TOURISM PLAN 2020



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