



Visitor Growth Plan 2006 - 2010

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Introduction

The number of people choosing to visit the City each day and throughout the year is a basic indicator of its vitality. Additional visitors make a wider range of services, facilities and attractions viable. They enrich the social experience of spending time in the City and provide activity on the street which helps make the City safer for all. This creates a more vibrant City with a stronger community and cultural life and a more robust, innovative economy.

Visitors have an impact on Council's other growth population targets. A vibrant, bustling City generates more employment, influences students to choose a City-based education and attracts people to live near the action.

Visitors come from a variety of backgrounds and visit the City for a variety of purposes. They come for shopping, leisure and personal business. They are workers or students who come daily and shop in the City at lunchtime or linger after hours to socialise. They are residents who selected city life to have easy access to the City's attractions, enjoying recreation in the parklands or spending time with friends in popular meeting places. They are young people who come regularly to shop in the Mall or frequent the nightclubs and bars. They are tourists who visit from interstate or overseas. They are families who attend annual events or visit the cultural institutions. They are people who come in to recreate in the Park Lands. Whatever this motivation, the City offers a host of unique shopping, cultural, recreational and personal business experiences for all ages, backgrounds and interests.

Maintaining current visitor numbers and growing the visitor population in the face of challenges, such as the expansion of competing regional shopping and entertainment centres, will require a significant effort. The City must reinforce its distinctive advantages, minimize the perceived disadvantages of coming into the City, and vigorously and creatively promote what it has to offer.

No single activity or action can be solely responsible for growing visitor numbers. In order to increase the level of visitor activity a raft of complementary initiatives are required to:

1. Activate the City - provide a diversity of events and attractions
2. Invite to the City - promote the City's uniqueness
3. Build the City - create an attractive, safe and welcoming City
4. Travel to and around the City - provide good transport options and carparking

Jan Gehl in his 2002 report on 'Public Spaces and Public Life' in the City of Adelaide defines the following characteristics of a Good City:

- A Good City to walk in and stay for a while.
- A Good City for social and cultural exchanges.
- A Good City for talking, watching and experiencing.
- A lively, diverse and safe city to move around in.

The Visitor Growth Plan builds on a range of established initiatives and adds new ones, progressively strengthening the qualities of Adelaide as a Good City. It provides clear focus to prioritise actions up to 2010. Together with the Growth Plans for Residential, Workforce and Student populations and other supporting strategies reinforcing guiding economic, environmental, social and cultural principles, it sets out the means by which Council intends to pursue its vision for the City.

The Growth Plans will be implemented through the annual corporate business planning, budgeting and capital works programs of Council. Recognising the many influences and changing dynamics that effect visitor growth, the Visitor Growth Plan will undergo annual reviews to ensure actions maximise impact on current priorities.

Context – Strategic Management Plan – A Vision for the City

The Council's *Strategic Management Plan 2004-2007*, building on the New Directions statements first adopted in 2001, sets the following vision:

“The City of Adelaide, as the Capital City of South Australia, will be a vibrant and populous central place for work, study, leisure and living, invigorating the cultural, commercial, educational and community life of the State.”

The Council's primary strategy in working towards the vision is to:

“Increase the number of people living, visiting, working and learning in the City to an optimum sustainable level.”

Actions to support visitor growth in the City will also directly support the aims of the SA Strategic Plan to:

- increase the State's population to 2 million by 2050, as against the projected decline from the current 1.5 million. (SA Strategic Plan Target T1.7)
- increase visitor numbers and length of stay thereby increasing visitor expenditure in South Australia's tourism industry.(SA Strategic Plan Target T1.13)
- double the use of public transport by 2018 (SA Strategic Plan Target T3.9)

Underpinning Council's strategy are the guiding principles that the City must be culturally vibrant, socially just, environmentally sustainable, economically viable and outward looking.

Specifically the *Strategic Management Plan* seeks to achieve the following qualities for Adelaide as a City for visitors by 2010

Qualities sought for the City by the year 2010

- *The City is a central focus for the cultural and community life of the State, representing and embracing the diverse cultural backgrounds of its people, building social capital by supporting the contribution of community groups and volunteers, and encouraging active citizenship through participation and engagement in public affairs. Indigenous cultures are reflected, acknowledged and celebrated and the expression of Aboriginal and Torres Strait Islander living culture in the City has brought indigenous people together, particularly young people, to celebrate and reclaim their cultural heritage. Disadvantaged people are supported and given the means and opportunity to participate in the civic, cultural, social and economic life of their community.*
- *Adelaide is a safe City with excellent public health and workplace safety systems and relatively low crime rates. It is internationally recognised as a Safe Community by the World Health Organisation.*
- *In its built form and public spaces, Adelaide is an attractive, contemporary city whose people take pride in urban design excellence and innovation while recognising and valuing the City's cultural and built form heritage and the unique features of Light's plan.*
- *The City's distinctive Park Lands setting has been further improved to sustain its ecology and to provide a wide range of opportunities for recreation, sport and leisure fostering wellbeing through healthy lifestyles.*
- *Adelaide has strengthened its reputation for innovation in the arts and for staging outstanding festivals and events, adding vitality to the City's streets and public spaces through art works and public performances. Creativity is valued and given every opportunity to flourish with strong linkages established between the arts, science, educational, public and commercial sectors. Talented people are given support and encouragement to realise their full potential in Adelaide.*
- *The City has strengthened its role as a welcoming, safe and attractive central meeting place for the people of metropolitan Adelaide and beyond. Its cafes, bars, recreation places and public spaces encourage conversation and interaction. Visitors find their way*

around easily, feel secure and comfortable and find vitality and interest throughout the City's streets and public spaces by day and night.

- *The City is a strong central focus for civic and cultural activity, shopping, personal and community services, leisure, events and entertainment attracting growing numbers of daily visitors. As the main centre for specialist health, community support, legal, financial and business services, the City draws visitors from throughout South Australia and encourages extended stays for shopping and leisure.*
- *Young people have an effective voice in decisions and find the City an exciting place for leisure, recreation and social interaction.*
- *Convention visitors and tourists from intrastate, interstate and overseas find the City a showcase for the attractions of the State and are encouraged to stay longer or return.*
- *Access to and from the City is easy by public and private transport with a balance of public transport and parking improvements meeting travel needs. In the main areas of activity pedestrians and cyclists are given priority and throughout the City access is made easier for people with disabilities.*
- *The Airport, interstate Rail terminal and Bus Station are well served by connecting public transport services linking them quickly and easily to the City Centre and the metropolitan public transport system.*

Many of the Council's established services and facilities are essential contributors to the visitor infrastructure of the City, including, in particular:

- U-Park visitor parking.
- Adelaide Aquatic Centre.
- North Adelaide Golf Links.
- Rundle Mall and Central Market management.
- Park Lands management.
- Management of on-street parking.
- Urban Environment Asset Management.
- Street cleansing.
- Public conveniences.
- Events management and sponsorship.
- City marketing.



*"You are Here" branding
in Rundle Mall.*

Significant Council projects currently in progress to make the City more attractive for visitors include:

- North Terrace master plan implementation with the State Government.
- Rundle Mall urban design master plan implementation.
- New Central Bus Station and car-park off Grote Street.

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- “You are Here” integrated marketing campaign.
- “Activating the City” program agreed and funded including North Terrace activity program, Busking Festival and events in the City Squares.
- Commitment to establish street markets in the East End.
- Park Lands improvements, including establishment of recreational loop and return of open lot parking off Frome Street to landscaped Park Lands use.
- Childrens’ interactive play-spaces, beginning with Hindmarsh Square.

Other major State Government and private sector projects impacting on City visitor numbers include:

- Extension of the Glenelg tramway through to the Adelaide Central Railway Station.
- Major Events program including annual commitment to the Fringe and WOMAdelaide.
- City Cross Arcade renovation and expansion.

This Growth Plan builds on the Council’s established services and initiatives already in progress to propose the most effective focus for action over the next few years to pursue the Council’s aim of visitor growth.

About Our City

Adelaide is a city with many distinct features that sets it apart, enticing visitors to spend time enjoying its attractions. According to Professor Jan Gehl, Adelaide has the kind of physical setting that other cities would dream about, with many obvious beauties and qualities to celebrate and refine¹. It is a city of visual harmony and classical style situated beside the River Torrens. Created under Colonel Light's vision of an ideal colonial city, Adelaide retains its appeal as a well planned and liveable city surrounded by a green cushion of parklands and 5 squares within the square mile. With its wide streets and relatively flat topography, Adelaide has a reputation as one of the most accessible cities in the world.² This is supported by public transport, which radiates to and from the city. A respect for heritage is balanced with more contemporary architecture. Inner-city highlights are within easy walking distance from each other, with galleries, museums, universities, the business hub, extensive shopping, relaxed dining opportunities and recreational open spaces all in close proximity. Promoting a great lifestyle, Adelaide is a clean, green city with a relaxed charm.

With a solid economic base, the centralisation of state and city government, the business district and retail precinct not only entices visitors to the city for business and shopping but the extensive workforce also undertakes a range of leisure activities while in the city.

The City of Adelaide is a central location for events, hosting the 6 leading attractions in South Australia³ with the Adelaide Central Market topping visitation numbers with 8.5 million visitors recorded during 2004/2005.⁴ The Adelaide Bicentennial Conservatory, Migration Museum and the National Wine Centre compliment other significant attractions including the State Library of South Australia, Adelaide Botanic Garden, the South Australian Museum, the Art Gallery of South Australia and the Adelaide Zoo.

Indigenous arts and culture are recognised as a significant part of culture with the South Australian Museum housing the most significant collection of Indigenous Australian cultural material in the world. Tandanya Aboriginal Cultural Institute, a multi-arts complex, explores contemporary and traditional Aboriginal cultural expression.

Adelaide is known for hosting major events without compromising intimacy and accessibility. These events make a significant contribution to the vibrancy and creativity of the City. The biennial Adelaide Festival of Arts, considered alongside the Edinburgh and Avignon Festivals, is one of the leading festivals in the world and the Adelaide Fringe is the second largest worldwide.⁵ WOMAdelaide (World of Music Arts and Dance), timed to coincide with the Festival and Fringe, further underscores Adelaide as an arts destination.

Events such as the Christmas Pageant, Carols by Candlelight, Symphony Under the Stars and the Lord Mayor's New Years Eve Street Party have become favourite annual traditions for South Australians; and Carnevale, Glendi Festival, and the Schutzenfest celebrate our diverse and colourful cultural heritage. Further variety and appeal can be seen through events like Clipsal 500 Adelaide which has achieved national and international recognition and entered the South Australian Tourism Hall of Fame (2001-2003).⁶

¹ Jan Gehl, *Public Spaces and Public Life City of Adelaide: 2002*, City of Adelaide, Adelaide 2002

² City of Adelaide, *Access Adelaide: Access Action Plan 2006 – 2010*

³ South Australian Tourism Commission, *Visitation to Major Attractions and Events in South Australia - 2004/2005 Edition*, South Australian Tourism Commission, Adelaide, September 2005

⁴ Ibid, p 3

⁵ Arts SA, *Adelaide Arts Capital*, SA Government, Adelaide, 2006

⁶ The attendance numbers of these major events attests to their importance for South Australians. The South Australian Tourism Commission (2005 op cit ps 3-11) estimated that in 2004/2005 attendance numbers were: Christmas Pageant – over 300,000; Carols by Candlelight – 30,000-35,000; Symphony Under the Stars – 30,000; Lord Mayor's New Years Eve Party – 26,000, Carnevale – 32,000, Glendi – 30,000 and Schutzenfest – 23,460; Clipsal 500 Adelaide – 255,600.

About Our Visitors

Visitors make an important contribution to the City. They enrich the social fabric of the City, contributing to a diverse and inclusive social mix that plays a considerable part in creating a vibrant and dynamic city with a stronger community and cultural life and a more robust, innovative economy. Building visitor numbers will support the viability of a wider range of services, facilities and attractions. Significant activity on the street and in public places contributes to a greater sense of safety, which in turn, generates further activity.

Visitors have an impact on Council's other growth population targets. A vital, bustling City supports commercial success which generates more employment; influences students to choose a City-based education; and attracts people to live near the action. The Clipsal 500 provides one example of the economic benefit brought by visitors. The 2005 event produced a benefit of over \$25 million to the State and created employment equivalent to over 340 full-time positions⁷.

Through the course of various visitor and user surveys conducted over the past few years, there is a growing base of knowledge about who is currently attracted to the City, what they do when they arrive, and what they would like to do more of. The priorities and actions identified in the Visitor Growth Plan are based on the research undertaken to date. This section provides a brief overview of the key facts about visitors. A more detailed profile of the City's visitors is provided in Appendix 1.

Metropolitan Adelaide is the largest source of City visitation with 84% of visitors, the majority coming from the 10km area around the City.

On-street surveys indicate the main reasons why people were in the City.



A research study conducted by Professor David Yencken for the City commented that “*an initial test of the vitality of a city centre is to find out to what degree it depends on those who are working in the city to support its retail, entertainment and cultural facilities. A lively city attracts people directly for these activities; a dead city relies significantly on those who have to be there for work or other reasons*”⁸. This survey reported that for 1994 and 1996 no more than 37% of City users surveyed on-street on weekdays were there for work. The Council's

⁷ South Australian Tourism Commission, (2005) Op cit p28

⁸ Yencken, David 1997, How People Perceive and Use the Adelaide City Centre, 1994 and 1996. p ii

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City User Segmentation Study conducted in 2005 found only 34% of those surveyed on-street during the week were there for work. These are relatively healthy findings.

Shopping is the largest single reason given for visiting the City (other than work) with entertainment / dining and meeting friends also important. City shopping trips are often primarily a leisure activity with strengths in fashion and specialty goods in Rundle Mall and the food and cultural experiences of the Central Market. Shopping trips are often combined with eating, drinking and social activity. This is reflected in market segmentation studies which identify three main segments to target for increased visitation:

Shopping Admirers:

- High proportion of females that are middle-aged
- Use of the City is very retail-focussed
- Feel that City shops are unique, provide a great range and are the best stores in Adelaide
- Tend to visit the City at least every couple of months
- High potential to increase visitation frequency and retail spend in the City

Diners and Drinkers

- High proportion of 18-34 year olds in couple or single households with no children
- Likely to be in paid employment or study and to reside in the inner 10km area of the City
- Feel the City has the best nightlife, pubs and clubs and is the best place to celebrate
- The majority visit the City at least monthly and are attracted to Rundle Mall, Rundle Street and North Terrace
- Frequent retail shoppers and socialisers



Evening diners on Gouger Street

Family Loving

- High proportion of 35-53 year olds in family households
- Personal income tends to be over \$50,000 per year and most are in paid employment
- Very positive attitudes to the City and consider it a great destination for family outings and a range of entertainment options
- Relatively high frequency of visiting the City - especially Rundle Mall and North Terrace



Carols by Candlelight
- a favourite annual
family event.

Apart from those who visit the City specifically for leisure or personal business, workers and students also contribute to visitor activity when they shop or socialise during breaks and after work or study. Recent research has shown that while metropolitan residents may be visiting less often, the City's growing worker and student populations are adding visitor-type vibrancy – they are engaging more in City life, undertaking other activities such as shopping, dining and socialising while in the City for work or study.

Tourists from intrastate, interstate and overseas are another important contributor to visitor activity in the City. On-street research showed that 6% of people in the City are staying in short-term accommodation (and hence are classified as tourists). Just over half of the tourists were from interstate, a quarter from overseas and a quarter from Intrastate.

The South Australian Tourism Plan 2003-2008 analyses the main opportunities to attract more tourist visits and seeks to reinforce the following core themes especially relevant to the City:

- Wine and Food
- Festivals and Events
- Arts and Culture

It also promotes as complementary themes:

- Aboriginal Tourism
- History and Heritage
- Sport Tourism.

The Plan recognises the importance of niche markets for South Australia, including convention visitors, backpackers and family and friends of overseas students. It emphasises the need to provide authentic, rather than contrived, experiences.

“An authentic destination is defined by its ‘villages’ or ‘special places’ which are integral to the daily working lives and culture of the local people.

These special places reflect the soul, character and charm of a destination. They give it a sense of place and a sense of continuity with the past. It is the local people who give these places a sense of value and vibrancy.

Adelaide, with its renowned town plan and a large stock of fine heritage buildings, stands as a powerful symbol of a state which cherishes its past and traditions.

Adelaide’s special places include North Terrace, Central Market, Jetty Road, Port Adelaide, The Parade, O,Connell Street, the East End, Hindley Street and Semaphore. The distinctive architecture and history of these locations makes them unique.”⁹

⁹ South Australian Tourism Commission, South Australian Tourism Plan 2003-2008. State Government, Adelaide, December 2002, p 31.

The Challenge

The vitality of the City is largely dependent on its ability to attract people for shopping, leisure and personal business visits together with its ability to encourage City workers, students and residents to spend more time and engage more fully in the life of the City.

As a City for visitors, Adelaide has many strengths on which to build:

- The main cultural institutions of the State are focused in the City and it is the hub for most major events.
- It is the gateway to the State for most tourists with the greatest concentration and range of visitor accommodation and attractions.
- The City is the main focus for the metropolitan public transport network.
- Compared to city centres elsewhere, Adelaide has maintained a strong and diverse retail base.
- The growing day-time population of workers and students helps generate vitality and creates demand for the City's shops, eating and drinking places and entertainments.
- The City is also the regional centre for the central metropolitan area, with a relatively high population density and rate of growth as preferences over the past few years have shifted in favour of inner urban living.

However the growth of alternative attractions elsewhere in Adelaide has drawn metropolitan visitors away in recent years and could threaten the sustained vitality of the City. Research surveys consistently show that shopping constitutes the largest single purpose for City visitation, followed by social and leisure activities. Since the late fifties the development of metropolitan Adelaide has seen the growth of suburban and regional centres that have provided alternative destinations supporting a shift towards more suburban lifestyles.

More recently, the City as a shopping destination has been further challenged by the deregulation of shopping hours throughout the metropolitan area from initially Sunday trading and now week-day late night shopping.

Other challenges to the City maintaining its capacity to attract growing numbers of visitors are:-

- Changes in consumer lifestyle - characterised by time poverty, price competitiveness, diminishing loyalty, convenience.
- Expansion of retail floor space - growth of suburban and regional centres, emergence of brand direct clearance outlets (such as Harbour Town) development of superstores, revival of traditional strip/main street shopping café precincts with specialist retail and mixed uses
- Proliferation of event and entertainment activity in metropolitan and regional shopping centres such as the inclusion of multi-screen cinema complexes, expansion of food and drink options and school holiday entertainment.
- The spread of suburban living and increase in car travel time
- Suburban precincts such as Jetty Road, Holdfast Shores, Henley Square, Norwood Parade and Mawson Lakes providing a range of dining and leisure alternatives to the City.
- Perceived disadvantages of the City relative to suburban alternatives in terms of the cost and availability of car parking.

The Council's initial response to the emergence of suburban alternatives in the 1970s centred on creating Rundle Mall for pedestrians, supported by the development of off-street parking around the Mall. These developments and subsequent increases in Council's share of the

off-street parking business have been very successful in maintaining the City's attractiveness for shoppers.

Retailing will remain a key driver of visitor growth. Rundle Mall, supported by specialist City retail precincts, remains the dominant and most diverse metropolitan centre and is nearly twice the size of Westfield Marion, the largest regional centre. The Central Market precinct in its own right ranks as the fifth largest retail centre in the metropolitan area. However, specific Council responses are essential to maintain and enhance market share. Accordingly, the approach proposed in the Visitor Growth Plan seeks to ensure that the City's distinctive retail advantages and attractions for visitors are reinforced and strengthened.

The City's attractions as a place to socialise, engage in cultural and civic activities, enjoy leisure, entertainment and dining, and to access services, are also essential to its potential for visitor growth, and an important element in its retail strength. The qualities that make the City and its precincts attractive to local visitors also form part of the 'authentic' experience of Adelaide targeted in the South Australian Tourism Plan to attract tourists.

Therefore, the Visitor Growth Plan considers the City's diverse market segments and the key drawcards for visitation and proposes initiatives which include the following:

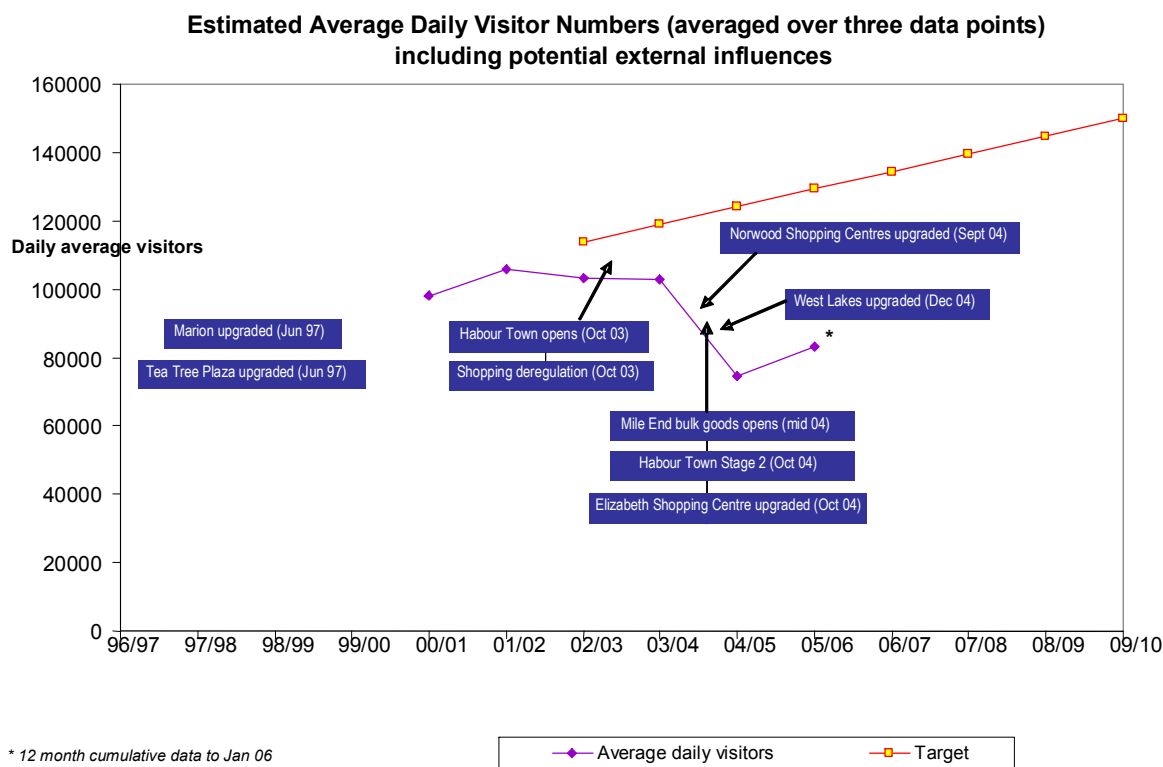
- Strengthen the City's retail and tenancy mix
- Create a vibrant and interesting public realm and program of activities that attracts people to the City and encourages them to stay longer
- Improve the ease and attractiveness of parking in the City
- Increase public transport opportunities in the City.
- Establish a comprehensive program of events and activities
- Improve the Park Lands and Torrens frontage for leisure and recreation.
- Create a safe and welcoming city

The actions outlined in this Plan will not guarantee that the visitor growth target will be achieved. However, they are essential if the City is to meet the visitor growth challenge.

Measuring Visitor Activity.

Monitoring visitor numbers has been based on regular surveys of the metropolitan population to determine perceived frequency of visits to the City for reasons other than work. This has then been used as a basis to estimate the daily average number of non-work visits to the City.

The following graph shows the data since 1996/97 and the external influences that may have had an impact on City visitation. Due to the variation in the figures recorded, a rolling average of the last three data points is used. The most recent data shows a slight increase in the number of average daily visitor numbers after a significant decrease in 2004/05.



This method of monitoring visitor numbers provides a consistent time-series tracking of visitation frequency across the metropolitan population. However the method has limitations:

- It does not properly take into account 'visitor' activity of workers, students and residents
- It includes visits for 'study'
- It does not take into account length of stay and the apparent trend of people doing more and staying longer in the City
- It is heavily influenced by loss of metropolitan visitors to competing suburban shopping and leisure alternatives

By this measure there has been a 25% drop from the 2001 base figure making the 2006 and 2010 targets (125,000 and 150,000 respectively) unrealistic.

In 2003, digital movement counters were installed in Rundle Mall providing a direct measure of the level of on-street activity in the heart of the City. With nearly three years of data now available, this gives a very effective means to track trends in 'visitor' activity. There are other benefits to using this method of monitoring visitor numbers:

- It reflects increased 'visitor' activity of workers, students, tourists and residents, as well as the visits of metropolitan residents
- It reflects retail activity but also picks up visitor activity generated by leisure trips, events and tourism since most visitors spend some time in Rundle Mall during their stay. Recognition that the counters measure visitor activity beyond just retail activity is supported by movement data that is recorded when retail businesses are closed.

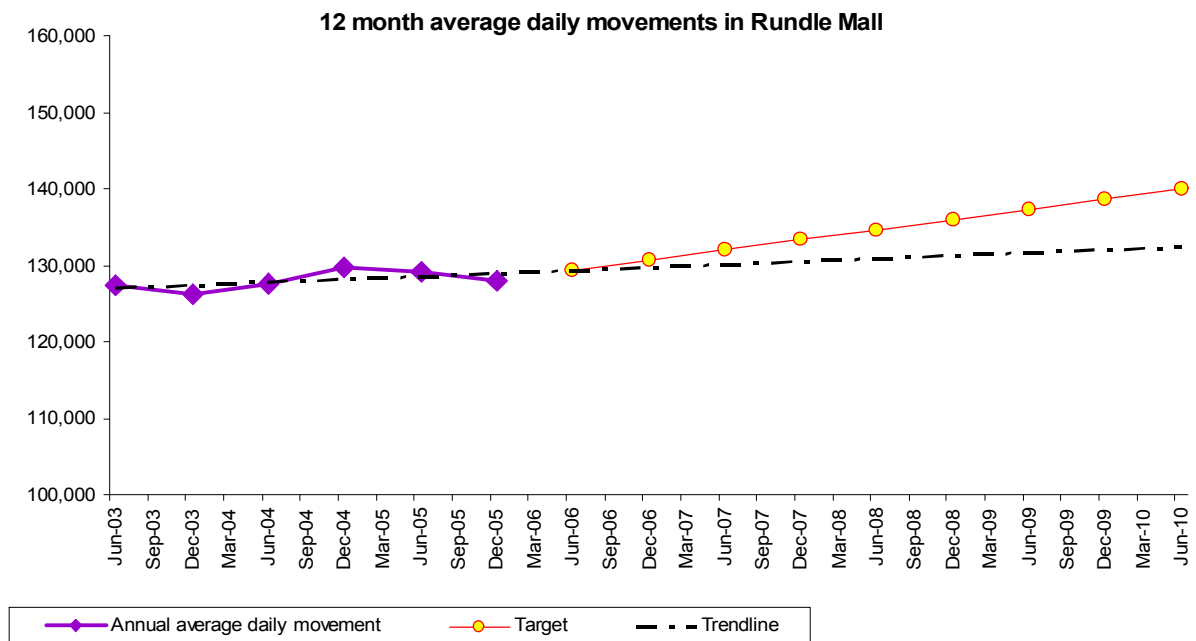
For these reasons, a new target is proposed, based on the digital on-street movement counters installed in 2003 in Rundle Mall (the former target based on the omnibus survey will be retained as a secondary indicator of growth).

By 2010 visitor activity in the City will have grown to generate daily movement counts of at least 140,000 in Rundle Mall.

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The current average daily movement count in Rundle Mall is 125,000. The target therefore represents a sustained targeted growth of 3% per annum on the current level of visitor activity, generated by the actions proposed in this Growth Plan.

The trend shown by the Rundle Mall counters (see graph below) indicates that the fall-off in metropolitan visitors has been off-set by the additional 'visitor' activity of City workers, students and residents, and by growth in tourist numbers.



Both the above graphs indicate that intervention is required to turn around and improve the attractiveness of the City for all visitor activity.

In the longer term, in order to broaden the focus of data collection from Rundle Mall and capture visitors to our cultural boulevard, it is proposed to add other digital movement counters to North Terrace and other key locations. After one year from installation, data could be reported as a supporting indicator and following two years of data collection the information could be incorporated in any reassessment of the target. The installation of the counters has been included as an action within "Activating the City".

The Approach

The market research and visitor surveys conducted over the past few years reveal that there is no single, easy response to achieving the visitor population growth target. Rather, a cocktail of initiatives is needed that respond to the challenge and the diversity of visitor activity in the City in order to foster visitor growth.

In order for Council to meet the visitor growth target it will need to deliver initiatives that can effectively generate visitor growth in the City. A suite of actions will be necessary to:

1. Activate the City - provide a diversity of events and attractions
2. Invite to the City - promote the City's uniqueness
3. Build the City - create an attractive, safe and welcoming City
4. Travel to and around the City - provide good transport options and carparking

Specific activities and actions within each of these four themes will seek to achieve the visitor growth target by attracting, enabling or supporting increased visitor activity.

Attractors

'Attractors' are initiatives that have a direct consequence on visitor growth because they will directly attract visitors and will deliver a measurable increase in visitor numbers. Programs and events, for example, are 'attractors' of visitation because people choose to come to the City for what's on offer.

Enablers

'Enablers' are initiatives that indirectly contribute to visitor growth. They are essential to facilitating growth because they contribute to the quality of the visitor's City experience. Safety initiatives, carparking strategies and improvements to the public realm, for example, are considered 'enablers' of visitor growth because they provide a platform for the 'attractors'. 'Enablers' are necessary – but not sufficient – to drive visitor growth.

Supporting Initiatives

'Supporting initiatives' do not have a measurable effect on visitor growth. They have a cumulative, incremental effect and are recognised as being important contributors to maintaining visitor numbers and ultimately achieving the visitor population target. 'Supporting Initiatives' are not included in the Visitor Growth Plan but are tabled in Appendix 3.

1. Activating the City

1.1 Conduct programs and events that activate the City

Creating activity and offering programs and events that will contribute to the vibrancy of the City is arguably the key to increasing the visitor population. A once-off survey specifically looking at the impact of events on visitation, conducted in December 2003, identified that 44% of all people who use the City had attended special events that had been held in the past year. 28% of respondents reported that there were events they had attended which were regular events they attended every year or most years. The survey identified that people would like to see more performance, art, sporting and cultural events. This was also supported in the 2005 Users Segmentation Study where 17% of those identifying factors that would increase visitation to the City mentioned events and activities in the City.

Council's approach to this theme will be to work in partnership with a range of City stakeholders to create and promote the activity level that will draw people to the City; that will motivate them to drive to the City or take public transport. Simply put, we need to provide the reason for people to come to the City for leisure. This will be undertaken with due financial responsibility. Programs and events will be carried out in a manner that achieves value for the resources used. . The timing of specific events to coincide, such as the Festival, Fringe and WOMAdelaide can act as a significant drawcard for interstate and overseas visitors as it provides a critical mass of activity ensuring excitement and colour. Also working with the State Government¹⁰ in developing a balanced program of events and festivals will position the City as a place that is good to visit at any time because there is always something exciting happening.

The Visitor Growth Plan proposes a series of exciting initiatives to draw people to the City and create the atmosphere that will keep them coming back.

Visitor Growth Actions

- *Continue to deliver the Major Events/Activities Sponsorship Program to support the attraction of major events in the City*
- *Operate a weekly street market in Rundle Street*
- *Conduct an annual international Busking Festival*
- *Continue a partnership with the SA Museum to deliver regular activity on North Terrace*
- *Continue Council's signature events such as Lord Mayor's New Years Eve Party, Australia Day and ANZAC Day events*
- *Conduct a city-wide "Christmas in the City" program featuring the Lighting of the Christmas tree event and precinct-specific promotions*
- *Influence the timing and content of major events to promote a spread of attractions over as much of the year as possible*
- *Supplement key events (eg Christmas Pageant) with activity aimed at keeping visitors in the City for longer*
- *Support the South Australian Tourism Commission objective to develop a balanced program of events, festivals and conventions.*

¹⁰ South Australian Tourism Commission (2002) Op cit p 24 detailing Objective 1.4

The Lord Mayor's New Years Eve Party is a popular annual event



1.2 Develop visitor attractions in the City

Unlike other regional centres within metropolitan Adelaide, the City has a unique diversity of land uses, facilities and attractions that offer a range of experiences to visitors. Facilities and features such as art galleries, the museum, zoo, Botanic Gardens, Tandanya, libraries, the River Torrens, the Park Lands, as well as the large variety of commercial and service premises concentrated along our 'main streets', provide a complete experience for visitors – the City is more than just a shopping destination.

The "City Visitation Research Segmentation Study 2005" tested the potential impact on visitation frequency for a series of propositions. The propositions covered street markets, children's hands on museum, cinema in the Mall, scenic observations area/viewing platform, childcare in Rundle Mall and an indoor playground. Visitors were asked how often they would visit each of these attractions.

The street markets received the strongest response followed by the cinema in Rundle Mall. The scenic platform received some support, but would not provide frequent visitation. The facilities for children, such as the hands-on museum, indoor playground and childcare, did not demonstrate strong potential for increasing visitation - not even among the "family-loving" segment. The propositions that have shown potential for impacting on daily visitor numbers are reflected in the suggested attractions to be developed to activate the City.

The utilisation of LED (Large Electronic Display) screens for public viewing in the public realm is relatively new, with the most notable LED screen found in Federation Square in Melbourne. They provide a popular and contemporary medium for community information, news, sport, advertising and entertainment, such as music clips and digital art. The main feature of the Federation Square LED Screen is the live video camera function, which attracts a lot of attention as people waking past stop to look at themselves on a large screen.

Council is in the process of scoping the installation of a 'Times Square' to maximize the screen's potential. This will be a unique and exciting feature that will add to the City's appeal and vibrancy. Issues such as location to enable people to congregate, content development, management and costs are currently being investigated. There is considerable private sector interest in building on this initiative by installing similar screens at other suitable locations.

The City's Aboriginal cultural attractions, such as the Bush Tucker Trail in the West Park Lands, Tandanya, the internationally acclaimed Museum exhibition and the Karrawirra parrri (River Torrens) Walking Trail, are an unrealised potential for visitor growth.

Aboriginal Culture is an important part of the State's Tourism Plan and accordingly the State has appointed an Indigenous Tourism Industry Development Advisor to assist in building national and international awareness of the State's Aboriginal History and Culture.

SATC is currently looking at forming partnerships to expand the State's market share in this niche market. Whilst the City of Adelaide is unable to compete with the offerings of both

interstate and intrastate competition, it can become the Gateway for the Aboriginal Culture tourist experience in SA. It is proposed that Council develop, in partnership with the State Government and Aboriginal stakeholders, an Aboriginal Tourism Strategy that will strengthen the City's Aboriginal cultural experience. A two-pronged approach will be developed that:

1. Improves and promotes existing attractions and activities
2. Develops a contemporary approach to the Aboriginal cultural experience eg interactive, performance arts and value-adding

Visitor Growth Actions

- *Support an enhanced Rundle Mall retail and tenancy mix*
- *Develop policy and operating guidelines for Electronic Display Technology that will promote the installation of LED screens in the City, building on the 'Times Square' initiative*
- *Complete the Hindmarsh Square Interactive Science Learning Playspace*
- *Facilitate a Panorama Observation Area at the Santos building*
- *Facilitate the development of a ten-pin bowling facility in the City*
- *Facilitate the development of a cinema complex in Rundle Mall*
- *Develop an Aboriginal Tourism Strategy, in partnership with SATC and Aboriginal stakeholders, to strengthen and improve the City's Aboriginal cultural attractions*



Indicative drawings of the "Times Square" concept

1.3 Establish infrastructure and processes that support events and activity

The Squares and Park Lands are popular venues for conducting community events and the City's diverse range of event sites are one of its key assets. In order to enable greater utilisation for events and activities, infrastructure such as power and water has been installed in a number of parks and squares. The installation of event infrastructure will continue in other priority locations to allow for even greater use by the community for this purpose.

However, additional action is required to continue to remove the barriers that inhibit utilisation of the Park Lands for community events.

Community and event organisers express frustration with the experience of holding an event or activity in the City in the areas of planning, fees, approvals and regulations.

The Visitor Growth Plan proposes a range of strategies to simplify procedures and support the conducting of events in the City.

Visitor Growth Actions

- *Implement the Elder Park Masterplan to upgrade the Riverbank precinct and create a major events area*

Visitor Growth Plan 2006-2010

- *Review Council processes, fees and requirements to remove barriers that discourage community groups from conducting events in the Squares and Park Lands*
- *Reinforce and strengthen the role of Council's Events Team as a "one stop shop" for organisations holding events in the City*
- *Increase the use of Squares and Park Lands for events through the installation of event infrastructure such as power and water*
- *Install a digital movement counters at appropriate locations, including North Terrace*

Elder Park: a delightful riverbank setting that is a powerful attractor



2. *Inviting to the City*

2.1 Promote the City to metropolitan residents

The Adelaide City Council has recognised the need for a strategic and targeted marketing campaign to support the Council’s Strategic Management Plan (2004-2007) and assist it in achieving its population growth targets.

In 2004, Council launched its Integrated Marketing Campaign (You Are Here – Adelaide). The campaign sought to build awareness within metropolitan Adelaide of what the City has to offer. In 2005, this was refined further and stage 2 was implemented. Emphasis was placed on living, working, studying and visiting the City within the You are Here – Adelaide campaign in order to build upon the awareness of the City as the first choice destination for all of these activities.

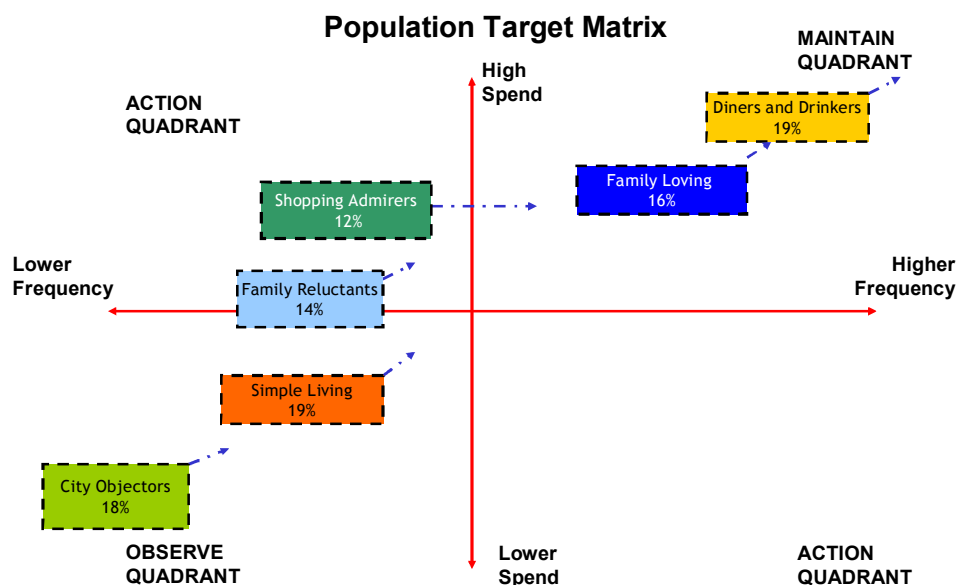
In addition, a new advertising campaign was launched in 2005 for Rundle Mall under the “You Are Here” banner positioning Rundle Mall as the major shopping destination and experience within the state. Stage 2 of the Rundle Mall advertising campaign was introduced later in 2005 with a further refinement of the positioning of the Mall and a strong focus on the unique advantage that the Mall has to offer – “More Choice”.

For the marketing campaign to continue to be effective, it now needs to penetrate specific segments of the population that have the most potential for increased visitation to the city. This will be done by influencing their perception and behaviour regarding City visitation.

Segmentation research identified six key market segments:

- Shopping Admirers
- Diners and Drinkers
- Family Loving
- Family Reluctants
- City Objectors
- Simple Living

By combining the current frequency of visitation to the City and the current spending potential of each population segment, the target matrix over the page was formed. Those segments lying within the Action and Maintain quadrants in the target matrix have been classified as opportunities within the short term (1-3 years) for the Adelaide City Council, and will be the focus of Stage 3 of the Integrated Marketing Campaign. These groups will provide an immediate return in terms of visitation with the least financial investment (as it is easier to influence their behaviour and perceptions).



Stage 3 of the Integrated Marketing Campaign will continue to build on existing strategies implemented in Stage 1 and 2, but will also incorporate more targeted marketing of the City through segmentation marketing, delivering specific messages for specific groups.

The key strategies of Stage 3 of the Integrated Marketing Campaign -Market the City are:

- Maintain the successful overarching “You are here - Adelaide” program by continuing to use television as the main delivery mechanism
- Work closer with event organisers and use events as a major driver of visitation through strong promotion of these events and activities
- Develop targeted programs/campaigns that speak directly to identified market segments and deliver measurable calls to action eg, retail, special offer campaign
- Maintain ongoing market segment research to monitor behaviour changes, identify key motivators and inhibitors, to determine communication requirements and ensure appropriate target marketing of these segments

Long term strategies (2-5 years) for moderate and infrequent segments (Family Reluctants, City Objectors, Simple Living) are unlikely to be implemented in the first year. While all marketing activity within the short term will have some impact on these segments, to what extent it will change perceptions and/or behaviour is debatable. It is anticipated further market research will be undertaken to determine feasibility of targeting/converting these segments.

Visitor Growth Actions

- *Continue the Integrated Marketing Campaign, incorporating the “you are here – Adelaide” campaign*
- *Continue to implement the Rundle Mall Marketing Program*
- *Continue the UPark Marketing Campaign*
- *Conduct a targeted on-line youth marketing strategy*
- *Develop targeted programs/campaigns that speak to directly to identified market segments*
- *Conduct market segment research*

2.2 Promote the City to national and international visitors

The growth of national and international visitors to the City provides an opportunity to improve the City’s vibrancy and appeal whilst increasing visitor numbers.

The on-street component of the Adelaide City Users Segmentation Study 2005 showed that 6% of people in the City are staying in short-term accommodation (and hence are classified as tourists). Mostly tourists come from outside the metropolitan area with 57% from interstate, 27% from overseas and 16% from within South Australia. The main reasons for tourists visiting the City were shopping, meeting friends, for leisure and entertainment reasons, or for personal business.

There are five key organisations, excluding Council, within the State that play an important role in the development and growth of the tourism market for South Australia:

- South Australian Tourism Commission (SATC)
- Adelaide Tourism Marketing (ATM)
- Australian Major Events (AME)
- Eventful Adelaide
- Adelaide Convention Tourism Authority (ACTA)

Primarily the role of the State Government and these key tourism agencies is to attract people to South Australia and to regional Adelaide (i.e. the whole metropolitan area). The role for Council is to promote the *City* as a tourist destination.

Council's current involvement in tourism is an annual funding contribution of \$180k to Adelaide Convention Tourism Association and \$80k to Adelaide Tourism Marketing Board. Council also supports the attraction of interstate and international visitors to the City by providing sponsorship (\$1.2m) to major events in the City and supporting the Visitor Information Centre located within Rundle Mall.

The State Government has a number of marketing strategies in place focused on attracting tourism into the State. However only a very small portion of this activity and funding is focused specifically on the City of Adelaide. The opportunity exists for Council to form stronger partnerships with the State Government and key tourism agencies and maximise the City as a key destination. The development of a Tourism Strategy for the City, prepared in conjunction with the South Australian Tourism Commission, has potential to focus activity and the promotion of Adelaide as a tourist destination. As such, a collaborative relationship with the Tourism Commission should be sought.

Visitor Growth Actions

- *Develop a partnership between SATC and Council for an integrated marketing campaign that positions the City as a key tourist destination in South Australia*
- *Liaise with the SATC with a view to jointly developing a Tourism Strategy for the City*
- *Continue to fund Adelaide Convention Tourism Authority (ACTA) and Adelaide Tourism Marketing (ATM) (or equivalent)*

3. Building the City

3.1 Create a vibrant and exciting public realm that attracts visitors

There is a substantial body of research that demonstrates the importance of public realm and public space as a driver of visitor growth and economic activity. An independent study was commissioned by Council¹¹ to gain a better understanding of the likely impact of spending on different types of public realm, based on examples of public realm investment interstate. The report highlighted the various quantitative and qualitative benefits associated with public realm spending on improvements to city squares, Mall upgrades, expansion of public open space, public transport improvements, amenity upgrades to streetscapes and the provision of public art.

The report asserts that the public realm improvements that will generate significant benefit are those which improve accessibility, walkability, safety and amenity. These types of improvements tend to induce visitors to stay longer and/or attract new visitors to the area. This in turn attracts more retail and business investment in the area.

These findings are consistent with those of the City of Melbourne in its 2004 "Places for People" report¹². The key message from this report is that consistent and well-planned improvements to public places can have a large effect in terms of attracting more public life to a City. The report followed on from an initial study in 1994 that presented a factual picture of the types and quantity of activity occurring in the City of Melbourne's public spaces. The 1994 report set 10 year targets for attracting more people into the City and benchmarks for measuring progress. When compared with the 1994 report, the results showed that in 2004 the City of Melbourne had:

- A better pedestrian network
- More gathering spaces that welcome everybody
- Livelier and more active streetscapes
- More people taking advantage of the 24-hour city

The major achievements from this systematic and coordinated approach to investment in public space for the City of Melbourne has been:

- A larger residential community
- An increasing student population
- Improved streets for public life
- New squares, promenades and parks
- A revitalised network of lanes and arcades
- City-wide arts programs
- More places to sit and pause
- Attractions and places to go
- A 24-hour city
- Better cycle and public transport access
- An integrated policy for street treatment and furniture
- A greener city.

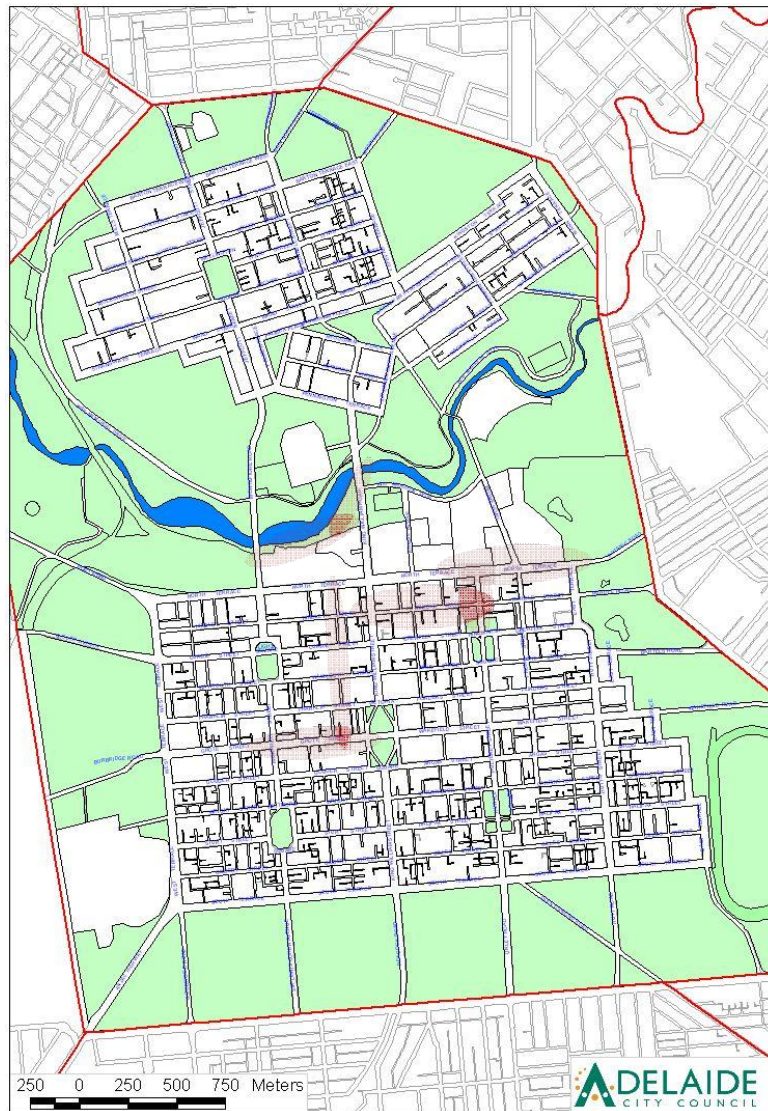
The report concluded that these achievements have been the catalyst for significant increases in pedestrian traffic (including city visitors) in the City of Melbourne, both during the day and in the evenings.

Professor Jan Gehl, author of many reports on the public realm, including the joint Council/State Government study *Public Spaces and Public Life - City of Adelaide* (2002)

¹¹ MacroPlan, *Public Realm Investment Economic/Visitor Impact Assessment*, July 2005

¹² City of Melbourne and Jan Gehl, *Places for People* 2004

espouses the benefits of establishing a lively and safe public realm. His studies recommend providing for a range of activity in the public realm. He characterises a good city as one that people feel compelled to stay in for a while, to be social in and have cultural exchanges; that is good for talking, walking, watching and experiencing; and that is lively, diverse and safe to move around in.



The City of Adelaide map depicting areas of high pedestrian movement.

Adelaide City Council has also recently commissioned two reports examining the retail mix of Rundle Mall and the state of retailing in the City in general^{13 14}. These reports presented a number of recommendations, of which some related to improvements to the public realm. In particular:

- Apart from its retail offer, Rundle Mall's other major point of difference is its location and the atmosphere generated by such a location. This can be enhanced by improvements to the public realm aimed at reducing visual clutter, more entertainment opportunities both in and near the Mall and special events to entice new customers to experience what Rundle Mall has to offer. Major shopping centres

¹³ Jones Lang LaSalle, Retail Mix of Rundle Mall Consultancy Report, 2005

¹⁴ Urbis JHD, Analysis of Retail Trends in the City of Adelaide, 2005.

tend to be refurbished every 5-7 years – Rundle Mall is in need of a face lift to keep it fresh.

- The look and feel of Rundle Mall and its environs are not as good as they could be. The tired physical appearance of the Mall itself and the substandard image of some of the retailers results in an overall image that will not deter the youth element of the visitor population, but will certainly deter some of the more mature elements whose patronage is sought by the city. Raising the level on these attributes will raise the quality of the Rundle Mall shopping and social experience.
- Hindmarsh Square is a major asset to the Rundle Mall precinct that is largely under-utilised. Further active uses should be encouraged.

In recent times the Council has actively pursued the rejuvenation of the public realm as a catalyst for private development as well as to improve opportunities for economic, social and cultural exchange. Initiatives such as the upgrade of sections of Hutt, Halifax, Gouger, Hindley, Melbourne, Pulteney and King William Streets and, more recently, North Terrace and Moonta Street, have all had flow-on effects for the adjacent areas.

The Rundle Mall Urban Design Master Plan endorsed by the Council in December 2003 provides a framework for improvement of the Mall precinct over the next 5-10 years. It recognises the role of the Mall as a meeting place, the need to extend activities into the evening, the importance of the Pulteney St and King William Street entrances to the Mall, and the connecting minor streets and laneways.

Visitor Growth Actions

- *Upgrade Rundle Mall through implementation of the Rundle Mall Masterplan, including facilitating the development of a dining facility*
- *Complete upgrade of North Terrace*
- *Upgrade Central Market environs*
- *Upgrade the minor streets and laneways, with an initial focus on areas of high pedestrian usage in the vicinity of Rundle Mall and the Station to Central Market link*

Part of Adelaide's cultural boulevard after stage one of the North Terrace upgrade



3.2 Make improvements to the Park Lands

The recreational and environmental landscapes of the Park Lands are an essential element of Adelaide's character. They form a unique open space system surrounding the City that positions Adelaide at the forefront of urban design.

The reclaiming of alienated Park Lands provides unique opportunities to gain additional open space in the City, enhancing connections between the built form and the Park Lands. Two sites recently placed in the care and control of Adelaide City Council are the former RAH car park on Frome Road, and a parcel of land along the Torrens Lake, west of the Morphett St bridge. Both of these sites are ideally suited for development as high visitation parks due to

their size and connections with the adjoining Park Lands and immediacy to key features, such as the Botanic Gardens and the Torrens Lake. Both sites are also within close proximity to the CBD.

Major sporting facilities such as Adelaide Oval and Victoria Park/Bakkabakkandi regularly attract large numbers of visitors to the City. At times, this includes visitors from interstate and overseas. Redevelopment of Victoria Park/Bakkabakkandi as a modern multipurpose recreation and sport facility will result in a park that has the capacity to host a mix of major sporting and cultural events and ongoing community activities. The redesign will be guided by a Community Land Management Plan ensuring the park remains accessible to the community by returning significant built areas to open space. Bringing to life the old grandstand combined with new modern facilities will transform Victoria Park/Bakkabakkandi and allow the staging of a greater range of activities, some of which are currently held in less suitable locations throughout the Park.

There is growing demand from the community for informal recreation opportunities. Council already has a number of key facilities within the Park Lands that attain steady visitation. These include the Adelaide Aquatic Centre, City Skate Park, Kurrangga BMX Track, and numerous playgrounds. Council should continue to explore opportunities for provision of additional informal recreation facilities that complement the Park Lands environment, while ensuring current facilities are well maintained to sustain their levels of usage.

The Adelaide Park Lands Trail responds directly to this trend of informal recreation through the provision of a shared use trail that targets the growing walking and cycling visitor market. Circulating the City and connecting the Park Lands system, the Park Lands Trail will add to South Australia's list of iconic trails. In the spirit of the Adelaide Park Lands Act, the Trail will integrate Adelaide City Council's managed areas of the Park Lands with the State Government's, incorporating features such as the Botanic Gardens, West Terrace Cemetery and Adelaide Gaol.

The appeal of the Adelaide Park Lands is in the richness of its diversity that offers visitors a range of experiences. Council should continue to protect and enhance its natural areas to ensure the biodiversity of the Park Lands is conserved.

Specifically, Council should continue to make improvements to its riparian environments. Seeing and being next to water is a key component in a visitor's decision making process. Located within the City, the River Torrens/Karrawirra Parri provides opportunity for increased visitor growth through further enhancements to the Riverbank Precinct and increased programming of activity on the water.

The Park Lands also have a significant role to play as entrances to the City, setting the tone for what goes on in the rest of the City. Bustling Park Lands reflect a vibrant City. Programs and events should be regularly scheduled in the Park Lands to ensure they remain visually active. Continuing to support and allocate space within the Park Lands for organised sport is an effective way for Council to activate the Park Lands.

Visitor Growth Actions

- *Continue implementing stages of the Park Lands Trail*
- *Remediate and redevelop the land west of Morphett Street Bridge to create the Torrens River Park*
- *Improve the layout, infrastructure and accessibility of Victoria Park for horse racing, motor sports and other events and formal recreation activities*

3.3 Create a safe city

Council's Community Safety Strategy 2003-7 sets the direction for the future of the City of Adelaide as a safe city. While Adelaide is a relatively safe city by world standards, Council recognises that people's perceptions of crime and safety issues can have a significant influence on their decisions to visit, live or establish businesses in the City.

Council encourages and promotes safety in a variety of ways. A range of factors including social changes and emerging issues impact on safety in the City. Council staff work in collaboration with key agencies to develop a clear understanding of crime and safety issues in the City through a range of information-gathering tools, including police intelligence, community complaints about current issues, as well as information obtained through agency and community networks and a rolling program of safety audits. Crime prevention through environmental design techniques are used to conduct audits and develop responses leading to increased perception of safety for residents, workers, students and visitors. Council works with Precinct Groups and the wider community to address worker, resident and trader crime and safety issues.

In 2005, Council revised the Adelaide Liquor Licensing Accord. The Accord is a goodwill agreement, developed collaboratively with stakeholders to facilitate the sharing of intelligence, information and ideas to assist in the local management of liquor-related crime and disorder in and around licensed premises, in particular late night entertainment venues.

A Review of the Precinct Licensing Statements is currently underway. The Statements were developed between 1999 and 2001 in consultation with the local community and licensees. These Statements establish clear guidelines regarding the role of licensed premises in reinforcing the character of the precinct through their hours of operation and standard license conditions. While the Statements are effective in influencing trading hours, noise management, and patron behaviour management when close to the venue, they are not able to effectively address the behaviour of patrons moving between venues, returning to vehicles parked in residential streets or waiting at taxi ranks. Other options are currently being investigated for Council's consideration to effectively address these behaviours:

Smart paths: A series of pedestrian routes providing well-lit and clearly sign-posted routes, managed taxi ranks, CCTV, increased police patrols, access to multi storey car parking, public conveniences and the late night bus service (Wandering Star).

"Late Night Economy" Policy: Development of a late night economy policy to enhance Adelaide as a focal point for arts and sporting events, theatre and other activities and to take the pressure off the licensed venues as the key form of late night entertainment.

Safe dispersal of patrons: The provision of safe and sufficient transport options is a significant factor in reducing alcohol-related violence. Delays in accessing transport can cause frustration resulting in violence. Taxi rank management and the expansion of the Wandering Star late night bus service should increase safe dispersal options from the City.

Visitor Growth Actions

- *Review and improve Council's Safety Strategy to implement a range of new and innovative, pro-active safety strategies*
- *Continue to conduct safety audits and implement actions accordingly*
- *Continue local problem solving with community groups and individuals*
- *Improve safety lighting in local streets, along major thoroughfares and in the Park Lands.*

3.4 Create exciting and interesting public artworks

Council's Public Art Policy 'Watch this Place' identifies that the role of artwork, both historic and contemporary, in city environments has long been recognised as an important part of a city's character. Public art contributes to the heritage and style of the city, supports and expresses cultural life and community aspirations, and promotes the city as a creative and vibrant place, encouraging economic growth and private investment. Council's vision for public art, as expressed in 'Watch this Place', is *Adelaide City's public realm will speak of the city's creativity through a diversity of quality public artworks that engage, please or challenge the viewer.*

Council's Annual Public Art Program delivers exciting and interesting public artworks that contribute to the City's appeal and uniqueness and encourage visitors to stay longer and visit new areas of the City. In visitor terms, the priorities for public art in the City are:

- Locate public art in key visitors nodes that are high profile or attract large numbers of people
- Design public art to engage people and encourage them to interact with the artwork
- Foster boldness and innovation in public art

Visitor Growth Actions

- *Continue to deliver the Annual Public Art Program with an emphasis on installing artworks that will boost the City's visitor experience.*

Talking Our Way Home by Shaun Kerby - at night on the River Torrens



3.5 Build a welcoming City

Amenities in the City, such as signage, play an integral role in making visitors feel welcome. Information that enables people to move around the City in comfort contributes to their sense of place.

It has been identified that signage in the City needs to be improved. The guiding principle for the development of signage is to ensure that a consistent, legible, informative and attractive signage system that is durable and easy to maintain is implemented throughout the City. A range of sign types are required to meet the identified needs of:

- Finding facilities and attractions
- Providing directional and regulatory information
- Providing interpretive information
- Contributing to 'sense of place'
- Welcoming to the City at 'Gateways'

Visitor Growth Actions

- *Continue to implement signage throughout the City and Park Lands that meet the range of information needs for visitors*
- *Prepare precinct maps to enhance awareness of visitor attractions across the City and Park Lands*
- *Produce an Access Map and Directory for visitors with a disability*

4. Travelling to and around the City

4.1 Improve the ease and attractiveness of parking in the City

Adelaide has over 22,000 spaces in public car parks, of which approximately 30% are in well-placed ACC owned and managed car parks. This provides visitor and commuter parking at stable prices for the thousands of daily City visitors. The ACC investment in car park provision was initiated in the 1960s and has continued since then with the most recent development being UPark on Frome Street.

Visitors to the City want to have the convenience of their cars, and the strategy of providing reasonably priced car parks to support people visiting the City by car is therefore expected to apply for the foreseeable future.

Parking comes out clearly as a barrier to increased City visitation in all research conducted on visitors. The cost, convenience and availability of parking are the top reasons for decreasing visitation to the City compared to one year ago, as the key change that would encourage increased visitation to the City and as the biggest disadvantage of spending time in the City for shopping and for leisure. Research has also shown that parking-related issues are a major consideration when deciding whether to shop in the City or suburbs, and in determining attendance at events in the City. There is a perception among City users that parking in the City is expensive, inconvenient and insufficient.

On-street parking spaces are declining in the City as other Council priorities compete for the available kerbside space. This will continue to be the case as alternative transport options, such as cycling and public transport, are provided for and urban design improvements are made to create a model City of the future that people can enjoy.

Therefore, there is a need to make the public more aware of Council car parks, to integrate car park information and management and to make car park systems expandable and flexible. In order to significantly influence the daily visitation number, Council must implement strategies that both change the perception and the reality that it is difficult and expensive to park in the City.

A media campaign dispelling myths regarding parking in the City is the key action proposed in the short-term to increase visitor numbers to the City. The UPark Business Unit has implemented various initiatives to help raise awareness of UParks and to contribute to increasing visitor numbers in the City:

- “You are here” television marketing, targeted at the Rundle Mall precinct and creating a greater awareness of UPark and parking in the City
- “Stay to Late initiative” with a major emphasis on attracting workers and visitors to stay on in the City (charges were significantly reduced as an incentive)
- Extended opening hours and free offerings around the Christmas period
- Free one hour parking at Rundle, Gawler and Frome car parks
- Offering of monthly casual tickets
- Discounts through the Adelaide Residents Card
- Improved service and payment facilities
- Introduction of on-lane booths at the Gawler Place car park
- Introduction of new signage standards at Frome car park
- Improvements in cleanliness and security

Additional strategies are proposed in the Visitor Growth Plan to continue to raise awareness and improve parking in the City.

Visitor Growth Actions

- *Continue a media campaign dispelling myths that parking in the City is costly and difficult*
- *Work with retailers to implement and promote strategies, such as Validated Parking Tickets*
- *Install Real-time Signage, which links UPark systems and shows parking and other activities in the City*
- *Enhance the car park IT management systems to centralise information and control car parks*
- *Increase security in all car parks with the introduction of CCTV with image capturing potential*

4.2 Encourage public transport and cycling to and within the City

Council's goal of significantly increased numbers of visitors by 2010 will require a balanced approach to having a great City in which to be and a variety of quality options to access the City. Council's Integrated Movement Strategy (2000) seeks convenient, reliable and comfortable access by public transport from all parts of metropolitan Adelaide with high quality facilities in the City. South Australia's Draft Transport Plan (2003) proposes to improve the frequency, reliability, safety and quality of public transport services, as well as improve walking and cycling conditions, over the next 15 years.

Public transport plays an important role in supporting the City of Adelaide. Almost half of those living in the Adelaide metropolitan area do not have a licence to drive or access to a car. Improvements to the public transport system represent an opportunity to grow visitor numbers to the City. The State Government has set an ambitious target of doubling the use of public transport to 10% on weekdays by 2018.

Council can assist the State Government to achieve its targets by working through the Strategic Transport Group established by the Capital City Committee to increase patronage to, from and within the City:

- Work with State Government to further improve tram services to and within the City, in particular by ensuring that the proposed extension is delivered to an appropriate standard for a Capital City and by encouraging further extension of the tram service
- Work with State Government to improve existing stop facilities (design, legibility, safety and information)
- Work with State Government to improve accessibility (through more services and frequency) in particular to those metropolitan areas currently not well serviced by bus or train services
- Continue and improve bus services to special events

Council's Connector Bus Service also provides an added level of accessibility within the City. It is a popular service that connects various precincts of the City and fulfils an important need to elderly and infirm residents in particular.

With the introduction of both the Adelaide City Strategic Bicycle Plan (1995) and the State Government Cycling Strategy (1996), cycling trips began increasing and are now approaching a 10 year high.

Strategies are required to further develop a city renowned for its culture of welcoming cyclists and providing safe and accessible cycling environments that take account of the needs of cyclists of all abilities. The strategies to achieve this vision are identified in the Integrated Movement Strategy (2000):

- Create and maintain an integrated bicycle network – complete City Bicycle Loop and Park lands Recreation Trail
- Provide appropriate bicycle parking
- Encourage provision of trip end facilities as an integrated component of significant new commercial developments
- Provide signage throughout the bicycle network
- Increase opportunities for intermodal transport
- Manage traffic conditions for greater cyclist safety and reduce cyclist black spots
- Promote cycling in the City with the Free City Bikes Scheme and targeted marketing programs

Visitor Growth Actions

- *Support the implementation of the Glenelg Tramway Extension*
- *Work with State Government to improve existing bus stop facilities*
- *Lobby the State Government to provide additional bus and train services to the City*
- *Lobby the State Government to provide free intra-City public transport*
- *Maintain the Connector Bus Service and investigate options to improve the service*
- *Facilitate continued bus services to special events in the City*
- *Promote and extend Free City Bikes Scheme*
- *Complete bicycle path linkages with the City's adjoining councils*



Adelaide: a city that welcomes cyclists

4.3 Improve intra and interstate transport facilities

The Council-owned interstate and country bus terminal on Franklin Street was built some 35 years ago. The current facilities are outdated and in need of improvement. Council has commenced the process of developing a state-of-the-art terminus between Franklin and Grote Streets.

The bus terminal is a key piece of infrastructure facilitating interstate and overseas travellers (i.e. backpackers), regional services for rural South Australia (i.e. Eyre/Yorke Peninsulas, Mid-North and Barossa) and day tour operations for special interest site seeing. Over 300,000 passengers pass through the existing facility annually. Development of new infrastructure will support these needs.

There is a relationship between the bus terminal, tourism and backpackers with various backpacker facilities established in close proximity to the bus terminal.

The new bus terminal will comprise 15 bus bays, passenger lounge, ancillary retail/facilities, a freight facility, a passenger drop-off area from a realigned Bowen Street and associated public realm improvements. With construction commencement scheduled for April 2006, the project is anticipated to be completed in September 2007.

Inter and intra-state travel is also facilitated by the Keswick Railway Station. Council will continue to influence better servicing of passengers from Keswick to the City. According to surveys undertaken by the Public Transport Division of the Department of Transport, Energy and Infrastructure, the Skylink bus service, which transports people from the airport to the City, captures around 31,000 passengers, confirming its value as an airport/city link. To provide improved information for tourists visiting the City, the Capital City Committee is installing directional signage at the Keswick Railway Station as part of the long-term Gateway Signage strategy.

Visitor Growth Actions

- *Complete the new Grote Street Bus Station*
- *Support continued improvement in city/airport connections*
- *Continue to provide a City presence at the airport via suitable information, Ask About Adelaide volunteers, and liaison with tourism bodies and service providers*

Visitor Growth Plan 2006-10

Measures of Progress

Table for measures of progress

Key measure	Update frequency	Source	Description
Rundle Mall movement counts	Quarterly	Rundle Mall pedestrian counters	Counters provide on-going data on the number of times the counter is passed.

Supporting measures	Update frequency	Source	Description
Estimated annual average daily visitor numbers	Quarterly	Metropolitan household omnibus surveys	Perceived frequency of City visitation among the metropolitan population
Main purpose of visiting the City (excluding those in for work or study)	Annually	Adelaide City Users Segmentation Study	On-street surveys give proportional breakdown of reasons for being in the City.
Average length of stay of day visitors to the City - both visitors and those in for work or study.	Annually	Adelaide City Users Segmentation Study	City users are asked the time of arrival and departure for each day they visited the City in the previous week.
Average spend of visitors per visit to the City - both visitors and those in for work or study.	Annually	Adelaide City Users Segmentation Study	City users are asked the amount spent for each day they visited the City in the previous week.
Central Market movement counts	Quarterly	Central Market pedestrian counters	Counters provide on-going data on the number of times the counter is passed.
Perceptions of people aged 15-30 of the City as an attractive and exciting place for leisure	Annually	ACC Customer Satisfaction Survey	Residents, workers, students and visitors are asked to rate Council's performance in this area.
Visitation to cultural institutions, events and conferences in the City	Quarterly	Combination of sources such as the institutions, SATC and ACTA	Information is provided based on various sources such as ticket sales, pedestrian counters and bookings.
Percentage of shopping and leisure trips to the City made by public transport	Annually	Adelaide City Users Segmentation Study	Self-reported travel patterns for people visiting the City for shopping and for leisure.
Occupancy rates for short stay accommodation	Quarterly	ABS - Tourist Accommodation, SA	Provides number of rooms, occupancy rates and number of overnight visitors
Level of multi-activity trips	Annually	Adelaide City Users Segmentation Study	Incidence of people undertaking other (secondary) activities while in the City.
Frequency of metropolitan residents visiting the Park Lands	Quarterly	Metropolitan household omnibus surveys	Frequency of visitation to Park Lands among the metropolitan population - used to estimate daily visitor numbers.

References

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- Adelaide City Users Segmentation Study 2005*, Adelaide City Council (December 2005)
- Visitor Target Survey #1*, Truscott Research (December 2003)
- Household Omnibus Surveys*, McGregor Tan Research (various monthly reports titled "City Visitation Research" October 2004 to January 2006 and ongoing).
- City Visitation Research Segmentation Study 2005*, Colmar Brunton Research (December 2005)
- Rundle Mall Retail Profile for Rundle Mall Management*, Alistair Tutte (May 2003)
- Analysis of the Retail Sector in the City of Adelaide*, Urbis JHD (December 2005)
- Public Spaces and Public Life City of Adelaide 2002*, Prof Jan Gehl (2002)
- Public Realm Investment Economic/Visitor Impact Assessment*, MacroPlan Aust. (August 2005)
- Retail Mix of Rundle Mall Consultancy Report*, Jones Lang LaSalle (August 2005)
- Various Visitor Growth Plan Background Papers prepared internally in 2005/2006:
- Analysis – City Visitor Numbers and City Retailing Trends (Sept 2005)
 - Improving Accessibility for City Visitors (Oct 2005)
 - UPark Operations (Oct 2005)
 - Electronic Display Technology (Nov 2005)
 - Learnings from the Early Sessions Pilot (Nov 2005)
 - Report on 'Places for People Melbourne 2004' (Nov 2005)
 - Profile of 10km City Catchment Area (from Rundle Mall) (Jan 2006)
 - Tourism in the City (Jan 2006)
 - Use of Squares and Park Lands for Community Events (Jan 2006)
- Visitation to Major Attractions and Events in South Australia – 2004/2005 Edition*, South Australian Tourism Commission (September 2005)

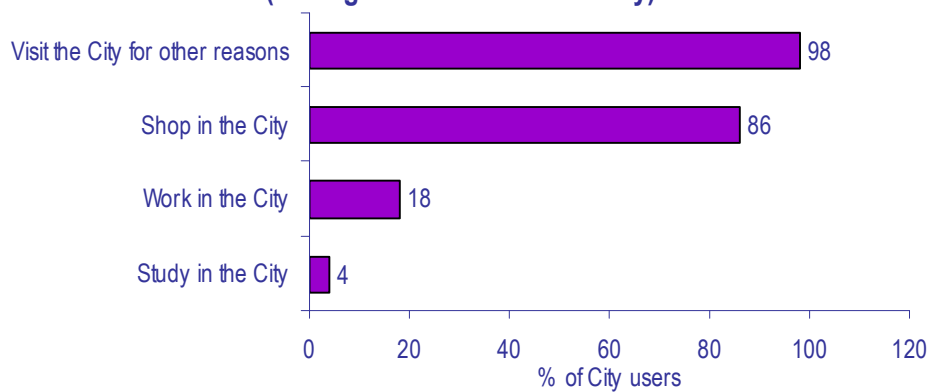
APPENDICES

The Visitor Profile

A lot of research is conducted and sourced by Adelaide City Council on its visitor population. This section provides a more detailed profile of the different population groups that contribute to the City's visitor activities - such as metropolitan residents, City workers and students and tourists from Intrastate, Interstate and overseas. It also provides profiles of specific sub-groups such as young people and those in family households.

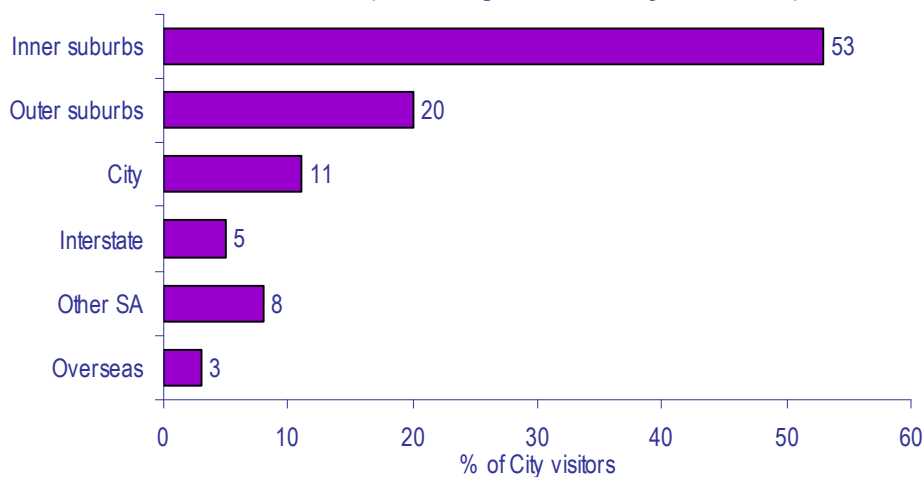
The majority of City visitors come from metropolitan Adelaide and mostly from the inner 10km area around the City. Metropolitan residents who use the City, do so for multiple and varied purposes such as shopping, leisure, work and study.

CITY USE AMONG THE METROPOLITAN POPULATION
(among those who use the City)



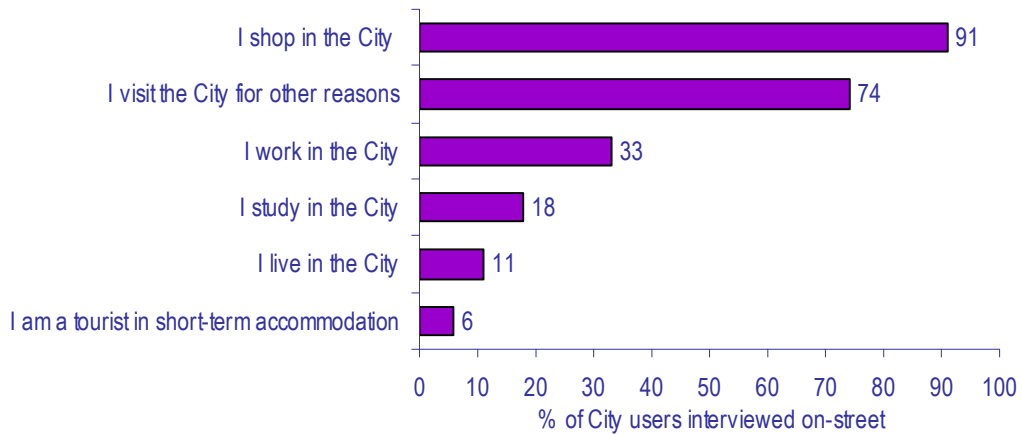
On-street surveys for the Council's 2005 City User Segmentation Study (excluding people primarily in the City for work) found that 73% of people had come into the City from suburban Adelaide, 11% lived in the City, 13% had come in from the country or inter-state and 3% were overseas visitors.

HOME POSTCODES (excluding those mainly in to work)



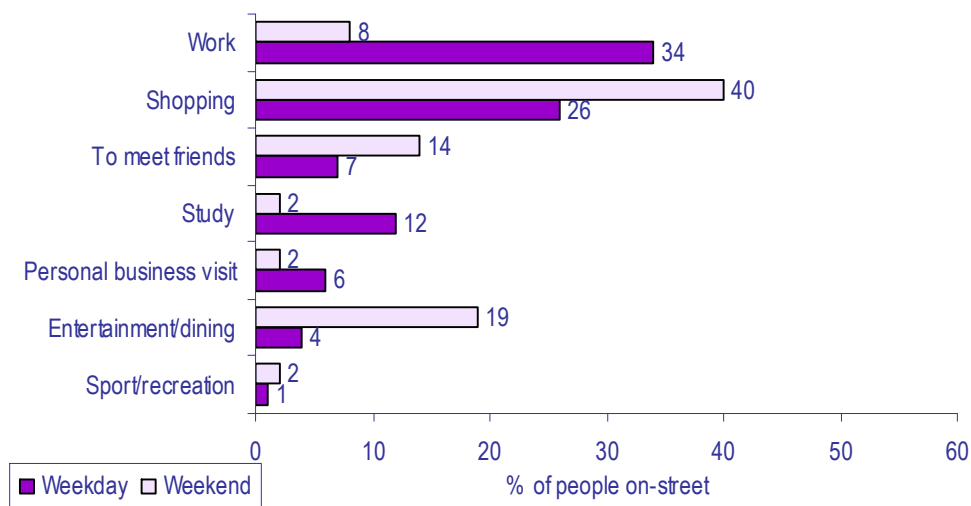
The on-street surveys provided an insight to the types of City uses among those who were in the City over the course of a typical week:

TYPES OF CITY USE AMONG THOSE ON-STREET IN THE CITY



The on-street surveys also gave an insight into the reasons that people were in the City, regardless of their overall uses of the City:

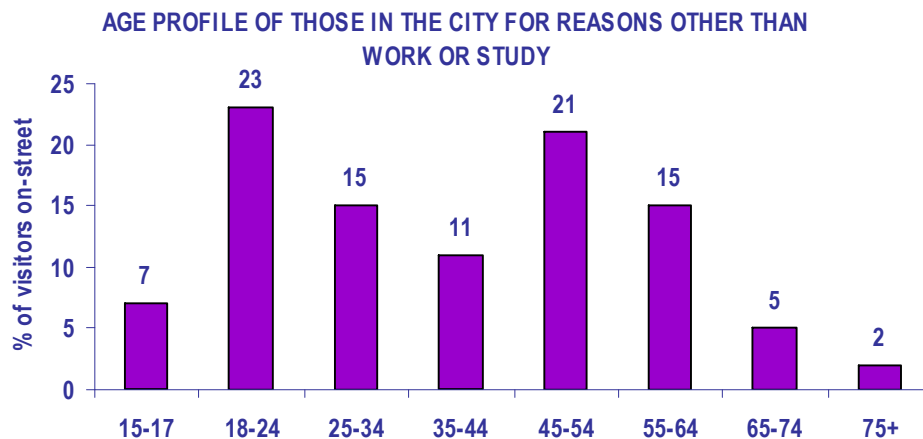
MAIN REASON FOR BEING IN THE CITY



A research study conducted by Professor David Yencken for the City commented that “an initial test of the vitality of a city centre is to find out to what degree it depends on those who are working in the city to support its retail, entertainment and cultural facilities. A lively city attracts people directly for these activities; a dead city relies significantly on those who have to be there for work or other reasons”.¹⁵ This survey reported that for 1994 and 1996 no more than 37% of City users surveyed on-street on weekdays were there for work. The Council’s City User Segmentation Study conducted in 2005 found 34% of those surveyed on-street during the week were there for work. These are relatively healthy findings.

We can see from the graph below that young people aged 18-24 are the largest age groups of visitors in the City, and the 45-54 age group are also a significant proportion.

¹⁵ Yencken, David 1997, How People Perceive and Use the Adelaide City Centre, 1994 and 1996. p ii



Shopping in the City

Shopping is clearly a primary draw-card to the City with 77% of the metropolitan population shopping in the City at least once a year, and 31% shopping in the City at least monthly. 10% shop weekly in the City. Additionally, almost half of those in the City on weekend days are there mainly to shop.

Shoppers are 61% female with 58% aged less than 45 years and 91% are aged less than 65 years. 37% come to the City mainly for shopping at least once per week, and 68% at least once per month. More than half visit the City for shopping on Friday or Saturday. Two thirds of shoppers do other things whilst in the City for shopping; most patronise cafes or meet friends for lunch or coffee. 37% of those in the City for shopping travel to the City by car including 8% who are car passengers. One quarter catch public transport - most of these shoppers catch the bus.

The main benefits of the City as a shopping destination are perceived to be the range of shops available as well as the convenience of having shops in close proximity and being able to walk between various shops, dining facilities and entertainment. Another advantage is that particular shops are available in the City that are not available elsewhere. The main detractors from shopping in the City are based around perceptions of parking with cost and availability being the main issues.

Leisure in the City

Leisure and entertainment are also important attractors to the City with 77% of the population visiting the City for leisure and entertainment. 33% visit the City at least monthly for leisure and entertainment, and 10% at least weekly. During the week; 4% of those in the City are there for leisure or entertainment. On the weekend, this proportion increases to 19%.

Those using the City for leisure have a slight skew to males and tend to be younger with 60% being 35 years or younger. More than half live in the inner 10kms of the City. Three quarters of these City users do other things while they are in the City for social/entertainment reasons such as shopping, patronising cafes and meeting friends for lunch or coffee in addition to their primary reason. Half of these City users travel to the City by car including 13% who travel as car passengers; catching the bus is the other main method

The main advantages of the City for leisure and entertainment are the range and variety of arts and cultural facilities, the quality of the facilities and also of restaurants and cafes. The lively, busy atmosphere in the City also attracts people for leisure and entertainment. The main detractor from using the City for entertainment is the cost of parking. Others say that they would use the City for entertainment more, if there were more happening in the City.

Personal business and services in the City

Another reason for visitors to use the City is to access personal services or to conduct personal business. There is a slight female skew among this group and it tends to be older

Visitor Growth Plan 2006-2010

with 55% being over 55 years old. Both of these factors are influenced by older people accessing medical services in the City.

In terms of frequency of visiting, half come into the City to access personal or business services at least weekly and 80% at least monthly. The vast majority of these visitors are in the City during the week with just 5% on the weekend.

Three quarters of these visitors also use the City for other reasons whilst there including shopping, patronising cafes and meeting friends for lunch. 42% travel to the City by car including 5% who travel as passengers.

Tourism in the City

As visitor numbers are calculated as average daily visitors, the frequency of visiting is the main consideration. This accurately reflects the "vibrancy" of the City but is not heavily influenced by the number of tourists visiting the City as they are infrequent visitors. However, tourists are a valuable source of economic gain, vibrancy and diversity in the daily population.

The on-street component of the Adelaide City Users Segmentation Study 2005 showed that 6% of people in the City are staying in short-term accommodation (and hence are classified as tourists). Mostly tourists come from outside the metropolitan area with 57% from interstate and 27% from overseas. The rest are from within South Australia.

42% of tourists were shopping in the City. Other reasons for being in the City were to meet friends, for leisure and entertainment reasons, or for personal business.

Visitors to the City from Other SA

Most South Australian Tourism Commission data (SATC) relates to visitors to regional Adelaide (i.e. the whole metropolitan area). Negotiations are currently underway to gain more specific information on the Adelaide LGA.

Information relating to the Adelaide region indicates that for 2003 Adelaide received 544,000 intrastate visitors for holiday and leisure and 265,000 intrastate visitors for business or education reasons. Visitors from regional SA constitute 36% of all domestic holiday visitors to the Adelaide region. The following table shows the proportional distribution of the origins of these visitors:

Limestone Coast	7%	Yorke Peninsula	3%
Eyre Peninsula	5%	Barossa	3%
Flinders Ranges	5%	Fleurieu Peninsula	2%
Riverland	4%	Other regions	6%
	TOTAL OTHER SA	36%	

For those visitors from regional SA who were captured in on-street surveys, the main reasons for being in the City on that day, are for shopping (33%), work related (16%); personal business visits (such as accessing personal services or hospital) (13%) and meeting friends (11%).

Workers as visitors

Those who are in the City mainly for work also use the City for other purposes while they are there. Shopping and frequenting cafes are the main other activities undertaken by those primarily in for work during the week. On Saturdays frequenting nightclubs and meeting friends for a drink are undertaken after work. However the majority had 'no other reason' for being in the City. This suggests that workers could be targeted to increase their uses of the City while there.

One fifth of workers interviewed were in the City on the weekend, making them a group that could be encouraged to use the City more, especially on weekends.

Students as visitors

Students account for about 15% of people in the City during the week with 43% of students being there mainly for study. A further 30% are there for work or shopping. The majority of students who are mainly in the City for study also undertake other activities such as shopping and socialising.

Students also account for 21% of those in the City on weekends, with main reasons being shopping and socialising. One third of students interviewed were in the City on the weekend, making them another group that could be encouraged to use the City more, especially on weekends.

Young People

People aged 15-24 account for approximately one third of those in the City on a given day; half are younger than 35 years. Young people tend to be fairly frequent visitors to the City with 45% visiting the City at least weekly. The main reasons for young people being in the City is for study or shopping with a lot also socialising and frequenting cafes while they are there.

Young people see the main benefits of shopping in the City as the range of shops and the ease of getting around. Young people could be encouraged to shop in the City more by providing more and/or cheaper parking and providing a greater range of shops. In terms of using the City for leisure, young people are more focussed on the social aspects of the City as a central meeting place for people. Young people particularly like Rundle Mall and Rundle Street and enjoy the closeness and convenience of everything in the City. Encouraging more use of the City for leisure among young people will need to focus on providing cheaper parking and having more happening in the City.

Families with Children

93% of metropolitan residents in households with teenaged or younger children (that use the City) visit the City for shopping and 98% for leisure or entertainment. However, visiting for these reasons tends to be infrequent with 64% visiting for each reason monthly or less often. Therefore, families constitute an important target for increasing the vibrancy of the City through more frequent use among those who already use the City occasionally.

The main attractors for shopping among those in family households are the good range of shops in the City, that particular shops are located there and the close proximity of shops making it easy to get around. The main attractors for spending leisure time in the City are the range and variety of arts and cultural facilities and the quality of restaurants. The main elements to encouraging more shopping and leisure time in the City among these families is in reducing the cost of parking and in providing more, and more convenient, parking.

Accessing the City

Overall, just under half of those coming into the City travel by car, with the majority of these travelling as the driver, rather than the passenger. Public transport is used by two fifths of those travelling to the City, mainly by bus. Incidence of walking is quite high at 17% although this includes people who are already in the City such as residents and those staying in short-term accommodation.

In terms of reasons for visiting the City, the incidence of travelling to the City by public transport (particularly by bus) is lowest among those coming for leisure and entertainment. 29% of those coming to the City primarily for shopping drive to the City, a further 14% travel as car passengers.

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The main method of accessing the City among young people (those aged 15-24 years) is by bus (42%). 34% of young people travel to the City by car, and have the lowest incidence of driving to the City (16%).

City Non-users

Non-users of the City, defined as those who use the City less often than once a year, were interviewed as part of the telephone survey component of the Adelaide City Users Segmentation Study 2003. The survey identified that non-users tend to be older compared to City users. 65% of non-users are 55 and over. Given the aging population, making specific efforts to attract older people to the City could present a good opportunity for increasing City visitation.

While the majority of non-users indicated that 'nothing would encourage them' to use the City more for leisure (66%), the remaining 35% could therefore be encouraged to use the City for leisure should their requirements be met. 10% of non-users indicated factors relating to parking – cheaper parking, easier parking, more on-street parking. 3% of non-users identified that cheap/free entertainment would encourage their use of the City.

VISITOR GROWTH PLAN ACTIONS								
Key Activities	Actions	Rating	Year 05/06 (Net)	Year 06/07 (Net)	Year 07/08 (Net)	Year 08/09 (Net)	Year 09/10 (Net)	Comment
1. ACTIVATING THE CITY								
1.1 (A) Conduct programs and events that activate the City	Major Events/Activities Sponsorship Program	H	\$1,000k	\$1,000k	\$1,000k	\$100k	\$1,000k	(OP) Continue to support the attraction of major events into Adelaide City.
	Street Markets	H	\$100k	\$400k	\$300k	\$300k	\$300k	(OP) Weekly street market conducted year round in the East End.
	Busking Festival	H	\$150k	\$120k	\$150k	\$150k	\$150k	(OP) Continue partnership with the Fringe to deliver an annual international Busking Festival.
	Council's signature civic events	M	\$334k	\$313k	\$313k	\$313k	\$313k	(OP) Continue signature events such as Lord Mayor's New Years Eve Party, Australia Day and ANZAC Day events.
	North Terrace Activity Program	M	\$100k	\$100k	\$100k	\$100k	\$100k	(OP) Continue partnership with the SA Museum to deliver regular activity on North Terrace.
	Christmas in the City	M	\$204k	\$362k	\$362k	\$362k	\$362k	(OP) Featuring Lighting the Christmas Tree event and precinct-specific promotions. Funding increase to cover replacement of tree and decorations.

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	Music in the Squares	L	\$100k	\$100k	\$100k	\$100k		(OP) Continue partnership with the Fringe to deliver events in City Squares and Park Lands.
	Park Lands Week and ongoing activities	L		\$5k	\$50k	\$30k	\$30k	(OP) Deliver a program in liaison with a (possible) state-wide Park Lands Week incorporating 'Healthy Parks Healthy People' initiatives.
	Balanced program of events, festivals and conventions			\$5k	\$5k	\$5k	\$5k	(OB) Budget represents staff time to support the South Australian Tourism Commission objectives to develop a balanced program of events, festivals and conventions
1.2 (A) Develop visitor attractions in the City	Strengthen Rundle Mall retail and tenancy mix	H	\$5k	\$5k	\$5k	\$5k	\$5k	(OB) Budget represents staff time to facilitate result (eg cafes/restaurants open for dinner, microbrewery, discount department store, lifestyle (homewares) retailers).
	Install Electronic Display Technology	H	\$5k	\$100k	\$90k	\$90k	\$90k	(OP) 1. Develop policy and operating guidelines for Electronic Display Technology in the public realm (purpose, locations, content etc.) 2. Develop and implement content of Times Square Rundle Convergence (see next action).
	"Times Square" LED Screen - Rundle Convergence	H	\$5k	\$1,500k				(CW) Screen will host up-to-date information on services, facilities, promote events and activities and showcase art, film etc.
	Facilitate a Panorama Observation Area at Santos building	H		\$10k				(OB) Budget represents staff time to facilitate result

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	Complete Hindmarsh Square Interactive Science/Learning Playspace	H	\$190k	\$300k	\$200k			(CW*) Construction of this unique sculptural playspace in the NW quadrant of Hindmarsh Square to commence in 05/06.
	Facilitate the development of a ten-pin bowling facility in the City	M		\$5k	\$5k			(OB) Budget represents staff time to facilitate result
	Facilitate the development of a cinema complex in Rundle Mall	M		\$20k	\$10k	\$10k	\$10k	(OB) Budget represents staff time to facilitate result. Project to be scoped during 06/07
	Strengthen the City's Aboriginal cultural attractions	M			\$50k	\$30k		(OP) Develop an Aboriginal Tourism Strategy, in partnership with SATC and Aboriginal stakeholders, to improve the City's Aboriginal cultural attractions.
1.3 (A) Establish infrastructure and processes that support events and activity	Upgrade the Riverbank precinct and create a major events' area	M	\$150k		\$900k	\$600k		(CW*) Implement the Elder Park Masterplan
	Remove barriers that discourage community groups from conducting events in the City	M		\$15k	\$10k	\$10k	\$5k	(OB) Review Council processes, fees and requirements, to remove barriers to conducting events in the Squares and Park Lands.
	Create a City event cost subsidy program for ACC venues	M			\$10k	\$10k	\$10k	(OP) Subject to outcomes of the review of barriers to community groups conducting events in the City, examine subsidies toward the cost of hiring infrastructure and Council facilities
	Install event infrastructure in Squares and Park Lands	M	\$80k	\$200k		\$200k	\$200k	(CW) Increase use of Squares and Park Lands through installation of power and water.

	Major Upgrade of Victoria Square	L				\$250k	\$250k	(CW*) Redevelop Victoria Square as the City's premier civic event site
	Continue negotiations for the redevelopment of Victoria Park as a major events park	L	\$5k	\$5k	\$5k			(CW*) Improve the layout, infrastructure and accessibility of Victoria Park for events and formal recreation activities. Major redevelopment subject to SA Jockey Club and State Govt partnership.
	Digital movement counters				\$20k			(OP) New counters for a range of areas covering different activities, including North Terrace
SUB-TOTAL			\$2,428k	\$4,565k	\$3,595k	\$2,575k	\$2,740k	
2. INVITING TO THE CITY								
2.1 (A) Promote the City to metropolitan residents	Continue the Integrated Marketing Campaign, including destination marketing (You Are Here)	H	\$790k	\$650k	\$630k	\$610k	\$600k	(OP) Implement Stage 3 of the Campaign in 06/07 incorporating targeted campaigns and market research.
	Continue the UPark Marketing Campaign	H	\$150k	\$150k	\$150k	\$150k	\$150k	(OP) (see budget above) Incorporates Validated Parking strategy and increase in off-street short term parking
	Continue to implement the Rundle Mall Marketing Program	H						(OP) \$1.5m funding provided by the Rundle Mall traders as part of a levy
	Conduct a targeted on-line youth marketing strategy	M			\$40k	\$40k	\$40k	(OP) Implement key actions of the Youth Policy: Redevelopment of Council's Youth Web-site and Adelaide City Youth Event Calendar - electronic promotion of the City to young people investigating the use of email & mobile phone technology.

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	Conduct a destination Marketing Campaign for the Park Lands and Squares	L			\$30k	\$20k	\$20k	(OB) Promote the icon status of the Park Lands with, for example, publications that promote the Park Lands as a visitor destination
2.2 (A) Promote the City to national and international visitors	Develop a partnership between SATC and Council for an integrated brand destination marketing campaign for the State promoting the City Wine & Food Experience, the Arts and Entertainment and History and Heritage.	H		\$70k	\$70k	\$70k	\$70k	(OB) Position the City as the central point where world class wining and dining and entertainment come together. Budget includes staff resources and collatoral eg brochures etc. Also consider a Disability Tourism Strategy.
	Liase with the SATC with a view to jointly developing a Tourism Strategy for the City			\$10k				(OB) Budget represents staff time for liaison with the South Australian Tourism Commission
	Continue to fund Adelaide Convention Tourism Authority (ACTA) and Adelaide Tourism Marketing (ATM)	M	\$260k	\$260k	\$260k	\$260k	\$260k	(OP) To assist in the delivery of specific convention outcomes for the City.
SUB-TOTAL			\$1,200k	\$1,140k	\$1,180k	\$1,150k	\$1,140k	
3. BUILDING THE CITY								
3.1 (A) Create a vibrant and exciting public realm that attracts shoppers and	Upgrade Rundle Mall	H	\$400k	\$500k		\$250k	\$250k	(CW*) Implement the Rundle Mall Masterplan, including development of dining facility

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other visitors	Upgrade North Terrace	H	\$4,800k	\$900k				(CW*) Complete the upgrade of this major boulevard.
	Upgrade Central Market Environs	H	\$462k	\$200k	\$200k	\$250k	\$250k	(CW*) Internal and external upgrade to maintain high visitor numbers.
	Upgrade minor streets and laneways in the City	H	\$100k				\$450k	(CW) Commence with lanes in the vicinity of Rundle Mall or station to Central Market link
3.2 Make improvements to the Park Lands	Park Lands Trail	M	\$300k	\$300k	\$300k	\$300k	\$300k	(CW*) Continue implementing stages of the Park Lands Trail. Incorporates West Terrace Cemetery Tourist Trail as stage of Park Lands Trail
	Torrens River Park (land west of Morphett Street Bridge)	M	\$70k	\$80k				(CW*) Develop a Masterplan and remediate and redevelop a lineated Park Land as an attractive event park.
3.3 (A) Create a safe City	Conduct safety audits and implement actions accordingly	H	\$10k	\$10k	\$10k	\$10k	\$10k	(OB) Safety audits conducted in response to community feedback.
	Review and improve Council's Safety Strategy	H		\$20k				(OB) An updated strategic approach to safety in the City addressing essential safety initiatives and identifying areas where Council can be proactive in addressing crime and safety in the City.
	Continue local problem solving with community groups and individuals	H	\$30k	\$30k	\$30k	\$30k	\$30k	(OB) Provision of advice and problem solving in response to safety issues.
	Improve Parklands safety lighting	M	\$60k		\$60k	\$60k		(CW) Installation of lighting around paths and near public toilets.
	City lighting renewal	M	\$310k	\$1,400k	\$1,400k	\$1,400k	\$1,400k	(CW) Includes an allocation of \$210k for local street lighting improvements.

3.4 (A) Create exciting and interesting public artworks	Deliver the Annual Public Art Program	M	\$330k	\$330k	\$330k	\$330k	\$330k	(CW*)(OP) Includes Councillor initiated works of art (\$100k), and Annual Public Art Plan (\$230k), including public art grants.
3.5 (A) Build a welcoming City	Produce an Access Map and Directory for visitors with a disability	M		\$10k		\$10k		(OP) Revise the City Access Map and Directory (hard copy and on-line) as an easy guide to accessible businesses, restaurants, car parks, attractions etc.
	Prepare Precinct Maps	M		\$17k				(OP) Prepare maps to enhance awareness of visitor attractions across the City and Park Lands.
	Implement signage strategy	M	\$50k		\$150k	\$150k	\$150k	(CW) Continue construction of corporate signage, add gateway signage (Welcome to Adelaide signage)
SUB-TOTAL			\$6,922k	\$3,787k	\$2,480k	\$2,780k	\$3,170k	
4. TRAVELLING TO AND AROUND THE CITY								
4.1 (A) Improve the ease and attractiveness of parking in the City	Continue the UPark Marketing Campaign	H						(See Inviting to the City) Includes working with retailers to implement strategies such as Validated Parking Tickets.
	Install Real-time Signage	M					\$600k	(CW*) Linked to Upark systems showing parking and other activities in the City
	Stage 2 Palais carpark redevelopment	M			\$150k			(CW*) Linked to Upark systems showing parking and other activities in the City

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4.2 (A) Encourage public transport and cycling to and within the City	Lobby State Govt to provide free intra-City public transport	H		\$5k				(OB) In addition to the existing free city buses, as per Perth city public transport system. Budget represents staff time to facilitate result
	Support the implementation of the Glenelg Tramway Extension	M	\$5k	\$5k				(OB) Budget represents staff time to facilitate result
	Lobby the State Government to improve public transport services and infrastructure to and within the City	M		\$5k	\$5k	\$5k	\$5k	(OB) Lobby for the provision of additional bus and train services and continued special event public transport services.
	Maintain the Connector Bus Service and investigate options to improve the service			\$380k	\$420k	\$430k	\$440k	(OP) Budget incorporates provision of the existing service.
	Promote and extend Free City Bikes Scheme	M	\$70k	\$70k	\$70k	\$70k	\$70k	(OP) Introduction of 5 nodes within the CBD facilitating free bikes (200) available to all
4.3 (A) Improve intra and interstate transport facilities	Bus Station/carpark building project and plaza	M	\$2,000k	\$19,000k				(CW*) Design and construction of new bus terminal, 640 space public car park and public plaza area.
SUB-TOTAL			\$2,075k	\$19,465k	\$645k	\$505k	\$1,115k	
TOTAL			\$12,625k	\$28,957k	\$7,900k	\$7,010k	\$8,165k	

Appendix 3

Supporting Initiatives

'Supporting initiatives' do not have a measurable effect on visitor growth. They have a cumulative, incremental effect and are recognised as being important contributors to maintaining visitor numbers and ultimately achieving the visitor population target. 'Supporting Initiatives' are not included in the Visitor Growth Plan but are tabled in this Appendix.

The implementation of current Council policies and strategies also play a supporting role in generating visitors.

In September 2001 Council endorsed the **Recreation and Sport Plan, *Light'n Up in Adelaide***, in recognition of the contribution that recreation and sport make to the economic, cultural and social wellbeing of the City. The achievements to date of *Light'n Up in Adelaide* can be seen in a number of major initiatives that have attracted additional visitors to the City:

- the establishment of the City Skate Park
- the creation of recreation hubs at Pityarilla (19) and Nanto Womma (6) featuring unique and attractive playgrounds
- the redevelopment of the BMX Track

Light'n Up in Adelaide continues to promote the provision of recreation and sport in the City and provides direction on recreation programs, promotion and facility improvements.

Through the implementation of the **City Arts and Living Culture Strategy 2003-2007**, Council is gaining a well-respected arts and culture profile. Increasingly the important role that arts and culture activity plays in creating a livable and attractive City is being recognised. Arts and culture activity generates the 'buzz' that successful vibrant Cities strive for.

The **Youth Policy and Action Plan 2004-2008** 'The Time of Your Life' is designed to support the creation of a vibrant and dynamic City life that actively engages young people. The policy provides opportunities and offers choices that entice young people to participate in City life. One of the key policy statements targets young visitors. 'Council will continue to improve access for all young people including visitors by providing support services, recreation, cultural and entertainment options.

VISITOR GROWTH PLAN ACTIONS - SUPPORTING INITIATIVES								
Key Actions	Activities	Rating	Year 05/06	Year 06/07	Year 07/08	Year 08/09	Year 09/10	Comment
1. ACTIVATING THE CITY								
1.2 (SI) Develop visitor attractions in the City	Upgrade Golf Links	S		\$200k	\$200k	\$200k	\$200k	Refurbish Golf Club to create social hub for golfers and local community.
	Upgrade Adelaide Aquatic Centre	S	\$556k	\$190k				(CW) Asset maintenance and improved facilities to attract and increase City visitation
SUB-TOTAL			\$556k	\$390k	\$200k	\$200k	\$200k	
2. INVITING TO THE CITY								
2.2 (SI) Promote the City to national and international visitors	Install webcams at the top of the Santos building	S			\$50k	\$10k	\$10k	(CW) To be considered following review of the webcams at key city sites (05/06 initiative)
SUB-TOTAL					\$50k	\$10k	\$10k	

3. BUILDING THE CITY								
3.1 (SI) Create a vibrant and exciting public realm that attracts shoppers and other visitors	Complete the Pulteney Street Upgrade from Grenfell Street to North Terrace	S		\$1,500k	\$2,100k			(CW*)
3.2 (SI) Make improvements to the Park Lands	Redevelop playspaces in the Park Lands	S	\$40k	\$40k	\$40k	\$40k	\$40k	(CW) 06/08 Glover Park (20), 07/08 Rymill Park (14), 08/09 Bonython Park (27), 09/10 Park 10 North Adelaide
	Frome Park development	S	\$650k	\$200k				(CW*) Create the former RAH carpark as a unique 'sustainable' park.
3.3 (SI) Create a safe City	Improve the CCTV surveillance system in the City	S	\$30k	\$70k	\$60k	\$60k	\$60k	(CW)
	Remove or upgrade public conveniences	S	\$650k	\$200k		\$200k		(CW) An updated strategic approach to safety in the City that will address essential safety initiatives and identify areas where Council can be proactive in addressing crime and safety issues in the City.
3.5 (SI) Build a welcoming City	Implement projects of the Lighting Policy	S	\$180k		\$200k	\$250k	\$250k	

	Building façade lighting (micro)								
	Special event luminations								
SUB-TOTAL			\$1,550k	\$2,010k	\$2,400k	\$550k	\$350k		
4. TRAVELLING TO AND AROUND THE CITY									
4.1 (SI) Improve the ease and attractiveness of parking in the City	Ongoing review U-Park to deliver improvements and efficiencies	S	\$5k	\$5k	\$5k	\$5k	\$5k	(OB) Review of pricing strategy to attract shoppers, visitors and commuters into City carparks.	
4.2 (SI) Encourage public transport and cycling to and within the City	Work with State Govt to improve existing stop facilities	S	\$5k	\$5k	\$5k	\$5k	\$5k	(OB) Budget represents staff time to facilitate result	
	Lobby State Govt to implement policies which support City visitation in relation to suburban sprawl	S		\$5k				(OB) Budget represents staff time to facilitate result	
4.3 (SI) Improve intra and interstate transport facilities	Explore options to improve connection between Keswick Railway Station and the City	S	\$5k	\$5k				(OB) Budget represents staff time to facilitate result	
SUB-TOTAL			\$15k	\$20k	\$10k	\$10k	\$10k		
TOTAL			\$2,121k	\$2,420k	\$2,660k	\$770k	\$570k		

Impact on Visitor Growth Target

1. Activating the City

Activating the City Program – 175,000 per annum/500 per day

Figure based on the following estimates per each program component:

- North Terrace Activity Program – 50 programs weekly, 200 participants per program – total 10,000 visitors per annum/30 per day
- Street Markets – 3000 per week/ 150,000 per annum/ 400 per day.
- Squares Alive – 3 musical events in 3 squares - 1000 each – total 9,000 visitors per annum/25 per day.
- Busking Festival – 6,000 in play-offs in Rundle Mall and Final in Rundle Street – total 6,000 visitors per annum/20 per day.

Hindmarsh Square Interactive Playspace – 36,500 per annum / 100 per day

Figure based on the following estimates on average Skate Park and BMX Track figures – 36,500 per annum

'Times Square' Electronic Display Technology – 18,250 per annum/ 50/day

Figure based on anecdotal expectation that Times Square will be a meeting place for young people. Annual 20% increase per annum.

2. Inviting to the City

Interactive Marketing Campaign – average 5000 per day

Based on an accumulative 5% increase in visitor numbers over the next 3 years.

3. Building the City

Major Developments

North Terrace Upgrade - 400,000 per annum/ 1000 per day

Figure represents a 25% increase (across 4 years) in attendance figures at Art Galley, Migrant Museum, SA Museum and State Library.

- Bus Station Public Realm – 18,000 per annum / 50 per day
Figure based on 50 visitors to open space per day, including workers at lunchtime.
- Bus Station/Carpark – 125,000 per annum /350 per day
Figure based on SKM consultants report summarizing existing usage levels plus 25%.
- Central Market Environs – Grote Street – 4000 per day
Figure based on 10% increase in visitors to the Central Market (1.4million pedestrian count/month divided by 2 (in and out) divided by 18 days per month).

Park Lands

- Frome Park – 36,500 per annum / 100 per day
Figure based on 100 users per day, primarily workers and students during lunchtime.
- Return of alienated Park Lands west of Morphett Street Bridge – 200,000 per annum / 500 per day
Figure based on 1000 casual visits per week (as per Bonython Park) plus 5 events at 30,000 each (Carnevale 40,000).
- Recreation Ring Route – 73,000 per annum

Figure based on 200 visitors per day.

4. Travelling to and around the City

Cycling

- Free City Bike Scheme – 116,800 per annum in the first year
Figure based on 80 bikes available for 2 hours at a time, within an 8 hour day - 320 users per day. The increasing figure represents an anticipated increase in the number of bikes over the years to meet the demand of 1000 users per day identified in the take up survey.

Appendix 5

Cost Benefit Rankings – Visitor Growth Plan Actions

This Appendix presents the proposed actions in the Visitor Growth Plan through a benefit-cost analysis framework.

In doing so, a number of assumptions have been made and require clarification:

- 'Benefit' is defined in terms of the projected number of annual visitors.
- Cost is defined as the net total cost to Council over 5 years.
- Both the costs and the visitor number estimates are highly uncertain. Some actions are enablers, others are generators and others are attractors of visitors. Furthermore, some projects are longer term, others are incremental and others cumulative. The complexity of the interrelationship between these actions cannot be picked up in a simple analysis like this.
- A full cost-benefit analysis would look at each project in much greater detail and would attempt to provide a dollar value on all tangible and intangible benefits and costs, which would then be put into net present value over a longer-term (like a 20 year period) with an appropriate discount rate.
- As such, the cost-benefit analysis in the table below should be seen as only one influence on the value of the projects in the Plan.
- The benefit cost ratio is simply a percentage of annual benefit divided by five year cost multiplied by 100. As the Table below shows, a high benefit cost ratio does not necessarily mean a high impact in terms of the number of projected annual visitors, but rather that the number of visitors per dollar spent is high.
- The usefulness of the benefit/cost ratio is not the actual number but its relativity.
- A probability factor is taken into account for some proposed action. If an action is judged to have an element of risk in terms of achieving its projected visitor number, then a percentage (between 5 and 30%) will be taken off the projected number of annual visitors. Those actions are marked in the table below with a (*).
- The cost benefit analysis excludes net present value estimates that may occur with projects over a long-term time period (eg 20 years).
- No allowance is made for increasing costs due to CPI increases. Over a 5 year period, it would not be unreasonable to assume a cumulative CPI increase of 10%.

Benefit/Costs Rankings Table – Visitor Growth Plan Actions

	Benefit (estimated no of annual visitors)	Cost (\$)	Benefit/Cos t Ratio	Rank
Lobby State Government to provide free City public transport*	192,000	5k	3,832.5	1
Strengthen Rundle Mall retail and tenancy mix*	192,000	25k	766.5	2
Facilitate development of ten-pin bowling facility in the City	36,500	10k	365.0	3
Facilitate a Panorama Observation Area at Santos Building*	36,500	10k	365.0	3
Produce an Access Map and Directory for visitors with a disability	54,750	20k	273.8	5
Prepare precinct maps	36,500	17k	214.7	6
Review and improve Council's safety strategy	36,500	20k	182.5	7
Facilitate the development of a cinema complex in Rundle Mall*	82,125	50k	164.3	8
Lobby State Government to improve public transport services and infrastructure to and within the City*	25,550	20k	127.8	9
Create a city event cost subsidy program for ACC venues	36,500	30k	121.7	10
Continued negotiations for the redevelopment of Victoria Park as a major events park*	13,700	15k	91.3	11
Remove barriers that discourage community groups from conducting events in the City	36,500	40k	91.3	11
Support the implementation of the Glenelg Tram Extension	9,125	10k	91.2	13
Develop a partnership between SATC and Council for integrated brand destination marketing*	233,000	280k	83.1	14
Conduct a targeted on-line youth marketing strategy	91,250	120k	76.0	15
Conduct safety audits	36,500	50k	73.0	16
Torrens River Park	73,000	150k	60.8	17
Strengthen the City's Aboriginal cultural attractions	36,500	60k	60.8	17
Street Markets*	850,000	1,400k	60.7	18
Conduct a destination marketing campaign for the Park Lands and Squares	36,500	70k	52.1	19
Install Electronic Display Technology	182,500	375k	48.7	20
Upgrade Rundle Mall	365,000	1,400k	26.1	21
Continue local problem solving with community groups and individuals	36,500	150k	24.3	22
Continue the UPark Marketing Campaign	182,500	750k	24.3	22
Park Lands week	18,250	110k	16.6	24
Times Square in Pulteney Street	182,500	1,500k	12.2	25
Promote and extend City Bikes Scheme	36,500	350k	10.4	26
Continue the Integrated Marketing Campaign	273,750	3,280k	8.3	27
Install event infrastructure in squares and park lands	54,750	680k	8.1	28
Complete Hindmarsh Square Interactive	54,750	690k	7.9	29

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	Benefit (estimated no of annual visitors)	Cost (\$)	Benefit/Cos t Ratio	Rank
Sculpture Playspace				
Busking Festival	54,750	720k	7.6	30
North Terrace Activity Program	36,500	500k	7.3	31
Major events/activities sponsorship program	365,000	5,000k	7.3	31
Upgrade Victoria Square	36,500	500k	7.3	31
Install Real-time signage	36,500	600k	6.1	34
Upgrade Central Market Environs	73,000	1,362k	5.4	35
Upgrade the Riverbank Precinct and create a major events area*	82,125	1,600k	5.1	36
Park Lands Trail	73,000	1,500k	4.9	37
Spaces Alive (music in the square)	18,250	400k	4.6	38
Retain and conduct signature events	54,750	1,670k	3.3	39
Upgrade North Terrace	182,500	5,700k	3.2	40
Continue to fund ACTA and ATM	36,500	1,300k	2.8	41
Christmas in the City	36,500	1,652k	2.2	42
Deliver the Annual Public Art program	18,250	1,650k	1.1	43
City Lighting Renewal	54,750	5,600k	1.0	44
Bus Station/Car parking building project and plaza	91,250	21,000k	0.4	45