

TOURISM RECOVERY PLAN 2023



ECONOMY

A diverse and resilient
local economy

*I WANT
TO STAY*

Acknowledgement of Country

The City of Holdfast Bay acknowledges the Kaurna People as the traditional owners and custodians of the land. We respect the spiritual relationship with Country that has developed over thousands of years, and the cultural heritage and beliefs that remain important to the Kaurna People today.





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EXECUTIVE SUMMARY

Tourism is a key economic driver for the City of Holdfast Bay's economy that has significant positive flow-on effects for the local community. In 2019, visitors contributed \$258 million to the local economy, providing an estimated 1,808 full time equivalent jobs. The majority of these jobs are in businesses that provide goods and services directly to visitors, such as accommodation, cafes and restaurants, and retailing.

The Tourism Recovery Plan aligns to Council's Strategic Plan and 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 Recovery Plan aligns with objective 4 of the economy pillar.

INCREASE THE NUMBER OF VISITORS TO THE CITY OF HOLDFAST BAY

The Tourism Recovery Plan 2023 is a post COVID-19 rebuilding strategy, together with the Economic Activation Plan 2023, to restimulate tourism in our region. It provides a focus and action plan to emerge as a more resilient and sustainable destination that enriches the lives of our people and our visitors.

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 suitability and economic benefits for our community and region.

2023 TARGET

Return visitation and expenditure to pre-COVID-19 levels - 1.4 million visitors and \$265 million in tourism expenditure annually.





INTRODUCTION

TOURISM AT A STATE LEVEL

The South Australian Tourism Commission is committed to growing South Australia's visitor economy to \$12.8 billion and generate an additional 16,000 jobs in South Australia by 2030. Tourism is an economic priority currently employing 40,500 South Australians and the visitor economy in South Australia was growing strongly with the record result of \$8.1 billion in visitor expenditure year ending December 2019. The Adelaide region makes up 57% market share of the visitor expenditure.

The South Australian visitor economy is in the middle of the most severe reduction of tourism on record due to the crises of 2020. While we have already seen significant drops when comparing the current results (year to June 2020) to the 2019 calendar year, far more significant declines will be felt in future releases with the closure of international and interstate borders.

TOURISM IN THE CITY OF HOLDFAST BAY

The City of Holdfast Bay supports the local and State economy by attracting visitors whose expenditure helps to create jobs. These visitors, which include international, interstate, intrastate and day trip visitors, provide benefits to the economy through the direct contributions of their tourism activities, as well as encompasses the contribution tourism makes to employment, investment, infrastructure development, exports and provision of temporary labour and social vibrancy.

The economic activity of visitors impacts 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 for employment, education or business.

The City of 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.

In 2019, 1.3 million people made day trips to our City and another 140,000 people made over-night visits. Tourism expenditure in the City of Holdfast Bay has grown over the last five years from \$215 million in 2015 to \$258 million in 2019. In the City of Holdfast Bay, tourism supports an estimated 1,800 jobs, which is 14% of total employment.

VISITOR ECONOMY IMPACTS OF COVID

The visitor economy has grown significantly in South Australia over the last five years but due to COVID-19, tourism is one of the hardest hit sectors. It is important to observe industry impacts and trends that will shape the recovery. Performance will be at its lowest come March 2021 as we reach 12 months of COVID-19 impacts. It is anticipated that South Australia will reach a low of \$2.3 billion.

COVID-19 has also led to profound changes on tourists' behaviour and expectations on industry operations which are predicted to have long-lasting impacts.

The City of Holdfast Bay is estimated to be the worst impacted among Greater Adelaide LGAs in terms of percentage jobs lost and jobs compensated by JobKeeper payments (982 jobs lost and 1,247 jobs compensated by JobKeeper payments - predominantly retail trade / accommodation and food services) representing -15.7% change in the Apr-June quarter 2020.

Tourism businesses received a total of 3,832 bookings cancelled and an estimated \$9 million loss in accommodation revenue sales, 40,000 guest arrivals and 90,000 room nights in the Apr-Jun quarter 2020.

Recovery of the international market is predicted to take two to four years. This represents a loss of \$39.5 million annually, a key market for the City of Holdfast Bay.

With no international or interstate visitors or major events being held visitation decreased by 44% to 827,000 and expenditure by 50% to \$128 million in 2020.

OUR FOCUS

TARGET MARKETS

While many will immediately think of leisure tourism when they hear visitor economy, it is important to understand that it encompasses so much more than the traditional tourism categories of hotels, tours and airlines. The visitor economy is all spend associated with visitors.

There are currently four key markets within the South Australian visitor economy – international, interstate, intrastate and domestic day trip visitors. Their behaviours, itineraries and most importantly, expenditure per visitor, are very different.

Visiting friends and relatives is a significant travel market within both domestic and international tourism accounting for 29% of visitors to the City of 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.

Due to COVID-19 the City of Holdfast Bay will need to redefine our target markets based on their ability and tendency to travel. There will need to be a new approach to reach local audiences and driving multi-layer activations.

Short Term Target Markets

- Encourage local return visitors - easier and more productive than seeking new target markets
- Maximize domestic day trip audience market share over other destinations
- Attract individuals and groups visiting friends & relatives (VFR) visitors – resilient repeat visitors, incentive to visit, reuniting families & friends going out together, less critical of gaps in the product offering
- Intrastate / regional SA overnight visitors – stay longer

Long Term Target Markets

- Metro visitors that only visit once per year
- Interstate / domestic overnight visitation
- International

Target Market Segments

Three customer groups have been identified that are most likely to stay longer, spend more and disperse in the region. They have the greatest affinity with the tourism experiences the City of Holdfast Bay has on offer and they have the greatest likelihood of becoming advocates for the region.

- Young couples no children aged 25 – 45
- Families with school age children (Parents 35 – 55, Kids 4 – 16)
- Older couples / singles no children (Parents 45+, childless or kids are older and not travelling with them)



CONSUMER TRENDS 2020

Consumer behaviour is evolving as a result of COVID-19 outbreak and social distancing guidelines. Consumers will want;

- To be put at ease and want to know that proper safety measures are in place
- High standards of cleanliness and other preventative measures
- More experiential and activity packed holidays
- Last minute bookings for local trips near home
- Shopping destinations, itineraries and lists of restaurants for a local weekend getaway are the top three resources consumers look for when planning local trips

Unique selling points; to build visitation and spend in the City of Holdfast Bay, there needs to be a focus on those experiences of which have the competitive advantage and better tell the story around these experiences. Our experience themes represent the key unique selling propositions of the region and under-pin our tourism industry;

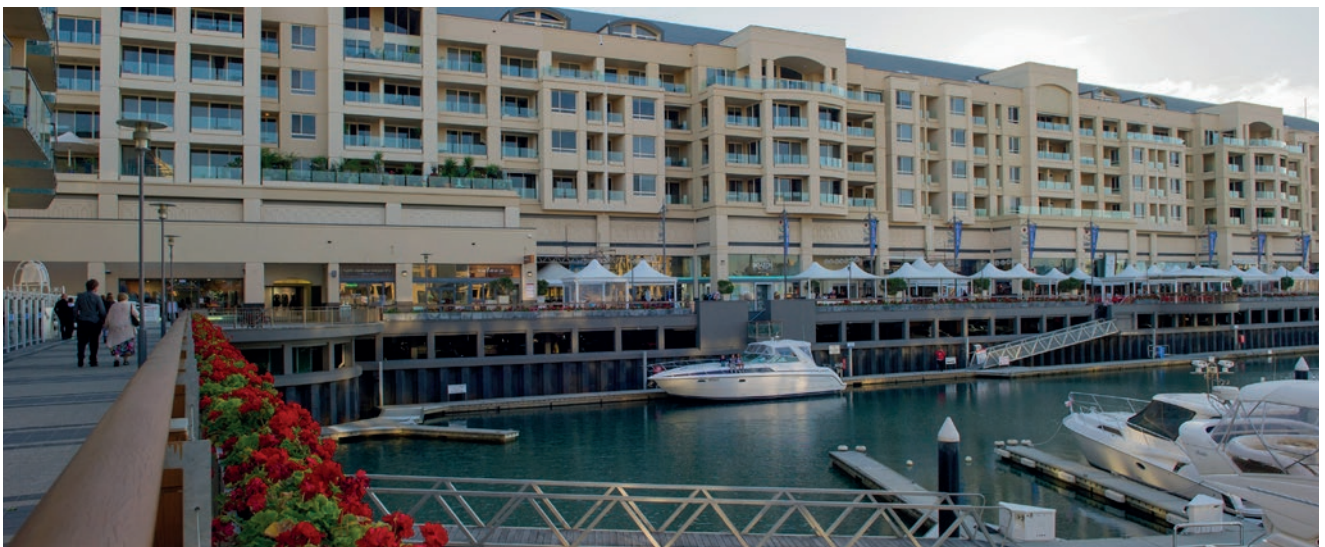
- Coastal – beaches, boating, swimming, jetties, coast path
- Nature + Landscapes – coastal walks, dolphin watching, sunsets
- Events + Sport – music, sporting, arts, food, wine, sailing clubs, surf clubs
- Soft Adventure – aquatic activities, fishing, segways, cycling
- Heritage + Cultural – galleries, museums, outdoor art, indigenous stories, history tours
- Food + Dining + Retail – mainstreets, marina pier, cafes, restaurants

INDUSTRY

The City of Holdfast Bay recognises the need for participation and partnerships in order to achieve the desired tourism outcomes. COVID-19 has increased the need for consultation and partnerships to rebuild our tourism sector. Council will look to;

- Support local tourism businesses by liaising with regional tourism organisations and state bodies on behalf of operators, and through collaborative projects
- Strengthen networks and connections across local government, precincts, businesses and associations to collaborate and to highlight key issues, developments and successes
- Work with industry to establish and monitor benchmarks for quality tourism development and service delivery to ensure consistency
- Drive sustainable business and product development
- Build and share best practice approaches, market research and information to improve overall efficiency

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 the City of Holdfast Bay and supporting tourism job growth.



OUR STRATEGIC PRIORITIES

The strategic priority areas and action plan from the Tourism Plan 2020 have been revised to focus on the immediate challenges and recovery from COVID-19. These strategies and actions are outlined below to drive the recovery of the tourism industry.



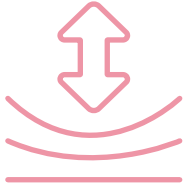
STRATEGIC PRIORITY 1 - DRIVING DEMAND

Increase the desirability of the City of Holdfast Bay as a travel destination. Showcase our strengths inspiring more people to visit, stay longer and spend more.



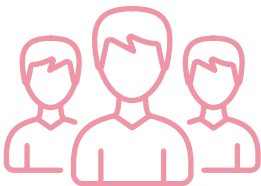
STRATEGIC PRIORITY 2 - DESTINATION DEVELOPMENT

Every visitor has a positive, memorable experience by developing accessible tourism products, experiences and visitor precincts.



STRATEGIC PRIORITY 3 - RESILIENCE AND SUSTAINABILITY

Ensuring the understanding of the contribution of the visitor economy and encourage the effective, integrated and consistent approach to management of our destination.



STRATEGIC PRIORITY 4 - CONSULTATION AND PARTNERSHIPS

Effectively collaborate with all levels of government and the cities stakeholders to grow tourism in the region.



TOURISM ACTION PLAN

STRATEGIC PRIORITY 1 – DRIVING DEMAND

REF	STRATEGY	ACTION
1.1	Promote the City of Holdfast Bay profile to our target markets	<p>Develop new campaign assets of the 'Stay' destination marketing campaign which encourages use of the City of Holdfast Bay's extensive accommodation and food and beverage infrastructure to encourage visitation by our target market segments.</p> <p>Expand Stay Local Advocacy campaign.</p>
1.2	Brand positioning / competitive advantage	<p>Improve awareness of the City of Holdfast Bay's key experiences in order to attract domestic market segments.</p> <p>Showcase the City of Holdfast Bay as a safe, clean destination with wide open spaces. Capitalise on beach / waterfront views.</p> <p>Repositioning brand in particular around shopping and dining experiences.</p> <p>Increase image content to the City of Holdfast Bay image gallery.</p>
1.3	Target market segments	<p>Action plans will be developed for each target market to ensure we are ready for the re-opening of interstate and international borders and to maximise day trip audience market share over other destinations.</p>
1.4	Securing investment through Council, grants, government funding and private investment for major infrastructure projects that enhance visitor experience and drive demand	<p>Current concepts requiring funding:</p> <ul style="list-style-type: none"> • Glenelg Jetty Regeneration Project • Glenelg Town Hall Redevelopment • Kingston Park Master Plan • Jetty Road Glenelg Master Plan • Regional Sports Hubs and Facilities • Wigley Reserve Site <p>Assist the strategic planning team with tourism data for funding applications and master planning.</p>
1.5	Support product development	<p>Encourage innovative and sustainable development of established and new tours and experiences that showcase the City of Holdfast Bay and facilitate engagement with the destination's unique nature, wildlife, heritage, culture, wellness and coast.</p> <p>Develop unique signature experiences – seafood, indigenous, aquatic.</p>
1.6	Build brand advocates	<p>Monitor and interact with our customer advocates on social media encouraging word of mouth referrals.</p> <p>Coordinate digital communications plan to support marketing activation.</p>

STRATEGIC PRIORITY 2 – DESTINATION DEVELOPMENT

REF	STRATEGY	ACTION
2.1	Elevate visitor needs and expectations	<p>Develop Glenelg visitor information offering;</p> <p>Implement annual surveys of visitors to the Visitor Information Outlet (VIO).</p> <p>Deliver regular volunteer training.</p> <p>Encourage dispersal of visitors from Glenelg to other suburbs of the City of Holdfast Bay to extend length of stay.</p>
2.2	Create a strong visitor appeal	<p>Facilitate precinct development, which complements the specific characteristics of each area to attract new business opportunities and visitors.</p> <p>Encourage visitation to the various art galleries, historical sites and public art in the area.</p> <p>Highlight the range of natural experiences on offer.</p> <p>Activate open spaces and laneways.</p>
2.3	Encourage events that offer the best opportunity for economic growth and add value to residents wellbeing and the local business community	<p>Recalibrating the scale of events to ensure our event operators and industry can grow new events which fit within the COVID-19 operating protocols, which might include initiatives as offering a series of smaller component functions but for the same overall event.</p> <p>Work with tourism partners to drive additional expenditure before and after events through product and packaging development.</p>
2.4	Facilitate continual improvement across Council services, events and activities	Undertake qualitative and quantitative market research of residents and visitors to establish satisfaction, needs, expectations and opportunities.
2.5	Enable a simplified Council application process for prospective tourism initiatives	Create a Tourism Recovery Project Panel comprising of EM's and SLT representation to support tourism proposals for endorsement to Council.
2.6	Develop a familiarisation program	Showcase the City of Holdfast Bay visitor economy businesses and experiences through key influencers and stakeholders.



STAY
AND PLAY

STRATEGIC PRIORITY 3 – RESILIENCE AND SUSTAINABILITY

REF	STRATEGY	ACTION
3.1	Increase recognition of the value of tourism	Coordinate communication plan to raise awareness of the benefits and value of tourism within the community to encourage local advocacy.
3.2	Internal stakeholder engagement	Tourism is considered and integrated across all departments on key projects and activities.
3.3	Environmental sustainability	Manage the impact on the local community and environment of tourism activity. Encourage visitor economy businesses to have sustainable environmental practices.
3.4	Empower residents and the local business community to be ambassadors for visitors in their area	Educate and inform residents about the value of tourism and the experiences on offer thereby actively driving the 'visiting friends and relatives' market.
3.5	Product diversification	Foster development into authentic, new and existing products and experiences to cater to our new environment and target markets. Promote good news stories from local businesses who are adapting/ diversifying to provide inspiration for other businesses.
3.6	Encourage the effective, integrated and consistent approach to management of our destination	Update destination management plan to: Facilitate continual improvement (capacity building). Assess internal capabilities and external environments. Undertake a signage audit to ascertain what needs to be upgraded so it is more informative / way finding.



STRATEGIC PRIORITY 4 – CONSULTATION AND PARTNERSHIPS

REF	STRATEGY	ACTION
4.1	Cross Council collaboration with Western Adelaide Alliance and Southern Adelaide Councils	<p>Market Adelaide Beaches with Western Adelaide Tourism Alliance (Port Adelaide Enfield, West Torrens and Charles Sturt Council).</p> <p>Establish a working group with Southern Adelaide Councils (Onkaparinga and Marion Councils).</p> <p>Host networking functions when safe to do so.</p> <p>Work with Adelaide City Council on the Adelaide Visitor Guide.</p>
4.2	Maximize membership with the Tourism Industry Council SA (TiCSA)	<p>Support the development of metro local government network on key projects to highlight metropolitan Adelaide and business advocacy programs.</p> <p>Encourage tourism operators to work with TiCSA for tourism accreditation, COVID Clean certification, awards, training and business development.</p>
4.3	Maintain key relationships within the South Australian Tourism Commission (SATC)	<p>Contribute to the regional marketing managers network group.</p> <p>Grow support for development of new experiences, infrastructure and investment projects.</p> <p>Provide regular communication with destination development, events and marketing teams to keep the City of Holdfast Bay front of mind.</p>
4.4	Maximize membership with Adelaide Convention Bureau (ACB)	Work with Adelaide Convention Bureau on conference bids, incentive group visits and in destination delegate's pre and post touring.
4.5	Precinct development - coordinate between Council, traders, landlords, tourism providers and the community	Work with JPMC, JLL Marina Pier precinct managers and Jetty Rd Brighton traders to attract new business to the City of Holdfast Bay, host events and promote the area.
4.6	Collaborate with key organisations and trade partners to grow tourism in the City of Holdfast Bay	Coordinate with organisations and trade partners to develop campaigns, events and activities.





TOURISM RECOVERY RESOURCES

The City of Holdfast Bay Council has a number of staff allocated across departments who deliver ongoing business development and marketing activity. Key actions such as investment attraction, event development, precinct master planning and funding can utilise existing resources.

Additional resources will be required to deliver specialist projects and consultants may be required to further assess opportunities and aid in the COVID-19 recovery.

The marketing budget is limited and requires the support of external revenue and partner marketing opportunities to gain effective reach into target markets.

Pivotal to the City of Holdfast Bay Council building sustainable tourism growth within the local economy is a partnership approach between all business units within the Holdfast Bay Council, other Government departments, neighbouring Councils, non for profit organisations, community centres, sporting groups and private sector businesses.

The City Activation team will provide a leadership role with the implementation of the destination strategic priorities.



MONITORING AND REVIEW

To ensure the currency and continued relevance of the Tourism Recovery Plan, an annual review of its 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 and actions outlined in the plan
- A review of visitor numbers and expenditure
- 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
- Estimated ROI for Council - for every dollar invested by Council on tourism, marketing and events what is returned to the local economy

Council will be briefed with a written report annually on the progress of the Tourism Action Plan, following the review process.

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City of Holdfast Bay, **Our Place Strategic Plan 2030**

City of Holdfast Bay, **Economic Activation Plan 2018 – 2023**

City of Holdfast Bay, **Open Space and Public Realm Strategy 2019-2030**

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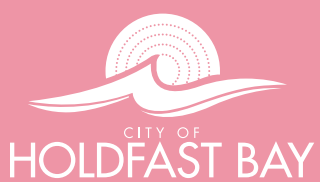
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