• Desired Study Objectives

The outback region in the Far North of South Australia has great potential for domestic and international tourism. It is one of the most important tourism regions in the State containing many unique natural features with great potential for the emerging eco-tourism, nature-based travel and special interest markets.

There are a number of development initiatives required if the region is to achieve its tourism potential focussing on improving visitation, yield, product and infrastructure.

Specific objectives for the study to achieve these aims have been set as follows:-

• To identify development opportunities for new and upgraded products and packages particularly for eco-tourism and special interest tourism

• To encourage sustainable tourism development that reflects and reinforces the character, culture and natural features of the region

• To identify existing barriers to successful tourism development and to identify solutions

• To determine the tourism opportunities that would maximise the use of the existing infrastructure within the region, particularly major settlements

• To devise strategies which should encourage private sector investment in tourism development within the region.

• To provide a direction for the preparation of business and marketing plans

• Desired Outcomes

In order to give expression to these objectives the following outcomes are anticipated:-

• Specific product packages for sale and distribution to the retail and wholesale markets to be trialed in major domestic and international markets with assistance from the South Australian Tourism Commission;
• Detailed marketing and strategic directions for the development of tourism in the Northern Tourism Marketing Board area;

• An action plan to address the major tourism product and infrastructure gaps;

• Identification of the infrastructure required to support investment and to provide for and manage the impact of visitors;

• Objectives and strategies to achieve economic and environmental sustainability;

• An implementation strategy that identifies the program of works and actions, organisational responsibilities and timelines;

• Draft guidelines for tourism development in the region.

**Required Study Program**

The study program should be developed around eight stages. Estimated times are shown for each activity and stage.

<table>
<thead>
<tr>
<th>Stage</th>
<th>Activity</th>
<th>Start Date</th>
<th>End Date</th>
<th>Study Hours</th>
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<tr>
<td>Stage 1 - Briefing</td>
<td>Steering Committee Meeting 1 - Briefing</td>
<td>July 1995</td>
<td></td>
<td>6</td>
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<td></td>
<td>steering Committee Meeting 3</td>
<td>June 1995</td>
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**STAGE 1 - BRIEFING**

3 activities, total 24 estimated study hours.

*Steering Committee Meeting 1 - Briefing (say 6 study hours)*

• The structure for membership of the steering committee is one member of the eco-tourism project Steering Committee, two representatives selected by the Regional Marketing Board, one representative from the Department of Environment and Natural Resources and one
representatives from the Tourism Commission who should chair the Committee.

- Finalise all details of the project with the Steering Committee prior to commencing the project.
- Receive the latest documentation on tourism marketing strategy prepared by the Commission and the Regional Marketing Board.
- Discuss the study program in general terms and note any key factors in terms of priorities, content and process that need to be added or varied, particularly for Stage 2.

**Industry organisation briefing (say 16 study hours)**

Each of the above organisations is to be visited

- to receive any further strategy, planning and budgeting documentation prepared by them.
- to discuss organisation structure and relevant job descriptions
- to discuss a list of key contacts and industry members for database preparation.
- to discuss the study program and steps involving their organisation

**Public notification (say 2 study hours)**

- The public consultation process is detailed under Stage 3 and Stage 6 headings below.
- Appropriate letters and advertisements should be prepared notifying industry members and the general public about a series of meetings to be held in various locations during the public consultation phase.
- It is recognised that communication is a key component in the study and all publicity material should be designed not only to inform but also to enthuse the target audience.

**STAGE 2 - RESEARCH**

14 activities, total 198 estimated study hours.

**Computer data base - references & contacts (say 40 study hours)**

- A computerised database should be established for both references and contacts.
• All the existing reference material and documentation relevant to the study should need to be perused and catalogued.

• Contact information (e.g. name, address and other details) should need to be recorded for each relevant individual and organisation, to ensure the widest possible reach for communication material and for survey questionnaires.

Tourism market analysis (say 20 study hours)

• All relevant statistical and market reports should be studied and evaluated in order to get a clear picture of market profiles, trends, segments, competitive behaviour and problem and opportunity areas.

• A summary of market information gaps should also be prepared.

Analyse existing consumer & trade research (say 20 study hours)

• Relevant quantitative and qualitative surveys should be studied including relevant overseas material relating to eco-tourism and nature-based tourism, etc.

• Information gaps relevant to the project area should also be identified.

New consumer & trade research - focus groups (say 40 study hours)

• From a planning and marketing point of view the identification and satisfaction of consumer needs is paramount.

• The study must allow for some additional consumer and trade market research, by way of interview, to explore motivations and the range and depth of consumer attitudes concerning image and product preference, particularly for the interstate and overseas traveller.

• Some of this research should be carried out in key destination areas and some in the nearest capital cities.

• Should a more detailed survey be considered necessary in the future, this must be outlined in the strategy recommendations.

Tourism inventory analysis (say 40 study hours)

• A comprehensive tourism inventory analysis is required for each product and location category with cross-references to the target markets served and visitation and yield being generated.

• Objectively assess the natural and built features of the area to determine cultural, heritage and eco-tourism opportunities.

• Consequent development concepts must be studied in line with traveller trends, heritage and ecological interpretation and visitor management.
- Proposed projects (mooted or approved) should also be examined and conceptually screened as to their fit with existing target marketing and product strategy documentation.

- Where a reasonable prima facie case exists for their inclusion, additional development concepts should be noted.

**Existing strategy research - tourism (say 5 study hours)**

- All the relevant planning documentation, performance indicators and trends which might affect the region must be researched and considered at this point and input into the process for joint understanding and evaluation.

**Existing strategy research - economic development (say 5 study hours)**

- Some economic development workshop and planning activity has already been conducted in the region and the results should be studied as part of the process.

- In addition State and regional economic strategy plans must also be analysed.

**Existing strategy research - environmental & development planning (say 20 study hours)**

- A full environmental audit is not anticipated

- Instead there must be a focus on the key issues for sensitive areas (including carrying capacities) as well as for the project area as a whole.

- Part of this assessment should include the management and funding considerations for environmental protection and upgrading and appropriate policies and objectives for land use planning and zoning. It is anticipated that the "user pay" issue should emerge during the public consultation phase and a full understanding of the costs involved is essential.

- Particular attention should be given to the definition of desired future characters for key tourism zones and to principles for guiding planning and development in these areas.

**Industry organisation research (say 12 study hours)**

- It will be necessary to re-visit the industry organisations mentioned in Stage 1 (and others) to be fully informed about what has been done in the past and what is planned for the future.
• An assessment of the effectiveness of each organisation in terms of performance achievement against objectives and goals and perception about the organisation's standing and credibility among organisation members (perhaps using survey techniques) should be made.

**Competitor analysis (say 10 study hours)**

• A comparison should be made of the project area’s strengths and weaknesses relative to other regional and interstate competitive locations in order to help develop a unique competitive product offering.

• The opportunities for developing a co-operative approach with adjoining areas in order to expand the market further must also be considered.

**Issue research (say 10 study hours)**

• The study of documentation in previous steps, along with further research, interviews and discussions should help generate a list of issues which can be defined and analysed for later use, particularly in preparation for workshop activity.

• Care should be taken not to pre-empt the rights and opportunity for workshop attendees to brainstorm and develop their own issue statements. However, prior preparation should help workshop facilitation.

**Preliminary situation and SWOT Analysis (say 20 study hours)**

• A situation analysis should be prepared by distilling the analyses prepared in the previous steps including:
  
  • a summary of the market situation from the marketing analysis by looking at the demand and supply situation and history
  
  • the underlying determinants of demand should be listed and weighted for the total market and for each important segment.
  
  • on the supply side, a summary of the major factors at work including competitive positioning, investment attraction, infrastructure funding and industry organisation structure and effectiveness.
  
  • three scenarios of future demand (optimistic, realistic and pessimistic) with relevant assumptions.

• A preliminary SWOT analysis should be prepared listing in a preliminary fashion the relevant strengths, weaknesses, opportunities and threats for the area for potential use during the public consultation phase, again without pre-empting the attendees right and opportunity to
participate in a "clean sheet" SWOT analysis, and later in a survey to validate SWOT conclusions.

**Stage 2 report - progress & plan (say 20 study hours)**

- Report to summarise activities, key points and remaining work.
- Position papers may be necessary.

**Steering Committee Meeting 2 - review (say 6 study hours)**

To review the progress report and endorse the plan for the next stage.

**STAGE 3 - PUBLIC CONSULTATION**

5 activities, total 105 estimated study hours.

- A series of both regional and special interest workshops should be conducted to canvass views about the project and particularly attitudes as to
  - whether tourism is seen in a positive or negative light
  - the mix of tourism and in particular to eco- and cultural tourism
  - issues that need to be addressed by the region to ensure that it can increase and control tourism visitation growth
- These issues and ideas should then be considered within a clear business planning framework to arrive at groups of issues, goals and strategies and prioritisation of these into clear actions
- Stakeholders' to be invited should include tourism operators, members of the community in general, local government, (both within, and adjacent to, the area) local or regional development authorities, standing members of State and Federal government, academic institutions, tourist associations, farmers and other resource associations, retailers, commence, banking, etc. parks and local government bodies etc

**Key stakeholder workshops (say 9 study hours)**

- Separate workshops for key industry members should precede the public workshop.
- It may be necessary also to hold additional workshops with industry groups after the public workshop process to take the findings to a greater depth.
- Discussion and debate on identity / image, key problem and opportunity areas, priorities and alternative strategy definition must be encouraged.
• As the draft strategy develops we should be trying to stimulate the awareness, interest and motivation of the key players to see themselves taking ownership of the plan and process after the study is completed.

• In a sense, we should be marketing the study itself while it is being completed and also examining first-hand the way each organisation works and the need for changes to these organisation structures to drive the process better for the long term.

**Public consultation workshops (say 40 study hours)**

• This is a key step in the project and essential for community ownership and commitment. The workshop process is a medium not only for input but for establishing communication links and promoting the study.

• In each workshop there should be ample opportunity to discuss strengths, weaknesses, opportunities, threats, existing character, desired future character, community values and concerns, etc.

• Emerging from the discussion should be the identification of key issues.

• Some demographic analysis of the residential population in each area should be completed and any existing social analyses at the local level should be examined.

• It is to be expected that issues concerning sustainability will need to be properly addressed and discussed in an objective way in order to help resolve the economic and environmental concerns of the local and wider community.

• If these issues can be identified early enough it may be possible to manage their development and resolution in a way suitable to most people without risking the progress of the study through subjectively based opposition which falls outside the ambit of commonly agreed, desired and sustainable outcomes.

• Strategies for communication and key player involvement should be designed to avoid these risks while at the same time building a positive and creative climate to ensure widespread acceptance and effective follow-through to attain the agreed objectives.

• The nexus between the community's physical resources and the ability of its human resources to respond to the challenges of growth that lie ahead must be recognised.

**Issue validation survey (SPSS) (say 30 study hours)**

• The issues identified during the industry and public workshops should be defined and presented in questionnaire format afterwards for
distribution to the attendees in order to gain a more thorough and objective assessment of attitudes.

- Some of the industry and public participants may not have been properly informed as to the breadth and depth of the issues involved and might value an opportunity to provide additional input in a properly structured and presented way.

- Completed questionnaires should be processed using SPSS software (Statistical Package for Social Sciences) and the frequency and cross-tabulation responses presented accordingly.

**Stage 3 report - progress & plan (say 20 study hours)**

- A progress report for this stage summarising the activities undertaken and the points to be highlighted together with details of the work plan for the following stage should be prepared and provided to the Steering Committee.

- Part of this progress report might need to be released in the form of position papers to a select wider group for feedback to the Steering Committee, particularly on critical issues, and to help to more effectively plan the remaining stages.

**Steering Committee Meeting 3 - review (say 6 study hours)**

- Report to summarise activities, key points and remaining work.

- Position papers may be necessary.

**STAGE 4 - STRATEGIC ANALYSIS**

10 activities, total 96 estimated study hours.

**Final situation and SWOT analysis (say 5 study hours)**

- This should follow a similar process to the preliminary situation and SWOT analysis but should incorporate the findings from the workshops and questionnaires.

- Questions concerning key situational facts and SWOT issues should be included in the questionnaire.

**Target market evaluation (say 7 study hours)**

- The target market identification and evaluation should flow from the preceding market research.

- Each target market proposed should be screened first using appropriate market selection criteria.
• Target markets that are successfully screened should then be fully described in both qualitative and quantitative terms to facilitate the development of the draft strategy and draft marketing plan.

*Infrastructure & environmental analysis (say 5 study hours)*

• This does not include product.

• Included are those community assets that help the tourist access the product, e.g. information distribution points, signage, transport, roads, air routes, public facilities, etc. This is traditionally the province of Local, State and Federal government.

• The environmental analysis should summarise the key environmental concerns and priorities identified in earlier steps.

*Product portfolio & positioning analysis (say 15 study hours)*

• This should be the first attempt to map the market in terms of product fit to target market categories in a comprehensive way.

• The aim should be to identify gaps and niches based on an analysis of the problems and opportunities evident from the matrix analysis.

• Positional strategies that build on strength, overcome weaknesses and establish a clear and identifiable position in competitive and consumer terms should then be developed.

• All development strategies and levels of development should then be properly defined for the next step.

• Product packages should be defined as part of this step in a format for later validation.

*Alternative scenario definition (say 4 study hours)*

• Alternative scenarios based on proposals and levels from the previous step together with the alternatives of future demand, (e.g. optimistic, realistic and pessimistic) should be prepared.

• Each scenario should be described fully together with consequences and impact.

*Strategic alliance strategies (say 4 study hours)*

• The opportunities to forge alliances with adjoining regions and States should be defined.

• A range of alternatives should be suggested but not analysed in any depth on the basis of negotiations, etc.
• This activity would follow as part of the strategy once the strategy plan is approved.

*Investment attraction strategies (say 6 study hours)*

• A key to the "yield" aim is to demonstrate existing and potential profitability for operators, developers and investors.

• An investment attraction planning outline should be loosely defined to tie in with the product portfolio suggestions of an earlier step.

*Cost benefit analysis (say 10 study hours)*

• It should be important to have a descriptive assessment of the costs and benefits of tourism to the community to help in the public review process by clearly defining the economic value of tourism.

• A clear answer to the question "Why tourism?" must be provided.

*Stage 4 report - progress & plan (say 20 study hours)*

• Report to summarise activities, key points and remaining work.

• Position papers may be necessary.

*Steering Committee Meeting 4 - review (say 6 study hours)*

To review the progress report and endorse the plan for the next stage

**STAGE 5 - DRAFT STRATEGY**

8 activities, total 210 estimated study hours.

*Draft strategy definition (say 18 study hours)*

• The draft strategy should be developed from the preceding research, consultation and analysis and should be subsequently modified during the public review and market validation stages.

• The overall strategy should represent a general action plan for applying resources to meet major objectives. Emphasis is on the word 'general'. We define strategy as being a broad course of action designed to gain significant leverage on the achievement of the objectives. A strategy is a way forward, an alternative route in a range of alternative routes to the objective as a destination. It is this feature that distinguishes a strategy from a detailed action plan.

• We are seeking proposals bold in character and vision, broad in scope, of major importance, of a break-through nature, and preferably achievable with the lowest level of resource input.
The following questions must be answered in respect to each of the proposed strategies:

**Communicability**

- is the proposed strategy "identifiable" and "understandable" for the stakeholders?

**External fit**

- is the proposed strategy consistent with State tourism strategy, the natural environment and market opportunities?

**Internal fit**

- is the proposed strategy consistent with industry strengths, objectives, policies, resources and values?

- note, each product and market development proposal should be screened as to its impact on the objectives

**Risk**

- does the proposed strategy achieve minimal risk with maximum yield consistent with resources and prospects?

**Alternatives**

- has the proposed strategy resulted from a process of objective analysis and incorporate maximum application of imagination and creativity?

- does it respond to defined problems and opportunities?

- has there been a careful appraisal and comparison with other alternatives to help establish the key factors for success?

**Quantification**

- is the proposed strategy measurable in terms of time (not be open ended) and performance?

- can identifiable outcomes and performance parameters be set?

**Continuity**

- should the proposed strategy be conducive for continual review and planning?

- A series of benchmark review points should be recommended over the next five years, to monitor progress and to facilitate change if necessary, in order to ensure the best continuing outcomes,
particularly having in mind that possible changes in key players and personnel in the region.

**Draft marketing plan definition (say 40 study hours)**

- This should be drawn up to create and promote the identity, image or profile of the area immediately and to work in with product development and projected visitation growth over the 10 year period.

- It should clearly identify target markets and aim very precisely for these, in all recommendations given.

- It should cover the complete marketing mix, not only the traditional positional advertising and promotion, but co-operative opportunities presented through State and Federal tourism agencies, through large hotel, airline or coach companies and through packaging suggestions to inbound operators and wholesalers.

**Financial & funding evaluation (say 20 study hours)**

- All the major proposals should be individually costed and recommendations concerning their fundability and source of funding should be provided to the best of our ability in the time available.

**Product package evaluation - retail, wholesale (say 20 study hours)**

- The product packages identified in the "product - portfolio" step should then be tested at a retail and wholesale level to measure immediate reactions and likely product strength.

**Draft Strategy report preparation (say 60 study hours)**

- This is where the research, public consultation and strategic analysis comes together in one report. The headings for this report might follow the steps in this consultancy schedule with provision of course for objectives and the strategies identified.

- The challenge however is to prepare the report in an easy to follow manner. Whatever format is chosen, answers to the following questions must be provided:

  **Appreciation**

- Where are we now?

- Where have we come from? (inc. current situation and SWOT analysis, past performance review)

  **Aim**

- Where do we want to go and why? (inc. mission / role, general aims, direction, objectives, goals);
Alternatives
- Which ways **might** we go? (inc. alternative strategies and impact analyses);

Analysis
- Which ways **can** we go?

Decide
- Which way **should** we go and why.

Plan
- What, how, who, when, where (action plan and budget);

Organise
- What resources are required (inc. human, physical and financial)
- What are the key roles and responsibilities in the industry organisation structure?;

Staffing
- Who are the key players?
- How well does the existing human resource base and organisation structure measure up to the plan requirements?
- What needs are there for education, training, motivation and development?
- Is human resource development / service a key strategy?;

Direction
- Who is in charge?
- Who should be in charge?
- How is the government / private sector partnership going to work?;

Control
- What controls are necessary for the allocation of funds and to review, correct, re-plan and re-budget?.

**Stage 5 report - progress & plan (say 20 study hours)**
- Report to summarise activities, key points and remaining work.
• Position papers may be necessary.

**Steering Committee Meeting 5 - endorsement (say 6 study hours)**

To review the progress report and endorse the plan for the next stage

**Publicity for public review process (say 6 study hours)**

A notice advising of the following public review process should be prepared for insertion into local papers and direct mailed to those on the database.

**STAGE 6 - PUBLIC REVIEW**

8 activities, total 148 estimated study hours.

**Public dissemination & exhibitions (say 15 study hours)**

• Copies of the draft strategy would be made available for inspection and comment.

• It may be necessary to establish a "drop in" information area in local government offices in each key local area with suitable display material to provide information about the draft strategy and to help obtain additional comment.

**Public workshops (say 40 study hours)**

A further opportunity for industry and the public to come together and develop a consensus together.

**Public attitude survey (Delphi) - prepare & send (say 30 study hours)**

An essential follow-up. Participants in the workshops should be invited to participate in an iterative Delphi process to determine strength of feeling for the various issues raised.

**Public attitude survey (Delphi) - analysis (say 40 study hours)**

This involves processing an analysis of the Delphi generated feedback.

**Public attitude study (Delphi) - client review (say 6 study hours)**

• The attitude study results would be essential for the framing and acceptance of the draft strategy.

• All stakeholders should have had the widest possible opportunity to express their views in the most systematic and objective way available.
• This should provide some additional comfort to policy makers and legislators. The study should help minimise the risks and maximise the chances for success for the strategy.

**Amendments to draft strategy (say 6 study hours)**

The attitude study should probably generate opportunities to tune the strategy up further in terms of the desired aims and objectives.

**Stage 6 report - progress & plan (say 20 study hours)**

• Report to summarise activities, key points and remaining work.

• Position papers may be necessary.

**Steering Committee Meeting 6 - review (say 6 study hours)**

To review the progress report and endorse the plan for the next stage

**STAGE 7 - MARKET VALIDATION**

5 activities, total 186 estimated study hours.

**New packages - consumer research (say 40 study hours)**

• Several small focus groups would be organised just to test immediate reaction and attitude strength to the key development proposals.

• This is not meant to be an exhaustive consumer research study but just to point the way for a wider exercise as part of the implementation work to follow the launch of the new strategy.

**New packages - trade research (say 40 study hours)**

• This is an essential step. The package must excite the trade and be seen as commercially viable for them.

• Small focus groups may be used but most of the work in this step should be carried out by executive interview.

**New packages - test marketing (say 80 study hours)**

• This step needs to be more fully defined in conjunction with the State tourism authority and depends very much on what findings can be presented.

• The duration for this step should depend also on the test objectives, e.g. if we are looking for a sales response then the duration would be a lot longer. If, however, the test objective is primarily to generate a favourable response to a commercially formatted package (rather than a concept) then this duration would be appropriate.
Stage 7 report - progress & plan (say 20 study hours)

- Report to summarise activities, key points and remaining work.
- Position papers may be necessary.

Steering Committee Meeting 7 - review (say 6 study hours)

To review the progress report and endorse the plan for the next stage.

STAGE 8 - FINAL STRATEGY

3 activities, total 66 estimated study hours.

Final Tourism Strategy - preparation (say 30 study hours)

Final Marketing Plan - preparation (say 30 study hours)

Steering Committee Meeting 8 - endorsement (say 6 study hours)
I. TOURISM IN SOUTH AUSTRALIA

- Between 1985 and 1992 tourism has shown steady growth with an annual average rate of increase of around 2% in the number of visitors to South Australia.

- Between 1985 and 1992 the number of international visitors to South Australia grew by 10% pa. while visitor nights grew by 3% pa.

- Overall, the tourism growth achieved by SA reflects national trends of tourism growth. SA has achieved marginally better growth rates as a consequence of the success of some specific special events.

- Tourism is an industry with considerable potential for future growth. At an international level the World Tourism Organisation forecasts that
  - international tourist arrivals will increase world wide, at an average annual rate of 4.2% during the 1990s.
  - for the Asia / Oceania Region the annual average rate of growth in tourist arrivals will be over 8%.

- Australia is well placed to capture a significant share of this market.

- SA is positioned to capture emerging markets with its range of tourism opportunities emphasising close to nature, wildlife and aboriginal cultural experiences.

• COOBER PEDY PRODUCT

A. Identity / Image

Coober Pedy is in the Far North (Outback) region and provides a distinct opal and outback experience that has found favour with Australian and overseas tourists alike.

South Australia is the opal capital of the world with 95% of the world’s opal being mined in this State. Visitors have a strong interest in opal and there are even opal experiences in the City of Adelaide where visitors can see opal shops, opal manufacturing and videos on opal mining and opal-field lifestyles.

The whole Far North Region offers a large number of scenic, cultural and heritage related attractions with a unique natural landscape, outback lifestyle and significant Aboriginal and European heritage.

Whilst Coober Pedy is a well known opal mining area, it has great strategic significance as a gateway and hub for the Outback, and could in time be compared with Alice Springs in character, albeit on a smaller scale.
It certainly will provide a key focus for tourists seeking Aboriginal contact, culture and experience. Coober Pedy has a large Aboriginal population, who with training and community involvement, could become a valuable tourism asset. Furthermore, many Aboriginals live in bush settings quite close by on nearby cattle stations.

Far North tourism has increased considerably with improved accessibility now that the Stuart Highway has been bituminised and also because of an increasing trend for outback/adventure holidays.

2.2 Seasonal Nature

The prime season for holiday visitation is traditionally the winter months (May to October) when the weather provides ideal holiday conditions. This applies to tourists using the Far North as a destination or as a stopover for travellers on their way Further North.

Reflecting this, the peak accommodation occupancy month in the Far North is August (57.4%) with the period May-September exceeding the yearly average (approximately 40%). The worst month is February (25%). In the five-year period 1984-1989 the highest occupancy was in July 1987 with 65.1% and the lowest 19.5% in January 1985.

Caravan parks in the Far North achieve an annual occupancy in the vicinity of 17% which is about the South Australian average.

2.3 Accommodation

In 1992/93 there were 9 accommodation establishments providing 363 rooms. These establishments sold 47,650 nights with an average occupancy of 35.9%, which is comparable to other S.A. country areas.

3. COOBER PEDY VISITOR SURVEY

A visitor survey was carried out by the Office of Tourism Industry Development on behalf of the Coober Pedy Retail Business and Tourism Association. It was conducted in 1993 during August and September and represents strong confirmation for new product development in Coober Pedy.

Some of the highlights of this survey are as follows:

Visitor origin

15.5% of the sample were from overseas and half the sample came from Victoria, New South Wales and ACT. Visitors from Adelaide were 15% of the sample.
Visitor Nights

56% stayed one night, 31% two nights and 12% for longer periods.

Activities undertaken

The statistics allow for multiple responses. 77% visited opal mines / displays, 59% visited an underground home, 50% took a town tour, 48% purchased opal, 44% went opal noodling and 30% visited the Breakaways.

Activities enjoyed

46% found visiting opal mines / displays particularly enjoyable, 27% liked the town tour and 20% liked opal noodling. Generally speaking, these percentage responses indicate that there are many opportunities for improvement.

Activities would have liked

This data provides the strongest possible confirmation for recent Coober Pedy new product proposals. Its importance must be stressed. It confirms the South Australian tourism strategy favouring gateway, Aboriginal, ecotourism concepts.

New product proposals should include;

- higher activity for opal mining than just noodling and passive visits to opal mines;

- high contact with Aboriginals, particularly in authentic settings.

Product profile

The visitors agreed that Coober Pedy provided a really different lifestyle (87%), was educational (78%), was not an over-developed place (77%), had lots of things to see and do (75%), loved the wide open spaces (65%) and was the experience of a lifetime (64%). Of some concern however, is that 63% agreed that they would only want to visit Coober Pedy for a day or two. This highlights the need to strengthen the product to encourage a longer stay.

Mode of travel

53% travelled by normal passenger car, 10% by coach, 29% by 4-wheel drive and 1.5% by aeroplane. The high 4-wheel drive percentage augurs well for “tagalong” tours. The low aeroplane percentage would suggest an opportunity, particularly with strong growth rates for Coober Pedy tourism.

Recommend Visit

97% would recommend a visit to Coober Pedy.
Satisfaction
71% rated “Range of things to see and do” as good but there were concerns about the quality and value of accommodation and tourism information, etc. There is obvious room for improvement here.

Opal Expenditure
The average (mean) expenditure for the sample group was $107. The most common (median) expenditure was $4 and the maximum expenditure $8,500 by one tourist.

4. COOBER PEDY VISITATION

4.1 Domestic

The domestic statistics are collected from the Domestic Tourism Monitor (DTM). Figures earlier than 1988 are not comparable with more recent statistics and therefore the Office of Tourism Industry Development recommends their exclusion. They have provided the following figures:

<table>
<thead>
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<th>Year</th>
<th>Visits</th>
<th>Visitor Nights</th>
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<td>1988/89</td>
<td>50,000</td>
<td>143,000</td>
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<tr>
<td>1989/90</td>
<td>64,000</td>
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<td>1990/91</td>
<td>47,000</td>
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<tr>
<td>1991/92</td>
<td>52,000</td>
<td>135,000</td>
</tr>
<tr>
<td>1992/93</td>
<td>37,000</td>
<td>73,000</td>
</tr>
</tbody>
</table>

The Office of Tourism Industry Development cautions us in the interpretation and use of these figures with the following note: “At the 95% confidence limit a survey estimate of 50,000 visits is associated with confidence limits of plus or minus 60%”. The reason for this cautionary note is that these statistics are based on samples and are therefore not reliable. For example, the figure for 1992/93 could easily be plus or minus 22,000 ie. it could be as high as 60,000.

In these circumstances, averaging the visitation statistics over the 5-year period would be more appropriate. The average number of visits over the 5-year period is 50,000 visits per annum and the average number of visitor nights is 130,000. On average, therefore, visitors are staying 2.6 nights.

4.2 Competitive Positioning

As far as competitive positioning for domestic visitation is concerned the figures for number of visits for 1988/89 indicate that Coober Pedy ranked higher than many other towns, however but could not match many of these towns in terms of number of visitor nights. The obvious conclusion from the 1989 statistics was that Coober Pedy had to increase the length of stay of visitors by...
providing other experiences for tourists. The average nights stay in 1989 was 2.86 nights.

The figures for 1992/93 are more sobering with 37,000 visits, 73,000 visitor nights and an average nights stay of 1.97 nights. By comparison, Coober Pedy visitation seems to have slipped compared with 1988/89 and with other locations. This could indicate statistical error and / or a higher dependence on the state of the economy or even “fear” because of recent backpacker murders.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Coober Pedy</td>
<td>50,000</td>
<td>143,000</td>
<td>37,000</td>
<td>73,000</td>
</tr>
<tr>
<td>Pt Lincoln</td>
<td>48,000</td>
<td>324,000</td>
<td>46,000</td>
<td>213,000</td>
</tr>
<tr>
<td>Glenelg</td>
<td>47,000</td>
<td>275,000</td>
<td>66,000</td>
<td>230,000</td>
</tr>
<tr>
<td>Whyalla</td>
<td>45,000</td>
<td>173,000</td>
<td>92,000</td>
<td>394,000</td>
</tr>
<tr>
<td>Loxton</td>
<td>44,000</td>
<td>70,000</td>
<td>35,000</td>
<td>103,000</td>
</tr>
<tr>
<td>Robe</td>
<td>42,000</td>
<td>181,000</td>
<td>46,000</td>
<td>172,000</td>
</tr>
<tr>
<td>Moonta</td>
<td>38,000</td>
<td>77,000</td>
<td>28,000</td>
<td>83,000</td>
</tr>
<tr>
<td>Berri</td>
<td>35,000</td>
<td>71,000</td>
<td>40,000</td>
<td>111,000</td>
</tr>
<tr>
<td>Clare</td>
<td>35,000</td>
<td>135,000</td>
<td>33,000</td>
<td>108,000</td>
</tr>
</tbody>
</table>

Source: Domestic Tourism Monitor (DTM)

**Note 1:** The source of the above estimates is the DTM. The data refers to only domestic visits and nights for persons 14 years and over.

**Note 2:** Because the DTM is based on a sample survey, caution needs to be exercised in the way data are used. This particularly applies to data for small regions / towns.

### 4.3 International Visitation

Figures are available from the International Visitor Survey (IVS).

In 1989 overseas visits to Coober Pedy (including daytrippers) reached 61,600 (placing domestic and overseas visitation on an equal footing for that year) with 25% of all incoming overseas tourists including Coober Pedy on their itinerary.

By 1992, however, this figure had fallen to 17%, most likely because of the concerns about backpacker safety or alternatively a weakening in South Australian tourism marketing relative to other States (see following figures):
### INTERNATIONAL VISITATION TO S.A.

<table>
<thead>
<tr>
<th>Location</th>
<th>1989</th>
<th>1992</th>
<th>Change Percentage</th>
<th>Change in Visitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adelaide</td>
<td>91%</td>
<td>90%</td>
<td>0%</td>
<td>222,000 → 206,600</td>
</tr>
<tr>
<td>Barossa Valley</td>
<td>45%</td>
<td>40%</td>
<td>5%</td>
<td>109,900 → 91,100</td>
</tr>
<tr>
<td>Adelaide Hills</td>
<td>43%</td>
<td>33%</td>
<td>10%</td>
<td>104,000 → 76,100</td>
</tr>
<tr>
<td>Victor Harbor</td>
<td>26%</td>
<td>19%</td>
<td>7%</td>
<td>62,300 → 44,000</td>
</tr>
<tr>
<td><strong>COOBER PEDY</strong></td>
<td><strong>25%</strong></td>
<td><strong>17%</strong></td>
<td>8%</td>
<td><strong>61,600</strong> → <strong>39,900</strong></td>
</tr>
<tr>
<td>Hahndorf</td>
<td>24%</td>
<td>23%</td>
<td>1%</td>
<td>58,500 → 52,900</td>
</tr>
<tr>
<td>Cleland Wild Life Park</td>
<td>22%</td>
<td>14%</td>
<td>8%</td>
<td>52,600 → 33,100</td>
</tr>
<tr>
<td>River Murray</td>
<td>20%</td>
<td>14%</td>
<td>6%</td>
<td>48,100 → 33,100</td>
</tr>
<tr>
<td>Mt Gambier</td>
<td>13%</td>
<td>11%</td>
<td>2%</td>
<td>32,400 → 26,000</td>
</tr>
<tr>
<td>Kangaroo Island</td>
<td>12%</td>
<td>13%</td>
<td>1%</td>
<td>29,800 → 30,800</td>
</tr>
<tr>
<td>Flinders Ranges</td>
<td>12%</td>
<td>11%</td>
<td>1%</td>
<td>29,700 → 24,100</td>
</tr>
<tr>
<td>Clare Valley</td>
<td>10%</td>
<td>7%</td>
<td>3%</td>
<td>24,100 → 15,700</td>
</tr>
<tr>
<td>Port Lincoln</td>
<td>4%</td>
<td>3%</td>
<td>1%</td>
<td>9,300 → 7,100</td>
</tr>
</tbody>
</table>

**Note 1:** These visitation statistics include “day trippers”, i.e. those people visiting a location without staying overnight. This should be realised when making comparisons between these statistics and those in paragraph 4.1 above.

**Note 2:** These figures are contained in the International Visitor Survey (IVS) and are based on sample data for persons 15 years and over and should be interpreted with caution on a year by year basis but should be reasonably reliable when “smoothed”.

The level of overseas visitation to Coober Pedy is comparable to Cleland Wild Life Park, Victor Harbor, Hahndorf and the Adelaide Casino.

The main generating areas of visitors coming to Australia are Europe, Canada, UK & Ireland, USA, Japan, Asia and New Zealand.

Twice as many USA visitors visit the Barossa Valley compared with Coober Pedy, but Coober Pedy is as popular as the River Murray and Victor Harbor. The Japanese like the Adelaide Hills, particularly Cleland Wild Life Park and Hahndorf and find Coober Pedy as popular as the Barossa Valley and Victor Harbor. Visitors from other parts of Asia have a stronger preference to see the Barossa Valley than the Japanese or the Americans and are more disposed to see the Adelaide Hills. People from Hong Kong find Coober Pedy very attractive as do also the Europeans.
5. FAR NORTH VISITATION

5.1 Total Visitation

When we combine the statistics referred to below for domestic and international visitation the total picture is as follows:

<table>
<thead>
<tr>
<th></th>
<th>Domestic</th>
<th>International</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Av.% Inc. pa</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>No. of Visits</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1985/86</td>
<td>73,000</td>
<td>8,400</td>
<td>81,400</td>
</tr>
<tr>
<td>1986/87</td>
<td>103,000</td>
<td>14,800</td>
<td>117,800</td>
</tr>
<tr>
<td>1987/88</td>
<td>103,000</td>
<td>22,000</td>
<td>125,000</td>
</tr>
<tr>
<td>1988/89</td>
<td>130,000</td>
<td>28,900</td>
<td>158,900</td>
</tr>
<tr>
<td>1989/90</td>
<td>175,000</td>
<td>45,200</td>
<td>220,200</td>
</tr>
<tr>
<td>1990/91</td>
<td>143,000</td>
<td>42,100</td>
<td>185,100</td>
</tr>
<tr>
<td>1991/92</td>
<td>165,000</td>
<td>39,800</td>
<td>204,800</td>
</tr>
<tr>
<td>1992/93</td>
<td>130,000</td>
<td>39,600</td>
<td>169,600</td>
</tr>
<tr>
<td><strong>Average growth pa.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Over 7 years</td>
<td>8.6%</td>
<td>24.8%</td>
<td>11.1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Domestic</th>
<th>International</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Av.% Inc. pa</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Number of Visitor Nights</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1985/86</td>
<td>288,000</td>
<td>27,000</td>
<td>315,000</td>
</tr>
<tr>
<td>1986/87</td>
<td>375,000</td>
<td>31,000</td>
<td>406,000</td>
</tr>
<tr>
<td>1987/88</td>
<td>536,000</td>
<td>32,000</td>
<td>568,000</td>
</tr>
<tr>
<td>1988/89</td>
<td>471,000</td>
<td>33,000</td>
<td>504,000</td>
</tr>
<tr>
<td>1989/90</td>
<td>646,000</td>
<td>101,000</td>
<td>747,000</td>
</tr>
<tr>
<td>1990/91</td>
<td>368,200</td>
<td>120,000</td>
<td>488,200</td>
</tr>
<tr>
<td>1991/92</td>
<td>516,000</td>
<td>173,000</td>
<td>689,000</td>
</tr>
<tr>
<td>1992/93</td>
<td>451,000</td>
<td>181,650</td>
<td>632,650</td>
</tr>
<tr>
<td><strong>Average growth pa.</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Over 7 years</td>
<td>6.6%</td>
<td>31.3%</td>
<td>10.5%</td>
</tr>
</tbody>
</table>

The total visitation figures over the 7-year period 1985/86 - 1992/93 have shown an average rate of growth of 11.1% pa. The domestic component average rate of growth (see figures below) has been 8.6% pa. whilst international visitation has averaged 24.8% pa. Irrespective of the year to year fluctuations, which are probably caused by the business cycle and perhaps “fear” because of backpacker murders, there is a strong undercurrent of growth. The same is true for visitor nights which over the 7 year period have shown an average rate of growth of 10.5% pa. (domestic 6.6% pa., international 31.3% pa.).
5.2 Domestic Visitation by State

Domestic visitation to the Far North (the Outback) has grown significantly in recent years, particularly from metropolitan Adelaide as the following figures and graph indicate:

**Far North Number of Domestic Visits**

<table>
<thead>
<tr>
<th></th>
<th>% Av.</th>
<th>Tot.Dom</th>
<th>Adl.</th>
<th>Oth SA</th>
<th>Vic</th>
<th>NSW</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Inc. pa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1985/86</td>
<td>73,000</td>
<td>28,000</td>
<td>12,000</td>
<td>13,000</td>
<td>11,000</td>
<td>9,000</td>
<td></td>
</tr>
<tr>
<td>1986/87</td>
<td>103,000</td>
<td>25,000</td>
<td>21,000</td>
<td>17,000</td>
<td>21,000</td>
<td>19,000</td>
<td></td>
</tr>
<tr>
<td>1987/88</td>
<td>103,000</td>
<td>29,000</td>
<td>18,000</td>
<td>23,000</td>
<td>16,000</td>
<td>17,000</td>
<td></td>
</tr>
<tr>
<td>1988/89</td>
<td>130,000</td>
<td>31,000</td>
<td>29,000</td>
<td>19,000</td>
<td>19,000</td>
<td>11,000</td>
<td></td>
</tr>
<tr>
<td>1989/90</td>
<td>130,000</td>
<td>69,000</td>
<td>19,000</td>
<td>17,000</td>
<td>20,000</td>
<td>11,000</td>
<td></td>
</tr>
<tr>
<td>1990/91</td>
<td>143,000</td>
<td>32,750</td>
<td>17,250</td>
<td>57,195</td>
<td>18,414</td>
<td>17,391</td>
<td></td>
</tr>
<tr>
<td>1991/92</td>
<td>143,000</td>
<td>48,804</td>
<td>34,196</td>
<td>44,116</td>
<td>17,794</td>
<td>20,090</td>
<td></td>
</tr>
<tr>
<td>1992/93</td>
<td>130,000</td>
<td>35,624</td>
<td>25,376</td>
<td>41,193</td>
<td>16,698</td>
<td>11,109</td>
<td></td>
</tr>
</tbody>
</table>

Average growth pa.

Over 7 years 8.6%

Note: The statistics for visits exclude “day trippers” ie. those just passing through, and therefore only include those staying overnight for one or more nights.

Of the 130,000 domestic tourists visiting in 1992/93, 27% came from Adelaide, 20% from other parts of South Australia, 32% from Victoria and 13% from New South Wales.

**Far North Number of Visitor Nights**

<table>
<thead>
<tr>
<th></th>
<th>% Av.</th>
<th>Tot.Dom</th>
<th>Adl.</th>
<th>Oth SA</th>
<th>Vic</th>
<th>NSW</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Inc. pa</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1985/86</td>
<td>288,000</td>
<td>179,000</td>
<td>57,000</td>
<td>19,000</td>
<td>15,000</td>
<td>18,000</td>
<td></td>
</tr>
<tr>
<td>1986/87</td>
<td>375,000</td>
<td>180,000</td>
<td>88,000</td>
<td>19,000</td>
<td>69,000</td>
<td>19,000</td>
<td></td>
</tr>
<tr>
<td>1987/88</td>
<td>536,000</td>
<td>234,000</td>
<td>103,000</td>
<td>117,000</td>
<td>33,000</td>
<td>49,000</td>
<td></td>
</tr>
<tr>
<td>1988/89</td>
<td>471,000</td>
<td>132,000</td>
<td>187,000</td>
<td>93,000</td>
<td>27,000</td>
<td>32,000</td>
<td></td>
</tr>
<tr>
<td>1989/90</td>
<td>646,000</td>
<td>241,000</td>
<td>141,000</td>
<td>63,000</td>
<td>130,000</td>
<td>71,000</td>
<td></td>
</tr>
<tr>
<td>1990/91</td>
<td>368,200</td>
<td>106,110</td>
<td>55,890</td>
<td>126,690</td>
<td>40,988</td>
<td>38,522</td>
<td></td>
</tr>
<tr>
<td>1991/92</td>
<td>516,000</td>
<td>163,464</td>
<td>114,536</td>
<td>128,044</td>
<td>51,646</td>
<td>58,310</td>
<td></td>
</tr>
<tr>
<td>1992/93</td>
<td>451,000</td>
<td>135,488</td>
<td>96,512</td>
<td>130,743</td>
<td>52,998</td>
<td>35,259</td>
<td></td>
</tr>
</tbody>
</table>

Average growth pa.

Over 7 years 10.5%
5.3 Overseas visitation

Overseas visitation to the Far North (the Outback) has also grown significantly:

<table>
<thead>
<tr>
<th>Year</th>
<th>No. of Visits</th>
<th>% Av.</th>
<th>No. of Visitor</th>
<th>% Av.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1985</td>
<td>8,400</td>
<td></td>
<td>27,000</td>
<td></td>
</tr>
<tr>
<td>1986</td>
<td>14,800</td>
<td>76.2%</td>
<td>31,000</td>
<td>14.8%</td>
</tr>
<tr>
<td>1987</td>
<td>22,000 (est)</td>
<td>61.8%</td>
<td>32,000 (est)</td>
<td>8.9%</td>
</tr>
<tr>
<td>1988</td>
<td>28,900</td>
<td>51.0%</td>
<td>33,000</td>
<td>6.9%</td>
</tr>
<tr>
<td>1989</td>
<td>45,200</td>
<td>52.3%</td>
<td>101,000</td>
<td>39.1%</td>
</tr>
<tr>
<td>1990</td>
<td>42,100</td>
<td>38.0%</td>
<td>120,000</td>
<td>34.8%</td>
</tr>
<tr>
<td>1991</td>
<td>39,800</td>
<td>29.5%</td>
<td>173,000</td>
<td>36.3%</td>
</tr>
<tr>
<td>1992</td>
<td>39,600</td>
<td>24.8%</td>
<td>181,650</td>
<td>31.3%</td>
</tr>
<tr>
<td>Average 7 years:</td>
<td></td>
<td>24.8%</td>
<td>31.3%</td>
<td></td>
</tr>
</tbody>
</table>

Note: The statistics for visits exclude “day trippers” ie. those just passing through, and therefore only include those staying overnight for one or more nights.

5.4 Coober Pedy Share of Far North Visitation

When we compare the Far North and Coober Pedy visitation statistics, we are able to form conclusions about market share. When we compare the 1988/89 figure of 130,000 domestic tourists visiting the Far North with the 50,000 visiting Coober Pedy the market share percentage is 38%. In 1992/93 the relevant figures are 175,000 Far North visits and 37,000 for Coober Pedy making a market share of Far North visitation at 21%. Care should be taken however by placing too much reliance on the year by year figures when making comparisons. A more reliable conclusion would be to say that over those years an indicative range of 25-35% might be appropriate.

5.5 Survey preferences

Tourism South Australia reports that in a recent sample survey 45% of 191 respondents who visited the Far North (without going to the Flinders Ranges) said that Coober Pedy provided the greatest interest of all Far North attractions. Another group of 230 separate respondents who visited both the Far North and the Flinders Ranges rated Coober Pedy at 27% compared with Wilpena Pound 39%. The next highest ratings for this group were Dalhousie Springs / Mt Dare, Lake Eyre, Oodnadatta Track with 11% - 12% each.

In the overall survey of 757 respondents (which included the 191 and 230 respondents mentioned above as well as 336 who only went to the Flinders Ranges), Coober Pedy rated 20% compared with Wilpena 31%, confirming that it has considerable pulling power.
6. FUTURE POTENTIAL

There is considerable potential to develop domestic tourism visitation to Coober Pedy particularly when the State’s promotional strategy emphasising Adelaide as a gateway to the Outback picks up pace and when Aboriginal tourism and ecotourism are more strongly promoted.

Furthermore, there should be a major campaign to increase length of stay by providing stronger attractions and more activities for tourists. Whilst in 1989 Coober Pedy had 38% of Far North visits, it only had 30% of Far North visitor nights. The average night’s stay in Coober Pedy in 1988/89 was 2.9 nights compared with Adelaide 4.2, Glenelg 5.8 and Pt Lincoln 6.8. By 1992/93 the average nights had fallen to 1.97 (37,000 visits to Coober Pedy compared with 73,000 visitor nights) again, underlining the need for a major campaign to reverse this situation (providing the figures are right) and increase the average nights stay to at least 3.0.

Target marketing for Coober Pedy should also include rail passengers enjoying the Ghan Experience. With improved infrastructure at the siding near Mabel Creek Station, improved tourism transport to Coober Pedy, co-operation from Australian National and co-ordinated development and promotion, many more tourists could gain a combined mining town experience along with authentic Aboriginal contact at Mabel Creek Station. Uluru and Alice Springs do not offer a mining experience whereas Coober Pedy does.

There has been strong growth in international tourism in Australia in recent years and the Bureau of Tourism Research is forecasting an average 8% pa. growth to the year 2000. This rate of growth is lower than that experienced in recent years due to a world economic slow-down, escalating Australian travel costs and the absence of key events. Japan is a strong growth market since Australia only attracts 4% of all Japanese travellers, but their average stay is only 5 nights. Coober Pedy would need to tap a longer staying segment of this market to benefit from the strong growth expected from Japan.

The outlook for S.A. tourism activity over the next 10 years is promising. International visitation will continue to increase with improved air accessibility, new product, increased awareness and continued marketing overseas.

Whilst there are some very healthy signs suggesting strong growth there will obviously be limits and constraints to growth, not the least of which will be the carrying capacity of the Coober Pedy township and surrounding environs. The Far North also suffers from the normal problems of distance and lack of facilities. In some towns there are inadequate facilities for tourists, e.g. conveniences, communication and shopping and there is a need for higher standards.
There is a need to improve tourism resources, the quality of visitor experience and length of stay, not only for first time visitors, but also for repeat visitors. This will require an intensified marketing effort to selected target markets, particularly to raise the level of awareness with prospective tourists.

There is also a need to improve marketing planning at the grass roots level, particularly through co-operative activity in planning, product development and promotion.

Also on the downside, Australian economic conditions may tend to dampen tourism and S.A. will have to fight harder to win the domestic tourism dollar in an increasingly competitive market. The key is to provide tourism product and services that match consumer needs.

Market research needs to be intensified to ensure that operators understand the main markets and translate tourist needs and preferences into saleable product, without impairing the existing character of the product which is serving so well to attract tourists.

The Coober Pedy product has a good fit with the S.A. tourism product strategy. This strategy emphasises priority themes, particularly experiences that are natural and adventurous, and which provide learning experiences and opportunities to see wildlife in its natural habitat. Coober Pedy should be able to build on its existing strength as a “top of mind” attraction for visitor generation.

7. FORECASTS

7.1 Disclaimer

The information contained in these forecasts is provided in good faith and is derived from sources believed to be reliable and accurate. Readers of this report are advised that the author does not accept any liability for these forecasts. The statements contained herein are of a preliminary nature and are subject to market fluctuations, both nationally and internationally, as well as the capability of tourism operators to effectively manage their operations.

7.2 Far North Forecasting Assumptions

Great care should be taken in forecasts and the following figures are preliminary estimates based more on arithmetical projection rather than a fundamental study of supply and demand which would be necessary for a more reliable study.

Attached are some calculations suggesting what we consider are to be reasonable projections based on the following assumptions:
that the average rate of growth over the last 7 years (1986/93) period will be sustained due to the product strength and market attractiveness of Coober Pedy and the Far North;

normal business cycle activity is excluded;

that Coober Pedy and the Far North will be able to manage the growth and provide a carrying capacity in terms of infrastructure, community acceptance and complementary product;

increased room occupancy but constant length of stay (say 2.5 nights).

7.3 Far North Forecasts

Our projections for the Far North region are as follows:

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td><strong>No. of visits</strong></td>
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<tr>
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<td><strong>No. of visitor nights</strong></td>
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<tr>
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<td>451,000</td>
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<tr>
<td><strong>Total</strong></td>
<td>632,650</td>
<td>826,000</td>
<td>1,928,000</td>
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</table>

We have assumed that the current level of occupancy of 36% will increase. We have allowed for a 2% increase per annum starting at 40% occupancy for 1994. We have also allowed for the average rate of growth for the last 7 years for room nights sold to be sustained at 7.6%. The existing number of rooms is 363 and we expect this will be sustained through to 1995 whilst occupancies rise to 42%.

These forecasts have been prepared on the basis of sustaining the average rate of growth for the last 7 years through until the end of the century without any allowance for business cycle activity or any other variables. Extreme care should be taken with their interpretation and use. In our opinion, however, they can be used as a basis for preparing an optimistic forecast for Coober Pedy tourism.
A more fundamental study of supply and demand variables would be required in order to produce more reliable forecasts for major investment decision making, e.g. for new hotels, airports, etc. Such a study should also include a longer history of visitation statistics and comparisons with similar locations. The key question is “Where are we on the product life-cycle?”. We suspect that the Far North is about to enter a period of higher growth because of its fit with the State’s tourism strategy / promotional campaigns and the strong world trends towards ecotourism.
7.4 Coober Pedy Forecasts

We do not consider the Coober Pedy statistics to be reliable enough for forecasting purposes. Rather, we would prefer to work on the basis of the Far North statistics and projections using estimates for market share of Coober Pedy to total Far North. Our estimates are as follows:

<table>
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<tr>
<th></th>
<th>Current Position</th>
<th>1995</th>
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<tbody>
<tr>
<td></td>
<td>1992/93</td>
<td>Total</td>
</tr>
<tr>
<td><strong>Total</strong></td>
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<tr>
<td>Total</td>
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<tr>
<td>Assume 25% Share of Far North</td>
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<td>54,000</td>
</tr>
<tr>
<td>Assume 30% Share of Far North</td>
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<td>Assume 35% Share of Far North</td>
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<tr>
<td><strong>No. of Visitor Nights</strong></td>
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</tr>
<tr>
<td>Domestic</td>
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<tr>
<td>International</td>
<td>say 20,000</td>
<td></td>
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<tr>
<td>Total</td>
<td>150,000</td>
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</tr>
<tr>
<td>Assume 25% Share of Far North</td>
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<tr>
<td>Assume 30% Share of Far North</td>
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<tr>
<td>Assume 35% Share of Far North</td>
<td>675,000</td>
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<tr>
<td><strong>No. of Room Nights Sold</strong></td>
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<tr>
<td>Assume 25% Share of Far North</td>
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<td>Assume 30% Share of Far North</td>
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<tr>
<td>Assume 35% Share of Far North</td>
<td>28,000</td>
<td>19,000</td>
</tr>
</tbody>
</table>

Our major conclusion is that there is a distinct chance that, based on visitation rates experienced over the last 7 years, visitation could **double** in Coober Pedy by the Year 2000.

These statistics are only for visits staying overnight. Overseas day tripper visitation would be additional. In the current position for 1992/93 we have estimated overseas visitors overnighting at 10,000 based on a 25% share of 1992 overnighters 39,600. Remember that the International Visitor Survey (IVS) shows that 40,000-60,000
overseas visitors include Coober Pedy on their itinerary; this is equivalent to the total number of domestic visitors. Very few of the domestic visitors will pass through without staying overnight. We can conclude therefore that for every one overseas visitor staying overnight possibly five are passing through. This represents an excellent target market opportunity through a combination of improved product development and promotion. In short, the tourism outlook for Coober Pedy through to the end of the century is bright.
A DISCUSSION ABOUT GOALS

1. NATIONAL GOALS - USA


- Economic
  - full employment
  - economic growth with minimum inflation
  - reduced international trade deficits
  - balanced national transportation system

- Energy
  - energy conservation
  - economic viability of small business

- Social
  - urban re-vitalisation
  - consumer protection
  - equal opportunity
  - improved physical and mental health
  - equitable taxation

- Government
  - improved operation of the Federal Government
  - minimum regulation of private industry

- Environment
  - environmental protection
  - judicious use of natural resources
  - preservation of national heritage resources

- International
• improved international goodwill

1. TOURISM GOALS - USA


Against this backdrop of national interests tourism goals can be developed along four lines: - economic, consumer, national resource/environmental and government operations.

• Economic
  • optimise the contribution of tourism and recreation to economic prosperity
  • full employment
  • regional economic development
  • improved international balance of payments.

• Consumer
  • opportunity and benefits of travel and recreation accessible to residents and visitors
  • to contribute to the personal growth and education of the population and to encourage their appreciation of the geography, history and ethnic diversity of the nation
  • to encourage free and welcome entry of foreigners.

• Environmental and National Resource
  • to protect and preserve the historical and cultural foundations of the nation as a living part of community life and development and to ensure future generations have an opportunity to enjoy the rich heritage of the nation
  • to ensure the compatibility of tourism, recreational and activity policies with other national interests in energy, environment and judicious use of natural resources.

• Government Operations
  • harmonise Federal activities supporting tourism and recreation
  • support public and the public and private sector, leadership role.

3. NATIONAL TOURISM GOALS - AUSTRALIA

Source: DASETT, 1991
• Economic
  To optimise the tourism industry’s contribution to national income, employment, growth and the balance of payments by creating a favourable environment for industry development

• Environmental
  To provide for sustainable tourism development by encouraging responsible planning and management practices consistent with the conservation of our natural and cultural heritage

• Social
  To enhance access to quality tourism experiences and ensure favourable social outcomes of tourism by diversifying the product base, raising industry standards and protecting the public interest

• Support
  To ensure the provision of adequate promotional, planning, co-ordination, research and statistical support to assist the industry’s development.

3. UNITED NATIONS

UN Conference on the human environment listed 4 quality of life needs:

• Improvement of human settlements and health

• Development and use of fresh water, land and energy resources.

• Harmonising development goals and social and cultural values with environmental quality objectives

• Protection of living resources and of the ocean, and avoidance of inadvertent climate modification.

5. THE CHASE FOR COMPETITIVE ADVANTAGE

Source: Michael Porter, "The Competitive Advantage of Nations" (Free Press).

• Porter says that nations exist to give their peoples a rising standard of living. This depends above all on continual gains in productivity provided only by individual firms that search constantly for fresh sources of competitive advantage

• Contrast Michael Porter's approach with a traditional economic view that comparative advantage is essentially tied up with the idea that a nation's wealth depends on it's ability to exploit natural or human resources of which it has a relative abundance. In Australia's case the lucky country post war strategy emphasised agriculture, mining, etc.
Porter, however, argues that comparative advantage is not something inherited, it is created. In his 4 year study of 8 countries: the US, Japan, Sweden, Switzerland, West Germany, Britain, Italy and South Korea, Porter concluded that a nation's international success depends upon its ability to upgrade its advantages to the next level of technology and productivity. He argues that Japan's success is not due to its management or government planning but mostly to intense domestic competition in its export industries. He argues that the fundamental lesson for nations is that the quiet life is an enemy of competitive advantage.

Porter says Japan is the nation best prepared to compete in the global economy. The answer is to create competition.

6. ALTERNATIVE VALUE SYSTEMS OR WORLD VIEWS

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<tr>
<th>Focus</th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
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<td>HI-TECH</td>
<td>LO-TECH</td>
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</tr>
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</table>

1. ECONOMY

- Core Values: Consumption
- Conservation: Quantity
- Quality: Limited
- Product Life: Long
- Production: Scale Mass
- Craft (small is beautiful): Factory
- Stored: World Wide
- Trade: Bartering
- Growth: High
- Steady state: Capital
- Labour: intensive
- Investment: High
- Unemployment: Nil

2. ECOLOGY

- Management: Ineffective
- Effective: Energy use: High
- Low: Pollution: High
- Low: Re-cycling: Little or none
- High: Concern for Nature: Alienated
- Integrated: Science & Technology: Dominating
- Serving:...

3. COMMUNITY

Settlement: City
Village: Family
Family: Scattered
<table>
<thead>
<tr>
<th>Communal Culture</th>
<th>Disintegrating</th>
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<tr>
<td>Preserved</td>
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<tr>
<td>Motivation to work</td>
<td>Income</td>
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<tr>
<td>Satisfaction</td>
<td></td>
</tr>
<tr>
<td>Dependence on others</td>
<td>High</td>
</tr>
<tr>
<td>Self sufficient</td>
<td></td>
</tr>
<tr>
<td>Recreation</td>
<td>Separated</td>
</tr>
<tr>
<td>Integrated with work</td>
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</table>

4. GOVERNMENT

Politics
Democratic
Consensus
Organisation
Centralised
Decentralised

5. PLANNING & DECISION-MAKING

Simple
Complex
Multi-Disciplinary
Common Sense
Relative/Pragmatic
Stable/Principled

HANDOUT 1.5a

AN ORGANISATIONAL SWOT EXAMPLE

Strengths

- Strong capability for servicing the seniors market (80% rating compared to Competitor A 65%)

- Locational advantages provide an opportunity to build image

Weaknesses

- Poor networking arrangements which leave us vulnerable to industry rationalisation

- No CEO succession plan

Opportunities
• Aging population offers opportunity to build on strength in products for senior citizens

• **Threats**

  • Declining household formation threatens appliance demand

•
The purpose of this SWOT analysis is to identify key factors for success relevant to site selection and the definition and evaluation of alternative development concepts. For example an understanding of ‘strengths’ for an area will help ensure that a proposed development builds on these strengths and will be in harmony with the unique character for the area under consideration.

**A hypothetical country town called Powelltown, South Australia**

**Strengths**
- Located within a short driving distance of Adelaide (less than 45 minutes) and close to the McLaren Vale winery area;
- Situated on high traffic routes to other tourist destinations in the Fleurieu Peninsula - leads to a concept of ‘Gateway to the Fleurieu’;
- An appealing township countryside which provides a sense of arrival, within a forested surrounding which displays seasonal contrast;
- A name which is easy to use in promotional activity eg ‘everything points to, ‘hub concept for attractions in all directions’, and already has high awareness;
- Existing township facilities and nearby tourism attractions;
- A close-knit and supportive local community;
- Substantial existing businesses and a diverse agricultural base;
- Strong Mt Lofty Ranges and water catchment area planning.

**Weaknesses**
- Township currently lacks a cohesive tourism identity - a fragmented collection of attractions in a region you drive through on the way to somewhere else;
- Competing with established tourism destinations within the region eg Victor Harbor, Goolwa, McLaren Vale.

**Opportunities**
- Expanding population base in the southern areas of Adelaide;
- Located adjacent to planned major developments ie the proposed Southern Freeway, Wirrina Cove redevelopment;
- Tie together the existing attraction base;
- To become a centre for the promotion of farm based tourism in the region;
- Link in with current tourism activity in the McLaren Vale and Fleurieu Peninsula areas;
- Capitalise on road alignment for better town and attraction signage;
- The potential for an appropriate major tourism attraction for Powelltown on the basis of the size of the existing tourism flows to the Fleurieu Peninsula and the traffic flows through Powelltown.

**Threats**
- Loss of quaint township character through poor urban planning and uncoordinated development.
INTEGRATED SWOT EXAMPLE
HANDOUT 1.5c

Situation analysis conclusions:-

- From the demographic analysis
  - Longer life expectancies might mean more new product opportunities in the senior citizen segment (opportunity)
  - A lower birth or household formation rate will eventually lead to lower new home building and appliance demand (threat)

- From the supply and competitive analysis
  - There is a risk of new firms entering the industry or of existing firms combining and rationalising (threat and an opportunity)

- From the demand analysis
  - Our markets were declining or that we are vulnerable to substitute products (threats)

- In the financial analysis we may have concluded that
  - borrowing capacity (strength)
  - credit management (strength)
  - liquidity and profitability (weaknesses)
  - planning and budgeting processes (weaknesses)

- In the organisational analysis we might have concluded that
  - Strong capability for serving the senior citizens market (strength)
  - Locational advantages provide an opportunity to build image (strength)
  - Strong distribution channels (strength)
  - Poor networking arrangements which leave us vulnerable to industry rationalisation (weakness)
  - No CEO succession plan (weakness)
## DESTINATION RATING PROFILE

<table>
<thead>
<tr>
<th>FACTOR</th>
<th>WEIGHT</th>
<th>RATING</th>
<th>WEIGHTED SCORE</th>
</tr>
</thead>
<tbody>
<tr>
<td>(factors without weights need not be listed)</td>
<td></td>
<td>(out of 10)</td>
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<tr>
<td><strong>PRODUCT</strong></td>
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<td>Advertising &amp; promotion</td>
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## DESTINATION RATING PROFILE

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• LINKED SWOT EXAMPLE

A tourist example to illustrate linking strengths and weaknesses with opportunities and threats

• Rationale for concentrating on visitation to Adelaide
  
  • Strengths - our town is easily accessible to Adelaide, we have a pleasant farming environment, good beaches and we are price competitive

  • Opportunities - visitation to Adelaide is growing strongly, government promotional support is available, investment in major tourist developments is occurring in the region, growing interest in farm-based holidays and adventure

• We will focus on the short-trip market
  
  • Strengths - accessibility, strong product line for places of interest (scenic features, museums, old mines)

  • Threats - cost of petrol is increasing, consumer preference to divide total holiday time into more short trips

• We need a major magnet in the town
  
  • Strengths - existing town character and community retail support, strong product line of support businesses

  • Threats - potential new investment in an adjoining region will shift the centre of gravity away from our region

  • Opportunities - strong short trip support for unique theme developments
EXAMINATION - WAGON’S HO!

A well known media personality, Mick Dundee, has regular “bush tucker” spots on a TV travel show. He has developed a strong personal following and there have even been some “feelers” for his involvement in overseas TV through some large networks.

One of his dreams however has always been to lead outback horse and wagon adventure tours. He is able to gain exclusive access (in return for a 5% royalty) to aboriginal lands through a childhood aboriginal friend who is now chairman of the community council. The area contains not only the most remote aboriginal settlements in Australia which are still involved in traditional hunting and food-gathering, but also the most beautiful country with majestic mountain ranges, wide rock-strewn river-beds, deep billabongs and lush semi-tropical vegetation. Fortunately a network of old tracks exists to the major spots of interest as a result of past mining activities.

Mick approached you for some ideas. You are a tourism consultant and your first step was to summarise (after much discussion) the product concept, which now follows.

Wagons Ho! Is to provide a soft adventure holiday using four-wheeled wagons, each pulled by two Clydesdale horses. Each wagon would carry four adult passengers or two adults and three children plus driver. Each wagon would be fully equipped with quality camping equipment to provide maximum comfort and enjoyment.

The wagon concept would provide a new way to experience the Australian bush and capture the pioneering spirit as families and/or groups trek leisurely along bush tracks, through forests and over grassy open spaces at a pace slow enough to relax and really experience the natural beauty of the Australian environment.

Groups would leave on a Friday night from a country town base, travel via 4 wheel drive coach to the “The Homestead” (a restored shearing shed and shearers quarters built in the 1860s) and overnight there. Next morning the wagons would be hitched up (with everyone taking part) together with a string of horses for those that want to tag-along or to combine horse-riding with wagon travel.

From there to “Dreaming Rocks”, about 14 kilometres away, along a track that follows and regularly crosses a river-bed. The river flows for about 6 months of the year but is normally low enough to cross. This is excellent camping country and well off the beaten tourist track. Next day the wagons trek to “Billy Goat Lagoon” to camp, finishing up mid to late afternoon in plenty of time for traditional campfire ceremonies involving aboriginals at a nearby camp.

Arrangements are in place to use local aboriginal custodians as tour guides for the extended treks through a Conservation Park for up to five days. These venture up to 20 kilometres into the Park, which consists of rocky ridges, fertile valleys with large red gums and golden wattles. Camping within the confines of the Park had been arranged at Stags Camp, an outback oasis. There is a short climb to the top of Goose Hill for a magnificent view of the surrounding countryside and an old chrysoprase mining site.

Prepare a short management report summarising what the consultant’s next product development steps might be.