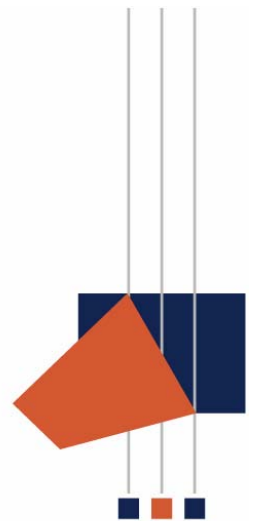


Business Plan

On Fossil & Geological Heritage Tourism in South Australia

November 2003

Prepared by



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Acknowledgements

The following people enthusiastically gave their time and energy to this project through face to face interviews during the consultancy period. Their contribution is very much appreciated. Ken Anderson, District Ranger, Northern Flinders Outback Region, Flinders Ranges National Park; Dr David Blight, Executive Director, Minerals and Energy Resources, Department of Primary Industries and Resources; Steven Bourne, Manager, Naracoorte Caves National Park; David Clayton, Recreation Planner, Limestone Coast Tourism; Helen Cook, Aboriginal Heritage, Department for Aboriginal Affairs and Reconciliation; Phil Czerwinski, Aboriginal Culture, Department of Aboriginal Affairs and Reconciliation; Penny Fairweather, Executive Officer, Limestone Coast Tourism; Dr Jim Gehling, Research Scientist, Palaeontology, SA Museum; Jeanette Gellard, Commercial Operations Manager, Kangaroo Island Regional Conservation; Dr Jane James, Associate Professor in Cultural Tourism, Flinders University; Sue Mikkelsen, Sponsorship and Business Development, SA Museum; Lisa Pearson, Tourism Marketing Manager, Flinders Ranges and Outback; Claire Savage, Manager, Visitor Management Services, Department for Environment and Heritage; Jeremy Robertson, School of Biological Sciences, Flinders University; Liz Reed, Palaeontologist, Naracoorte Caves National Park; Dr Rod Wells, Associate Professor, School of Biological Sciences, Flinders University; Jonathon Woods, Site Manager, Kelly Hill Conservation Park; Dan Grieve, Acting Site Manager, Flinders Chase National Park.

1.0 Executive Summary

South Australia has a unique range of Fossil and Geological Heritage sites and experiences. The Ediacaran deposits in the Flinders Ranges are among the oldest fossils yet found, and the ice age Megafauna fossil sites at the Naracoorte Caves National Park are among the largest and best preserved sites of this type in the world. In addition, both the Naracoorte Caves site and the Black Swamp site at the Flinders Chase National Park have active and current excavation digs in progress which provides first hand experiences to visitors to these locations.

When measured against similar fossil experiences available at both national and international locations, South Australia compares well. In regional South Australia, both the Naracoorte Caves National Park and the Flinders Chase National Park have tourism product that caters for all segments of the market and attract significant visitor numbers. There are well-established links between the South Australian Museum, Flinders University and these sites that have led to the development of several jointly developed programs that have increased public awareness of the experiences and have led to the development of product that enhances the visitor experience.

These factors are complemented by South Australia's overall competitive advantage based on its lifestyle, its relative 'under-development', the ease with which nature-based experiences can be had, and the opportunities to link these experiences with other appealing attributes

The Feasibility Study for this project established that the overall market demand for Fossil and Geological Heritage Tourism *as a discrete concept* is specific and niche oriented. It demonstrated that there are three broad market segments to which the experience has appeal; the general public, niche and education segments. For the general public segment, interacting with the fossil and geological experience may be incidental to their main motivation for travel but opportunities can be capitalised upon by linking with other products and utilising existing mainstream means of promotion. For the education and niche segments, the experience may be their prime motivation.

Whilst the commercial imperatives in the feasibility study demand a cautious approach to infrastructure development, the business plan provides a way forward or a 'roadmap' for development of the sector with this limitation in mind. Consequently, the business plan

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considers this cautious approach but also recognises that it is critical that the overall strategic direction of Fossil and Geological Heritage Tourism combines the imperatives of economic, social and environmental sustainability with a realistic assessment of both the current and potential market demand for this experience.

The following Vision Statement was developed by the consultants after discussions with key stakeholders involved in Fossil and Geological Heritage Tourism. Whilst this would need to be further developed by the stakeholder group, it is indicative of the type of approach that needs to be adopted by.

"To provide an authentic tourism experience capitalising on the unique age and diversity of Fossil and Geological Heritage assets that can exploit the developing domestic drive market through linking with other key tourism experiences and themes."

The goals and strategies formulated for this business plan have been aligned with the South Australian Tourism Plan 2003 – 2008. In particular, the Plan's objectives of enhancing and growing the State's authentic experiences, being productive in marketing the State achieving strategic alignment in policy, investment and development, and developing a strong, professional and profitable industry. Strategies to develop Fossil and Geological Heritage Tourism link with this plan, capitalising on expanding the appeal to the general public market segment whilst trying to develop newer, niche markets. It is the successful implementation of these strategies through the initiatives developed in the business plan that will optimise the likelihood of capitalising on opportunities to grow the Fossil and Geological Heritage based tourism in South Australia.

2.0 The Concept

2.1 What it is

Fossil and Geological Heritage Tourism can be described as a 'special interest' experience that is a sub-set of the broader based concept of Nature-Based tourism.¹ As a discrete experience it has particular attraction to the education sector (primary, secondary and tertiary) and to ecotourists. It has strong linkages to the outback, national parks, bushwalking and other similar natural environment activities. It also provides attractions and experiences for the general public market segment as evidenced by the attractions, and consequent visitor numbers, at the Naracoorte Caves National Park, the SA Museum and the Flinders Chase National Park.

2.2 Unique features

South Australia is uniquely positioned to present a range of experiences that appeal to the main market segments outlined in the Feasibility Study. Of particular relevance is the Naracoorte Caves National Park's listing as a World Heritage Area. This location has a diverse range of Pleistocene mammal fossils contained within a number of limestone caves. Research is currently in progress at this location and the National Park has well established tourism product catering for all market segments.

The Ediacaran fossil deposits found within the Flinders Ranges and are regarded as among the oldest fossils yet discovered. The Flinders Ranges is also an ancient landscape with significant geological features of international significance, and along with the Outback is one of South Australia's prime tourist destinations.

Kangaroo Island also has a currently operational Pleistocene mammal excavation site at Black Swamp located within the Flinders Chase National Park. The Island itself is also an international tourist destination in its own right.

These are among the unique features of the Fossil and Geological Heritage experience in South Australia as identified in the Feasibility Study.

¹ See South Australian Tourism Plan 2003 – 2008.

3.0 Market Analysis

The market analysis undertaken in the Feasibility Study demonstrates that while the market demand for the Fossil and Geological Heritage Tourism experience is currently niche oriented, it also has considerable appeal for the general public.

3.1 Market Size and Characteristics

Only a small proportion of all visitors to South Australia are likely to be *specifically* interested in Fossil and Geological Heritage attractions, as visitation to these fossil sites also incorporates a range of product offerings that have broader market appeal. Research suggests that visitors do not readily associate South Australia with having natural and environmental experiences. South Australia is ranked very low against other States and Territories in terms of its association with nature, coastal, or adventure experiences.² Therefore, critical to the development of this sector of the market are the linkages that can be developed through a range of experiences that can 'dovetail' with one another.

3.2 Market Segments

Three broad market segments have been identified through this study for whom Fossil and Geological Heritage Tourism has appeal. They are the general public, niche and education market segments.

There are experiences and interpretation for the general public featured in existing interpretive centres, guided tours, self-discovery trails and exhibitions; and there are niche market opportunities for providing specialised products such as participatory ecotourism and premium tours.

The general public component represents those people who would visit a fossil site as a part of an overall experience. It does not have to be their prime motivation. The education and niche segments on the other hand would have the fossil experience as their prime motivation. As the table 3.2.1 demonstrates, at a combined 12 percent, the niche and education market segments are relatively small.

² SATC Tourism Monitor, 2002

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Table 3.2.1 Comparative Size of Key Market Segments³

Segment	Proportion
General public	88%
Niche	7%
Education	5%

3.3 Trends

Throughout 2002 and the first quarter of 2003 there was a general decline in international travel. This was due to the events of 11 September 2001, the war in Iraq, the Bali bombing, the collapse of Ansett Airlines, SARS, and on going international security issues. During the same period, and due to the above mentioned issues, Australians were staying closer to home and taking more domestic holidays.⁴

Despite these factors, the Tourism Forecasting Council predicts an annual average growth rate of 4.6% per year in international visitors, and an annual average rate of 0.5% in domestic visitor nights in the period to 2012.⁵

A key trend is the focus on destination marketing by the South Australian Tourism Commission to attract the drive market. This is working extensively on domestic marketing to Australians to increase visitation by intrastate and interstate visitors. The South Australian Tourism Plan 2003 – 2008 identifies the drive market from Melbourne, Sydney, country Victoria and New South Wales and south-east Queensland as South Australia’s most profitable prospects.⁶ Forty four per cent of South Australia’s visitor nights came from this market.

3.4 Comparative Analysis

Internationally, Fossil and Geological Heritage localities have been successful tourist destinations for several decades, with many sites offering ongoing interpretive, participatory tourism and educational programs. Sites in the United States managed by the National Parks Service are in relatively close proximity to large domestic markets. In addition to fossils, these sites contain attractions rich in natural and cultural heritage values, including Native American and natural environment attractions. The programs and facilities at these sites are comparable to those in

³ The relative size of these market segments has been determined by an analysis of the size of the ecotourism market in South Australia and by the number of students using the SA Museum education programs.

⁴ SA Tourism Index 2003

⁵ **Forecast**, Tourism Forecasting Council, May 2003

⁶ **South Australian Tourism Plan 2003-2008**, SATC 2002

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South Australia's National Parks, and feature displays, interpretation and tours. Visitor numbers to the sites vary, and are dependent on the accessibility of the park and attractions. Making overall comparisons between the performance of these sites between Australia and the U.S. is difficult given the variables. However, it can be reasonably concluded that given the population disparities, Australian sites are performing as well as, if not better, than U.S. sites on visitor numbers.

In Australia, the level of development of fossil sites varies. Most sites, and their interpretive centres, have only been in operation for the past ten years or less. The level of visitation to these sites varies according to their location, accessibility and proximity to markets.

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4.0 SWOT Analysis

The following SWOT analysis is a summary of the perceived strengths, weaknesses, opportunities and threats facing Fossil and Geological Heritage Tourism across South Australia. This analysis was formulated by the consultants and based upon interviews with key stakeholders and a review of the existing literature. It is important to clearly identify these elements as they formulate the platform for the development of strategies and the implementation plan. These strategies are designed to overcome the perceived weaknesses and threats and capitalise upon the perceived strengths and opportunities.

4.1 Strengths

Strengths (which can be capitalised upon)	This means that....
<ul style="list-style-type: none"> ▪ Unique fossil and geological experiences (Flinders Ranges, Naracoorte Caves) ▪ Easy access to most significant sites (SA Museum, Naracoorte Caves) ▪ Destinations of international repute (Kangaroo Island, Flinders Ranges, Naracoorte Caves) ▪ Able to link with complementary experiences (Aboriginal Culture, Wine and Food, Trails) ▪ Developed tourism product (Wonambi Fossil Centre) ▪ SA has world class natural attributes: <ul style="list-style-type: none"> · Kangaroo Island with its abundant flora and fauna in its natural habitat · Naracoorte Caves, World Heritage Site - fossil site of exceptional importance · Flinders Ranges, a spectacular and ancient arid zones landscape ▪ Accessibility within SA (easy to get around) 	<ul style="list-style-type: none"> ▪ Visitors engage in activities unavailable elsewhere ▪ Sites accessible to all markets ▪ Visitors are drawn by strong attractions ▪ Multiple experiences can draw people from broader base ▪ Identifiable attractions can promote the experience ▪ "Iconic" attractions can draw international visitors ▪ The experience has appeal for the self-drive market

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4.2 Weaknesses

Weaknesses (that need to be addressed)	This means that....
<ul style="list-style-type: none"> ▪ Poor fossil protection ▪ Poor interpretation at some sites ▪ Remoteness of some sites ▪ Fragility of sites ▪ Lack of financial resources ▪ Product life cycle of interpretation ▪ Poor international air links ▪ Fragmentation of the tourism industry ▪ Poor industry standards ▪ Poor industry profitability ▪ Lack of risk management systems ▪ Inadequate infrastructure (some areas) ▪ Lack of monitoring methodologies ▪ Conventional tourism thinking dominates new investment ▪ Few nature-based sector champions ▪ Lack of nature-based sector capacity (industry network body) ▪ Lack of breadth and depth of product 	<ul style="list-style-type: none"> ▪ Risk of damage to fossil assets ▪ Lack of engagement with markets ▪ Reduces visitation ▪ Risk of damage to assets ▪ Restricts expenditure ▪ Poor provision of quality tourism experiences ▪ Reduces visitation from international markets ▪ Poor cohesion, lack of consistent experiences ▪ Lack of consistent tourism experiences ▪ Reduces industry sustainability & consistency ▪ Increases risk with public liability through tourism experiences ▪ Compromises the visitor experience ▪ Reduces industry sustainability ▪ Investment funds are scarce ▪ Development is fragmented ▪ Compromises visitor experience ▪ Visitor experience compromised

4.3 Opportunities

Opportunities (available in the market place)	This means that....
<ul style="list-style-type: none"> ▪ Link complementary experiences, (Aboriginal cultural heritage, trails) ▪ The increasing drive market ▪ Differentiate SA in delivering unique experiences ▪ Highlight Adelaide as the 'hub' for city based driving to regions ▪ Strong tourism-national parks partnership ▪ High yield / low impact niche market development 	<ul style="list-style-type: none"> ▪ Provide a greater range of opportunities to attract a greater number of visitors ▪ Attract greater numbers of visitors ▪ Provides national and international 'hook' to attract greater number of visitors ▪ All locations easily accessible for drive market ▪ Development is driven by sustainability ▪ Enhancement of sustainability principles

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4.4 Threats

Threats (from the marketplace that can effect the business)	This means that....
<ul style="list-style-type: none"> ▪ Other local and interstate general attractions and experiences ▪ Other interstate fossil and geological experiences ▪ Public liability risks ▪ Easy to market product that is not ready ▪ Inadequate infrastructure ▪ The home lifestyle industry 	<ul style="list-style-type: none"> ▪ Numbers of visitors drawn away from SA ▪ International visitor drawn to competitor sites ▪ Increased external risk ▪ Sustainability principles are compromised ▪ Visitor experience is compromised ▪ Visitor numbers are reduced

4.5 Competitive Advantage

South Australia’s long term competitive advantage in tourism will be based on achieving genuine sustainable development measured against triple bottom line outcomes (i.e., economic viability, social responsibility and environmental sensitivity).

A key South Australian competitive advantage is its enviable lifestyle, its relative ‘under-development’, the ease with which nature-based experiences can be had, and the opportunities to link these experiences with other appealing attributes.⁷

There are several other factors specific to South Australia that contributes to the state’s competitive advantage. These include the natural environment - including internationally recognised Nature-Based tourism destinations (Kangaroo Island, Flinders Ranges); the World Heritage Site status of the Naracoorte Caves National Park; the close proximity and accessibility of key sites to markets; the unique fossil assets (both in age and diversity); and the complementary tourism experiences.

Adelaide serves as a central hub to the key locations, and the SA Museum - with the Origin Energy Fossil Gallery - provides both a gateway to the regional locations and the interpretation to the sites and the significance and context of the fossils deposits themselves.

⁷ Responsible Nature-Based Tourism Strategy 2003 -2008, SATC

5.0 Strategic Direction

The overall strategic direction for Fossil and Geological Tourism should combine the imperatives of economic, social and environmental sustainability with a realistic assessment of both the current and potential market demand for this experience.

5.1 Target Markets

From the market analysis undertaken for the Feasibility Study it can be seen that the primary market segments with a *specific* interest in this experience are the niche and education segments. This is not to suggest that the general public does not have an interest, but that their interest is secondary and subservient to a broader, complementary set of experiences encompassing a range of activities. These broader interests – for example, Wine and Food, Festivals and Events, etc – can be thematically linked with the Fossil and Geological Heritage experience and leveraged to increase levels of visitation across all sectors and should be adopted.

Whilst there is international interest in the products that are and can be developed for Fossil and Geological Heritage Tourism, the primary market needs to be clearly recognised as the domestic market. South Australia is not a highly visited international destination compared to the eastern states. Therefore, capitalising upon the existing markets that generate most profits is the most efficient way to develop the segment in a sustainable manner. The increasing drive market is a result of the extensive drive campaign developed by the South Australian Tourism Commission and provides an opportunity to capitalise upon the key interstate and intrastate domestic markets.

An element in the approach to understanding the target markets is the use of BDA[©] Travel behaviour typologies⁸. This method adequately describes travel behaviour patterns and allows marketers to identify ways to promote to them. It is with this understanding that broader tourism goals are developed and influence smaller strategies and objectives. This business plan uses this understanding in the development of specific strategies to develop the sector.

⁸ Refer to Appendix E in the Feasibility study for an overview of these typologies.

5.2 Positioning

Given the market demand, the market segments most likely to be attracted to the experience, and the nature of the experience itself, Fossil and Geological Heritage Tourism requires a positioning focus that attracts those people with a strong interest in the natural sciences, Nature-Based experiences, and such themes as the evolution of life on the planet. Accordingly, the appeal of the experience should relate to the broad environmental, social and heritage interests of the target markets.

In addition, the South Australian Tourism Plan 2003 - 2008 presents a case for positioning South Australia as a speciality destination based on and the unspoilt character of nature and outback experiences. Complementary to these themes are additional experiences that can be closely linked to Fossil and Geological Heritage Tourism including, Aboriginal cultural experiences, heritage, history and culture, adventure, ecotourism, and food and wine.

Accurate and effective branding and positioning will be realised by capitalising on the unique attributes of the sites and the unique product offerings that can be developed for the market.

5.3 Vision

South Australia's tourism vision is to be an inspirational leader in innovative and sustainable tourism (South Australian Tourism Plan 2003-2008 – Inspiring partnerships for sustainable tourism). In line with this, the following Vision Statement is relevant to the Fossil and Geological Heritage Tourism experience. This was developed by the consultants following discussions with key stakeholders involved in Fossil and Geological Heritage Tourism. Whilst this would need to be developed by the stakeholder group, it is indicative of the type of approach that needs to be adopted.

"To provide an authentic tourism experience capitalising on the unique age and diversity of Fossil and Geological Heritage assets that can exploit the developing domestic drive market through linking with other key tourism experiences and themes."

5.4 Critical Success Factors

There are a number of 'critical success factors' that need to be identified and addressed for the successful development and implementation of the business plan.

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Significantly these are linked strongly to the 'triple bottom line' imperatives identified by the South Australian Tourism Commission. Specifically, these include meeting the balance between the economic objectives of growth, shareholder value, efficiency and innovation combined with the social objectives of empowerment and equity, social mobility, social cohesion, cultural identity and institutional development in line with the environmental objectives of ecosystem integrity, climate integrity, carrying capacity and biodiversity.

In other words, a balance between the critical elements of the marketing and destination development mix is required to achieve successful and sustainable tourism outcomes. Achievement of the triple bottom line in relation to sustainability is a priority for sustainable growth. The successful blend of these elements will provide the foundation for sustainable tourism development incorporating this sector.

Significantly, Government and other agencies can provide support and facilitate development of product, market development and arrange for infrastructure creation in support, but ultimately, the major risk for sustainable tourism product is undertaken by the tour operators themselves.

It is therefore critical that industry support any initiatives undertaken in the development of each of these sectors. Previously, commercial imperatives have not been realised in the development of products or in marketing initiatives. Many reasons can be attributed to this however, the results of such activities can be seen in the lack of consistent product, the lack of internationally ready product and the high turnover of operators entering and leaving the tourism industry.

The adoption of a strategic approach for growing the sector in a sustainable manner combined with engendering operator support and increasing market awareness will provide a major impetus in striking a balance between demand by markets and the supply of marketable product by operators.

Through the adoption of this approach, sustainable growth for the tourism industry can be achieved.

6.0 Objectives and Strategies

A major issue highlighted in the examination of the market demand is ownership. The Fossil and Geological physical assets themselves are on a mixture of private and government land, leading to a mixed approach regarding asset control and the development of management strategies. These issues need to be addressed for a way forward to be developed.

Further, the development of the market segments needs to be adopted by a champion or group of champions as we have seen by the energies of the current stakeholder group. However, as previously identified, development and the commercial risks associated with such activity will fall largely to the commercial tour operators in the production of a range of products that can be actively promoted in the market place.

Partnerships must be struck for this to occur. It is recognised though that for most commercial operators to be involved in developing the sector, commercial imperatives will need to be achieved or support will wane very quickly. The development of strategies to engender support can only be undertaken with the understanding that there is significant market demand that can sustain the commercial priorities of such businesses.

The role of government within this process is to facilitate growth through the linking and coordination of partnerships that will provide jobs and wealth creation. The process of acquisition and provision of commercial enterprises within major sites provides inherent problems with the commercial investment of infrastructure and the ongoing support required to maintain it.

Government can facilitate the involvement of others through strategies and the current provision of assets and sites. However, the benefit of this is negligible when the overall development of product placed in the marketplace and risks associated with it is borne by tourism operators.

Consumer behaviour identified through BDA typologies indicates that there is an interest in nature based activities as a component of the primary markets travelling to South Australia. Strategies have been developed to capitalise upon these opportunities.

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A key state tourism plan goal is to undertake destination development. Realistically this relates to enhancing regional experiences through value additions and the development of products to meet specific market demands to what are defined as our 'most profitable prospects' (MPP's). This approach generates activities activity through specifically targeting those elements that the product suits and will provide the best return for capital investment.

A focus also is placed upon ensuring that yield can be achieved and maintained by tourism operations. This will ensure that the key imperative of commercial viability and sustainable practice can be met.

The positioning as related to in the tourism plan is to make South Australia the domestic market's first choice for memorable wine and food, special event, nature-based, Outback and coastal and marine experiences – particularly for through self drive touring holidays.

The key philosophy of this approach is to ensure that South Australia is different from competitors. A major emphasis is on the provision of authentic experiences as opposed to contrived or artificial experiences. From a product development perspective, this relates very strongly to providing links and clusters of authentic experiences with existing products already in the market place. Through the development of capitalising on both linear and hub and spoke product linkages, Fossil and geological Heritage Tourism can be integrated into the general, niche and education market segments.

Specifically, development of the sector considers the opportunities presented by linking products that appeal to the more general market as well as product development initiatives that will specifically appeal to the niche and education markets. These opportunities were identified in the feasibility study and are prioritised in the business plan.

As highlighted in the state tourism plan, for South Australia to position itself as an inspiring leader in sustainable tourism, "initiatives in tourism sustainability and triple bottom line thinking must apply innovative approaches locally."

This plan strives to achieve a balance between stakeholders and the commercial realities of the tourism industry whilst creating a way forward to progress the marketing a sustainable manner.

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The creation of a facilitator/coordinator position must be seen as a short-term action to facilitate industry involvement and create a sustainable path of development for Fossil and Geological Heritage Tourism. Due to the unique skill set required for the job, two part time jobs may be required to ensure that the best suited applicants are secured to develop the market.

The following objectives and strategies flow from the challenges and issues identified in the Feasibility Study, and from the SWOT and Market Analysis developed in Sections 4.0 and 5.0 of this plan. They are aligned with the South Australian Tourism Plan's goals of enhancing and growing the State's authentic experiences; being productive in marketing the State; achieving strategic alignment in policy, investment and development; and developing a strong, professional and profitable industry.

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Goal: Enhance and Grow the State's Authentic Experiences⁹

Objectives	Strategies	Responsible Agency ¹⁰	Budget	Timing	KPI
1.1 Expand existing tourism precincts to offer sustainable products for F&GHT	1.1.1 Convene forum for all stakeholders (operators and stakeholders) to identify potential product development opportunities (marketable product) and sustainability imperatives	Coordinator	Coord's resources	July '04	• Forum held
	1.1.2 Develop and implement a special 'register' arrangement between selected sites and tour operators	Coordinator	Coord's resources	August '04	• Number of operators with 'licence'
	1.1.3 Develop 'soft' interpretation products linking tour operators and palaeontologists to promote sector	Coordinator	Coord's resources	September '04	• Interpretation developed and distributed
1.2 Link with existing product themes currently recognised as major competitive strengths of South Australia	1.2.1 Develop educational products in collaboration with Education Department Outreach Program	DEH/SAM Education Dept	Agency's resources	January '05 & Ongoing	• Products included in the curriculum
	1.2.2 Assess product life cycle of the tourism product at Naracoorte National Park and begin implementation strategy	DEH	\$50,000	December '04	• Analysis completed
1.3 Increase level of collaboration	1.3.1 Coordinate unique product offerings to complement visitor experiences in each of the regions	Coordinator DEH/SATC SAM	Coord's resources	July '04 & Ongoing	• Product development framework implemented

⁹ South Australian Tourism Plan 2003-2008, Goal 1

¹⁰ SATC = South Australian Tourism Commission; CIBM = Centre for Innovation, Business and manufacturing; RDB = Regional Development Board; DEH = Department for Environment and Heritage; ACCR = National Tourism Accreditation Program; SAM = South Australian Museum; FU = Flinders university; TAFE = Technical and Further Education.

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among all sites in developing complementary products	1.3.2 Develop events and travelling exhibitions to showcase assets to regional communities	Coordinator DEH/SATC SAM/RDB	Coord's resources	July '04 & Ongoing	• Numbers to exhibitions
1.4 Ensure accurate interpretation to the marketplace occurs promoting unique assets	1.4.1 Train operators, guides and volunteers in aspects of Fossil and Geological Tourism to provide accurate interpretation and presentation	DEH/SAM FU/TAFE	Agency's resources	Ongoing	• Number of operators and volunteer guides trained

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Goal: Be Productive in Marketing the State¹¹

Objectives	Strategies	Responsible Agency	Budget	Timing	KPI
2.1 Develop public awareness of the of SA's Fossil and Geological assets	2.1.1 Prepare a location map of key public access fossil and geological sites with existing trails	Coordinator	\$15,000	September '04	• Map produced
	2.1.2 Prepare written material for inclusion in regional 'Secrets' brochures	Coordinator SATC	Agency's resources	September '04	• Material included in 'Secrets' brochures
	2.1.3 Develop special events at the Museum that promote public awareness	SAM	Agency's resources	Ongoing	• Number of events developed
	2.1.4 Promote the World Heritage listing of Naracoorte caves National Park through existing means	DEH/SATC	Agency's resources	Ongoing	• Recognition as a World Heritage area by consumers
	2.1.5 Promote Fossil and Geological Heritage Tourism sites as a component of the Nature Based tourism product within South Australia	SATC	Agency's resources	Ongoing	• Consumer recognition as a component of Nature Based tourism
	2.1.6 Ensure website links are provided from key tourism sites to highlight the Fossil & Geological Heritage Tourism market	Coordinator	Coord's resources	December '04	• Number of website links
	2.1.7 Examine the possibility of a 'marketable' brand name that will appeal to the wider general public	Coordinator External Consultant	\$20,000	Ongoing	• Clear identification of a brand identify to match the Fossil & geological Heritage theme
	2.1.8 Link with 'ACTA' in to conduct bids for Palaentological conferences	Coordinator	Coord's resources	Ongoing	• Successful conference bids
	2.1.9 Undertake Community education on the meaning of World Heritage Areas	Coordinator	Coord's resources	Ongoing	• Community has enhanced understanding
2.2 Promote the uniqueness of sites in SA under the Geological	2.2.1 Promote the diversity Naracoorte Caves National Parks fossil assets	DEH/SATC	Agency's resources	Ongoing	• Consumer recognition of uniqueness
	2.2.2 Promote the ancient landscape and the oldest	DEH/SATC	Agency's	Ongoing	• Consumer recognition of uniqueness

¹¹ South Australian Tourism Plan 2003-2008, Goal 2

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Heritage and Fossil Tourism theme	fossil deposits of the Flinders Ranges		resources		
2.3 Link with existing promotional activities to capitalise on the synergies between products	2.3.1 Co-locate promotional material with complementary visitors guides	SATC	Agency's resources	Ongoing	• Location of promotional material
	2.3.2 Facilitate packaging Fossil and Geological Heritage Tourism products with tourism operators to provide access into the marketplace with Nature Based experiences	Coordinator	Coord's resources	December '04 & Ongoing	• Number of packaged products involving Fossil & Geological Heritage sites
	2.3.3 Facilitate cross marketing opportunities with product linkages such as food and wine etc. so that authentic products are created	Coordinator	Coord's resources	December '04 & Ongoing	• Number of packages offering product diversity
	2.3.4 Facilitate product development with existing 'trails' and 'drives' to value add current products through Fossil and Geological Heritage Tourism experiences	Coordinator	Coord's resources	December '04 & Ongoing	• Linkages with existing trails and drives
	2.3.4 Establish links with interstate sites to develop cooperative marketing efforts	Coordinator	Coord's resources	December '04 & Ongoing	• Links with interstate sites established
	2.3.5 Incorporate Fossil & Geology experiences into current SATC Branding and Positioning.	Coordinator	Coord's resources	Ongoing	• Fossil & Geology experiences include in SATC Branding and Positioning
2.4 Develop awareness of SA's Fossil & Geological Heritage sites to niche and education markets	2.4.1 Promote to appropriate geological and alumni associations through existing networks of Flinders University, South Australian Museum and other bodies	Coordinator	Coord's resources	July '05	• Promotions received by appropriate parties
	2.4.2 Promote to appropriate overseas markets through the facilitation of product development opportunities by ecotourism operators. Explore opportunities for exchange program with major UK fossil site to involve staff and/or students.	Coordinator	Coord's resources	March '05 & Ongoing	• Packaged product being sold at international level

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Goal: Achieve Strategic Tourism Policy, Investment and Development¹²

Objectives	Strategies	Responsible Agency	Budget	Timing	KPI
3.1 Develop infrastructure to enhance existing Fossil and Geological tourism sites	3.1.1 Prepare interpretation and displays for Ediacaran fossils at the SA Museum Wadlata Outback Centre, Cooper Pedy, Hawker & other regional interpretative centres.	Coordinator SAM/DEH	\$70,000	December '04	• Interpretation displays produced
	3.1.2 Provide improved interpretation to the general public, educational and niche market segments at Flinders Ranges National Park	Coordinator	\$100,000	July '05	• Improved infrastructure provided
	3.1.3 Identify Public Access Route areas on private land	Coordinator	Coord's resources	December '04	• Public Access Routes identified
	3.1.4 Develop a Pass for trail and drive experiences linking products within South Australia	Coordinator	Coord's resources	December '04	• Drive and trail Passes developed
3.2 Ensure protection of Geological and Heritage Tourism assets	3.2.1 Assist in the development of Management Plans for National Parks with Fossil and Geological deposits	DEH	Agency's resources	December '04	• Plans completed
	3.2.2 Facilitate government policy/legislation to protect Fossil and Geological assets	PIRSA/DEH	Coord's resources	Current & Ongoing	• Legislation adopted
	3.2.3 Conduct risk management plan for Flinders Ranges National Park	DEH	Agency's resources	December '04	• Risk management plan produced
	3.2.4 Train guides and volunteers in aspects of Fossil and Geological tourism to minimise site impacts. Link all sites with consistent information.	DEH	\$10,000	Current & Ongoing	• Number of guides and volunteers trained
	3.2.5 Develop and implement risk management plans at appropriate key sites	DEH/Site owners	\$20,000	December '05	• Risk management plans developed
	3.2.6 Link TOMM framework to key assets/sites to identify visitor and other stakeholder impacts	Coordinator SATC	\$15,000	July '04	• Framework adopted at key sites
3.3 Develop and strengthen key	3.3.1 Examine federal funding opportunities to support development of the sector. (Federal funding identified	SATC/DEH	Agency's	Ongoing	• Funding secured

¹² South Australian Tourism Plan 2003-2008, Goal 3

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partnerships among all agencies involved in improving the Fossil and Geological Tourism experience	as Going Places, Linkage and White Paper).		resources		
	3.3.2 Establish a coordinator to oversee implementation of consistent management, marketing and niche product development activities (2 years @ \$100,000 per year, including on costs)	SATC/DEH major stakeholders	\$200,000	July '04	• Position established and filled
	3.3.3 Stakeholders to continue to provide input into the continuous improvement of the overall plan by meeting quarterly	All	SAM & Flinders University	Ongoing	• Regular quarterly meetings held
	3.3.4 Develop and implement data gathering methodology to collect and analyse visitor feedback	Coordinator DEH/SAM	Coord's resources	August '04	• Methodology implemented
	3.3.5 Develop and maintain data base to gather and update intelligence on similar sites nationally and internationally	Coordinator DEH/SAM	Coord's resources	September '04	• Register developed
	3.3.6 Identify and engage all bodies with interests in Fossil and Geological Tourism (eg, RDBs, TMBs, Universities, Federal, State & Local Government)	Coordinator	Coord's resources	July '04	• Stakeholder list identified
	3.3.7 Encourage Regional Marketing Committees to promote the value of Fossil and Geological Heritage Tourism	Coordinator	Coord's resources	December '04	• Regional community involvement
	3.3.8 Develop strategies in collaboration with the Department of Aboriginal Affairs and Reconciliation to ensure cultural issues are acknowledged and respected	Coordinator	Coord's resources	December '04	• Strategies developed

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Goal: Develop a Strong Professional and Profitable Industry¹³

Objectives	Strategies	Responsible Agency	Budget	Timing	KPI
4.1 Develop new methods of cost recovery in addition to current fee structures	4.1.1 Improve performance of commercial cost centres at National Parks through the development of new pricing initiatives (eg, map sales, tours)	DEH	Existing resources	December '04	<ul style="list-style-type: none"> New pricing policy and structure implemented
4.2 Identify additional sources of revenue including corporate sponsorship, retail sales	4.2.1 Prepare a corporate sponsorship proposal identifying opportunities for commercial investment through sponsorship	Coordinator	Existing resources	December '04	<ul style="list-style-type: none"> Sponsorship proposal completed Sponsors identified
	4.2.2 Analyse and identify new methods of revenue generation through the production of retail sales opportunities	DEH	Existing resources	December '04	<ul style="list-style-type: none"> New revenues streams identified
	4.2.3 Implement new methods of revenue generation	DEH	Existing resources	Jul '05	<ul style="list-style-type: none"> New revenue streams implemented
4.3 Enhance the profitability of commercial operators within this sector	4.3.1 Provide educational opportunities to enhance tourism operator skills and expertise	SATC/CIBM RDB	Existing resources	Ongoing	<ul style="list-style-type: none"> Operators with higher skill levels
	4.3.2 Encourage tourism operators to be accredited under the National Ecotourism Accreditation Program & the National Tourism Accreditation Program	SATC ACCR/RDB	Existing resources	Ongoing	<ul style="list-style-type: none"> Increase in the amount of operators accredited

¹³ South Australian Tourism Plan 2003-2008, Goal 4

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7.0 Implementation Schedule

Importantly, action can be undertaken immediately to facilitate development and growth of this market segment. Many initiatives are currently underway that, with a minor refinement, can assist in positioning the state as a destination for Fossil and Geological Heritage Tourism. These opportunities can be realised through the immediate action of current and ongoing initiatives further developed below. Once further funding is secured, initiatives can then be further developed under each financial year scenario.

It is acknowledged by the consultants that at present there are no resources available within the agencies to implement these strategies, and that additional resources will be required for the 2004/2005 and 2005/2006 financial years. However, a number of strategies that can be integrated into existing programs and resources of the South Australian Tourism Commission have been highlighted in the following tables.

The table represents the actions for implementation in chronological order.

Date	Strategy	Agency ¹⁴	Budget
Current and Ongoing			
Ongoing	4.3.1 Provide educational opportunities to enhance tourism operator skills and expertise	SATC/CIBM RDB	Existing resources
Ongoing	3.3.1 Examine federal funding opportunities to support development of the sector (Federal funding identified as Going Places, Linkage and White Paper).	SATC/DEH	Existing resources
Ongoing	4.3.2 Encourage tourism operators to be accredited under the National Ecotourism Accreditation Program & the National Tourism Accreditation Program	SATC ACCR/RDB	Existing resources
Ongoing	1.4.1 Train operators, guides and volunteers in aspects of Fossil and Geological Tourism to provide accurate interpretation and presentation	DEH/SAM FU/TAFE	Agency's resources
Ongoing	2.1.3 Develop special events at the Museum that promote public awareness	SAM	Agency's resources
Ongoing	2.1.4 Promote the World Heritage listing of Naracoorte Caves National Park through existing means	DEH/SATC	Agency's resources
Ongoing	2.1.5 Promote Fossil and Geological Heritage Tourism sites as a component of the Nature Based tourism product within South Australia	SATC	Agency's resources
Ongoing	2.2.1 Promote the diversity of Naracoorte Caves National Park's fossil assets	DEH/SATC	Agency's resources

¹⁴ SATC = South Australian Tourism Commission; CIBM = Centre for Innovation, Business and manufacturing; RDB = Regional Development Board; DEH = Department for Environment and Heritage; ACCR = National Tourism Accreditation Program; SAM = South Australian Museum; FU = Flinders university; TAFE = Technical and Further Education;

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Ongoing	2.2.2 Promote the ancient landscape and the oldest fossil deposits of the Flinders Ranges	DEH/SATC	Agency's resources
Ongoing	2.3.1 Co-locate promotional material with complementary visitors guides	SATC	Agency's resources
Ongoing	3.3.3 Stakeholders to continue to provide input into the continuous improvement of the overall plan by meeting quarterly	All	SAM & Flinders University
Ongoing	2.1.8. link with 'ACTA' in to conduct bids for Palaentological conferences	Coordinator	Coord's resources
Ongoing	2.1.9 Undertake Community education on the meaning of World Heritage Areas	Coordinator	Coord's resources
Ongoing	2.3.5 Incorporate Fossil & Geology experiences into current SATC Branding and Positioning.	Coordinator	Coord's resources
Ongoing	2.1.7 Examine the possibility of a 'marketable' brand name that will appeal to the wider general public	Coordinator External Consultant	\$20,000
Ongoing	3.2.2 Facilitate government policy/legislation to protect Fossil and Geological assets	PIRSA/DEH	Coord's resources
Ongoing	3.2.4 Train guides and volunteers in aspects of Fossil and Geological tourism to minimise site impacts. Link all sites with consistent information.	DEH	\$10,000

2004/2005			
July '04	3.1.2 Provide improved interpretation to the general public, educational and niche market segments	Coordinator	\$100,000
July '04	3.3.2 Establish a coordinator to oversee implementation of consistent management, marketing and niche product development activities (2 years @ \$100,000 per year, including on costs)	SATC/DEH major stakeholders	\$100,000
July '04 & Ongoing	1.3.1 Coordinate unique product offerings to complement visitor experiences in each of the regions	Coordinator DEH/SATC SAM	Coord's resources
July '04 & Ongoing	1.3.2 Develop events and travelling exhibitions to showcase assets to regional communities	Coordinator DEH/SATC SAM/RDB	Coord's resources
July '04	3.3.6 Identify and engage all bodies with interests in Fossil and Geological Tourism (eg, RDBs, TMBs, Universities, Federal, State & Local Government)	Coordinator	Coord's resources
July '04	3.2.6 Link TOMM framework to key assets/sites to identify visitor and other stakeholder impacts	Coordinator SATC	\$15,000
July '04	1.1.1 Convene forum for all stakeholders (operators and stakeholders) to identify potential product development opportunities (marketable product) and sustainability imperatives	Coordinator	Coord's resources
August '04	1.1.2 Develop and implement a special 'register' arrangement between selected sites and tour operators	Coordinator	Coord's resources
August '04	3.3.4 Develop and implement data gathering methodology to collect and analyse visitor feedback	Coordinator DEH/SAM	Coord's resources

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September '04	1.1.3 Develop 'soft' interpretation products linking tour operators and palaeontologists to promote sector	Coordinator	Coord's resources
September '04	3.3.5 Develop and maintain data base to gather and update intelligence on similar sites nationally and internationally	Coordinator DEH/SAM	Coord's resources
September '04	2.1.1 Prepare a location map of key public access fossil and geological sites with existing trails	Coordinator	\$15,000
September '04	2.1.2 Prepare written material for inclusion in regional 'Secrets' brochures	Coordinator SATC	Agency's resources
December '04 & Ongoing	2.3.2 Facilitate packaging Fossil and Geological Heritage Tourism products with tourism operators to provide access into the marketplace with Nature Based experiences	Coordinator	Coord's resources
December '04 & Ongoing	2.3.3 Facilitate cross marketing opportunities with product linkages such as food and wine etc. so that authentic products are created	Coordinator	Coord's resources
December '04 & Ongoing	2.3.4 Facilitate product development with existing 'trails' and 'drives' to value add current products through Fossil and Geological Heritage Tourism experiences	Coordinator	Coord's resources
December '04 & Ongoing	2.3.4 Establish links with interstate sites to develop cooperative marketing efforts	Coordinator	Coord's resources
December '04	3.1.1 Prepare interpretation and displays for Ediacaran fossils at the SA Museum Wadlata Outback Centre, Cooper Pedy, Hawker & other regional interpretative centres.	Coordinator SAM/DEH	\$70,000
December '04	3.1.3 Identify Public Access Route areas on private land	Coordinator	Coord's resources
December '04	3.1.4 Develop a Pass for trail and drive experiences linking products within South Australia	Coordinator	Coord's resources
December '04	3.2.1 Assist in the development of Management Plans for National Parks with Fossil and Geological deposits	DEH	Agency's resources
December '04	3.2.3 Conduct risk management plan for Flinders Ranges National Park	DEH	Agency's resources
December '04	3.3.7 Encourage Regional Marketing Committees to promote the value of Fossil and Geological Heritage Tourism	Coordinator	Coord's resources
December '04	3.3.8 Develop strategies in collaboration with the Department of Aboriginal Affairs and Reconciliation to ensure cultural issues are acknowledged and respected	Coordinator	Coord's resources
December '04	1.2.2 Assess product life cycle of the tourism product at Naracoorte National Park and begin implementation strategy	DEH	\$50,000
December '04	2.1.6 Ensure website links are provided from key tourism sites to highlight the Fossil & Geological Heritage Tourism market	Coordinator	Coord's resources
December '04	4.1.1 Improve performance of commercial cost centres at National Parks through the development of new pricing initiatives (eg, map sales, tours)	DEH	Existing resources
December '04	4.2.1 Prepare a corporate sponsorship proposal identifying opportunities for commercial investment through sponsorship	Coordinator	Existing resources
December '04	4.2.2 Analyse and identify new methods of revenue generation through the production of retail sales opportunities	DEH	Existing resources

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January '05 & Ongoing	1.2.1 Develop educational products in collaboration with Education Department Outreach Program	DEH/SAM Education Dept	Agency's resources
March '05 & ongoing	2.4.2 Promote to appropriate overseas markets through the facilitation of product development opportunities by ecotourism operators. Explore opportunities for exchange program with major UK fossil site to involve staff and/or students.	Coordinator	Agency's resources

2005/2006 Financial Year			
July '05	3.3.2 Continue coordinator to oversee implementation of consistent management and marketing activities plus on costs	SATC/DEH major stakeholders	\$100,000
July '05	2.4.1 Promote to appropriate geological and alumni associations through existing networks of Flinders University, South Australian Museum and other bodies	Coordinator	Coord's resources
July '05	4.2.3 Implement new methods of revenue generation	DEH	Existing resources
December '05	3.2.5 Develop and implement risk management plans at appropriate key sites	DEH/Site owners	\$20,000

Table 7.1 outlines the additional resources required over the next three years to progress the sector based upon successful adoption of the feasibility study and business plan.

Table 7.1 Summary of Additional Resources Required: Three Year Period

Year	Amount
2003/2004	\$30,000
2004/2005	\$350,000
2005/2006	\$120,000
Total	\$500,000

Future Actions

Investigate opportunity to secure World Heritage Site listing for Ediacaran and Nilpena fossil sites in Flinders Ranges.

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