TiCSA
Business Plan
2023/24

Contents

1.   Introduction

The Tourism Industry Council South Australia (TiCSA) is a not-for-profit, member-based industry association with over 1100 members.

The following document sets out our Business Plan for the 2023-24 Financial Year, setting out how we will continue to deliver on our organisation's Strategic Plan.

This plan has a strong focus on growing and evolving TiCSA as an organisation.

1.1   Our Strategic Plan

Our Vision

A strong and valued voice for South Australia's tourism industry.

Our Purpose

Building capabilities, advocating for, and bringing together South Australia's diverse tourism industry to enable a sustainable and growing visitor economy.

Our Strategic Intent

Over the next four years, TiCSA will focus on developing coherence and mutuality across the tourism industry as a whole so that:

- South Australian tourism businesses are more empowered to build capability for their own wellbeing and prosperity.
- We can further influence and partner with all levels of government.

This will be achieved by:

- Positioning TiCSA as being for the industry overall, not just for members.
- Evolving membership to reflect how industry wants to engage with us.
- Continuing to build the TiCSA community.
- Partnering and collaborating with other industries and sectors that contribute to visitor economy outcomes.

Strategic Pillars

- The Value of TiCSA
- Industry Supporting Industry
- Government Influence
- Sustainability & Governance

1.2   State of the Industry

Visitor expenditure in South Australia has now exceeded pre-COVID levels, growing to a record-breaking $9.9 billion in the year ending June 2023.

For the year ending June 2023, domestic overnight visitors spent $6.69 billion and international visitors spent $1.01 billion totalling $7.70 billion or $21.09 million per day.

There are 20,203 tourism-related businesses in South Australia. 96% of these are classified as small businesses, employing fewer than 20 persons. Tourism directly accounts for 34,000 (or 3.4%) jobs, and indirectly accounts for 16,700, or in total 5.1%, of employment statewide.

Tourism is resuming its long-term growth path following significant COVID-19 setbacks in recent years, including stronger tourism demand. Recent visitation data has shown a considerable rebound of interstate and international travellers to South Australia over the past year.

While the tourism industry in South Australia appears to no longer be significantly affected by COVID-19, many other challenges persist. The April – June 2023 TiCSA Tourism Barometer readings were down across the board, showing the cumulative impact of an environment of rising business costs, workforce issues including staff attraction and retention, and a weakened economy.

Despite this, more respondents were feeling either 'confident' or 'extremely confident' about business prospects for the next 12 months, 47.7% of all respondents.

1.3   SWOT Analysis

INTERNAL FACTORS	
STRENGTHS (+)	**WEAKNESSES (-)**
1. TiCSA's advocacy work positions us as the peak industry body. 2. Current relationship with Minister/ Premier and their office. 3. Relationships with SATC, DEW, DIIS, and Department for Education. 4. Strong leadership (internally / external), CEO for his leadership positioning within the industry, built over the last seven + years, well-connected, established and regarded. 5. Strong voice that the tourism industry trust. 6. People and culture of TiCSA team. 7. Collaboration and partnerships with other industry groups. 8. Membership numbers – consistency, spread across all sectors and regions. 9. Corporate partnerships and event sponsorships – significant growth opportunity. 10. Industry recognition - real rapport, organisation held in high regard. 11. Past and current staff ambassadors of TiCSA as a result of their professional development from the business	1. Budget - limited financial resources constrains activities. 2. Ability to influence ATIC on continuous improvement of programs. 3. Dependence on government funding. 4. Confusion of role between the SATC and TiCSA. 5. Small team high output consequently leading to staff burnout. 6. Limited downtime for deep / strategic thinking. 7. Spending resources on short-term programs that don't deliver productive outcomes for the business. 8. Limited staff resourcing to complete tasks to high quality.

EXTERNAL FACTORS	
OPPORTUNITIES (+)	**THREATS (-)**
1. Tourism as an economic priority for all governments. 2. Advocate to RTOs and Local Governments looking for program and financial multi-year partnerships. 3. Improving membership value for medium and large enterprises via business development programs. 4. Establish market share as a key KPI for the SATC. 5. Grow membership – for relevance and sustainability. 6. Collaboration with research firms to get access to up to date consumer research, better data collection and insights. 7. Even greater policy involvement with the government of the day. 8. Develop appropriate and quality member resources (portal) to support industry. 9. Enabling the industry by providing a platform for collaboration and business development. 10. Develop TiCSA's ability to deliver hybrid events (online and in person) where feasible. 11. Long-term training program and focused topics to avoid duplication. 12. Driving engagement to TiCSA in region activities. 13. TiCSA's visibility in region - technology improved this factor and it should be maintained. 14. Member engagement in business development programs. 15. Workshops - well recognised and elevated regional presence, facilitating peer engagement and bringing industry together. 16. Significant media exposure - increased brand awareness and profile for organisation. 17. Continuous improvement to QTAB for longevity and value to industry 18. Fostering strong relationships with contract trainers.	1. Government funding reduction constraining industry support. 2. Membership revenue at risk for the next 12-24 months. 3. Ability for operators to recover from disruptions to their business' quickly, including reduced industry capacity (time/finances). 4. Professionalism of the industry – delivering the marketing promise. 5. Rising of business costs to members putting pressure on membership funding. 6. Business costs increasing for TiCSA, particularly impacting workshops. 7. Perceptions of QTAB, Stars, Tourism Awards underpin membership value proposition. 8. Increasing number of tourism training providers operating in South Australia independently of TiCSA. 9. ATEC, Ecotourism Australia, and other peak tourism bodies offering accreditation programs and niche modules, creating confusion for industry and impacting perceptions about QTAB. 10. Increasing preference for online review star ratings by businesses, consumers and use by SATC on southaustralia.com.

2.   How We Work

2.1   Our Governance

The Board of TiCSA is responsible for the strategic vision of the organisation and has the authority to determine the policy and directions of the organisation.

In line with good governance principles, the TiCSA Board is structured to reflect the need for independence, transparency and flexibility. The Board consists of up to nine Board Members (include the Chair) with a minimum of five. Up to six of these Board Members are elected and up to three are appointed to fill competency gaps.

The TiCSA Board has three sub-committees:

1. *Governance Committee*

2. *Business Development and Finance Committee*

3. *Advocacy Committee*

2.2   Our Operations

The TiCSA staff team currently consists of 8 Full-Time Employees (FTEs) – a small team that delivers significant industry focused activities and outcomes. Ensuring the team works to its potential for the good of our members and the broader industry is fundamental to future state-wide success.

The TiCSA team consists of nine committed, engaged employees, most of which are long-term. These include:
- Chief Executive Officer
- Membership & Business Operations Manager (0.8 FTE)
- Program Development Manager
- Partnerships & Policy Manager (0.8 FTE)
- Industry Programs Executive
- Communications Coordinator
- Industry Development Coordinator (0.8 FTE)
- Industry Engagement & Events Coordinator
- Membership & Administration Coordinator (0.6 FTE)

Giving back is an important value for the organisation. A key element of this is delivering a strong intern program, providing an opportunity for students to professionally develop, whilst also supporting business operations, particularly around event activations.

Continuous development in strengthening people and culture is a top priority for TiCSA. These areas are reported on by the CEO at each Board meeting, discussed at monthly management group meetings, individual line-manager meetings and professional development reviews.

2.3 Our Performance

The establishment and sustainment of strong partnerships provide an operational environment that delivers commercial and organisational effectiveness. The TiCSA staff and Board measure and monitor the following areas with specific targets annually:

- Membership revenue
- Membership numbers
- Sponsorship revenue
- Total revenue
- Net profit
- Liquidity
- Aged receivables by months and percentage of income owing

Staff will provide a baseline measurement for each of these and propose a target to be achieved within a specified timeframe. The Board will consider and endorse those targets.

TiCSA takes the performance of all its staff and Board members seriously to ensure the delivery of the best possible outcomes for our members and the industry at large.

Several annual processes are undertaken, these include:

- Review of Board effectiveness – undertaken by the Chair of the Governance Committee
- Review of Board members – undertaken by the Chair
- Review of Chair – undertaken by Deputy Chair
- Review of CEO – undertaken by the Chair; and
- Review of staff – undertaken by the CEO and direct line managers.

2.4 Our Partnerships

TiCSA recognises that our success will only be as strong as the partnerships we create across government and the broader Visitor Economy. Tourism is an extremely important driver of our state's economy, driving benefit that flows to regional communities and across a multitude of industries including retail, hospitality, agriculture, food and wine, education, real estate and transport.

There has been a strong historical collaboration between industry and government at all levels, particularly with the South Australian Tourism Commission (SATC). In recent times this has broadened across the whole of State Government, including the Department for Industry, Innovation and Science (DIIS), the Department for Environment and Water (DEW), Department for Education, and Arts South Australia. We also have a strong working relationship with the Minister for Tourism, her office and the Office of the Premier.

Partnerships are critical for our state to achieve its tourism potential. Collaborative and coordinated investment from government is required to support the strong investment industry continues to put forward towards product development and marketing. The other key reason partnerships are so important is because our sector delivers economic returns across the state, much of which is export dollars. Unlike other export industries where goods and services are sent to overseas markets, tourism sees the consumer come to the goods and services. Business and destination service delivery is critical and with over 99 per cent of our state's tourism businesses being small to medium-sized enterprises (SMEs), the challenge cannot be overstated.

The following is a snapshot of breadth of organisations that TiCSA currently collaborates with:

- Australian Tourism Industry Council (ATIC) and each state/territory TICs
- Premier / Minister for Tourism
- Government agencies / departments:
  - South Australian Tourism Commission (SATC)
  - Department for Environment and Water (DEW)
  - Arts South Australia
  - Department for Industry, Innovation and Science (DIIS)
  - Department for Education
  - Department of Premier & Cabinet
- SA Visitor Information Centre Network (SAVICN)
- Local Government Association (LGA) and Local Governments across the state
- Regional Tourism Organisations

Additionally, to lead collaboration across the state's visitor economy, TiCSA convenes the Visitor Economy Coalition (VEC) up to four times a year, to enable key industry bodies across the South Australian visitor economy to discuss state-wide and national issues of significance. Current membership includes:

- Business Events Adelaide;
- Australian Tourism Export Council – SA Branch;
- Australian Hotels Association – SA Branch;
- Backpackers SA;
- Boating Industry Association;
- Bus and Coach Association SA;
- Business SA;
- Caravan and Camping Industry Association SA;
- Festival City Adelaide;
- Food South Australia;
- Houseboat Hirers Association;
- Restaurant and Catering Industry Association of Australia;
- SA Parks – the Caravan Parks Association of SA;
- Study Adelaide;
- SA Visitor Information Centre Network;
- South Australian Wine Industry Association;
- Taxi Council SA;
- Tourism Accommodation Australia – SA Branch; and
- Tourism Industry Council

3. Action Plan

Actions are aligned to the strategic pillars outlined in the TiCSA Strategic Plan 2023-26

ACTION		STRATEGIC PILLARS
1.	Review and update advocacy priorities.	3.1, 3.5
2.	Deliver and evolve the barometer.	3.2, 3.5
3.	Represent industry providing data and industry insights to government through upholding SA Government and TiCSA agreement.	3.3
4.	Build and execute the annual series of Leadership Luncheons.	3.6
5.	Continue to forge and foster strong stakeholder relationships and collaborations.	3.3
6.	Orchestrate annual summit policy breakfast event.	3.6
7.	Deliver the QTF – *Quality Tourism Accredited Business* (QTAB) program and *Star Rating* program.	1.4, 1.5
8.	Delivery of the QTF - *Visitor Information Centre (VIC) accreditation.*	1.4, 1.5
9.	Drive Nominations for the 2024 SA Tourism Awards.	1.5
	Support high quality Award entries and comprehensive judging program to 2023 SA Tourism Awards program.	1.3, 1.4, 1.5, 2.1
	Choreograph the 2023 SA Tourism Awards Gala Dinner.	1.3, 2.6
10.	Optimize the 2024 Top Tourism Town program.	1.4, 1.5
11.	Advance workshop and webinar business capability program to deliver over and above SA Government funding agreement.	1.2, 1.3, 1.6
12.	Execute 2nd year Careers in Tourism program in line with project plan and SA Government funding agreement.	2.1, 2.9
13.	Stage the annual State Tourism Conference.	1.2, 1.3, 2.6
14.	Secure and deliver bespoke partner business capability programs with key partners. For example, SA Government departments and statutory authorities, local councils, RTOs, RDAs or others.	1.2, 1.6, 4.4

ACTION		STRATEGIC PILLARS
15.	Materialisation SA VIC Network partnership as per MoU deliverables.	
16.	Implementation of cooperate partnerships and event sponsorship activities to ensure ROI and retention of corporate partners.	1.2, 1.3, 2.7
17.	Membership sustainability, including growth in revenue and numbers.	1.1, 1.2, 1.3, 2.4
18.	Design a TiCSA activity to elevate TiCSA's presence in regions and engagement with regional members.	1.2, 1.6, 2.4, 2.6
19.	Hold bi-monthly board meeting.	4.1, 4.2, 4.7
20.	Update governance policies, systems, and practices.	4.2, 4.6
21.	Shape TiCSA's people and culture program.	4.3, 4.8
22.	Application of TiCSA Intern Program.	4.3, 4.4, 4.8
23.	Continue to develop the cultural tourism project in accordance with funding agreement.	2.1, 2.8, 3.3, 3.6
24.	Deliver communication activities that engage members and broader tourism community.	1.3, 1.5, 1.6, 2.7, 3.5

TiCSA
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