



Exploring heritage–tourism opportunities in South Australia:

Discussion paper



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State Heritage Unit

Department of Environment, Water and Natural Resources



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Department of Environment,
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*Cover photos: Some of South Australia’s premier heritage tourism assets
Top: Adelaide Oval; below from left: Umpherston Sinkhole; Palm House
in the Adelaide Botanic Gardens and Electra House*

Executive summary

Across South Australia, heritage underpins the tourism product. However, the contribution heritage makes is often not fully recognised nor measured adequately to quantify its real value to State and regional economies. Large numbers of South Australian places attract visitors because of their cultural or natural heritage values, including the townships of Burra and Hahndorf, and places such as Wilpena Pound, Arkaroola, Naracoorte caves and our iconic Adelaide Oval. The Oval is a good example of how heritage can greatly enrich visitor experiences – it is a unique, valued and admired part of our culture and identity, with its heritage-listed scoreboard presented as a central design feature. This heritage element brings a point of difference and character to the stadium, expanding its attraction from simply a functional stadium to a broader spiritual and cultural experience that offers wider appeal to both local and interstate visitors.

Heritage is a key component of what visitors seek – a unique and authentic experience – and what enriches and makes their visit to South Australia special and memorable. The connections between heritage and how it contributes to the State’s tourism industry and our vibrant city culture is poorly understood, and it’s economic potential is undervalued. Research shows that visitors pursuing heritage and cultural interests often stay twice as long as other visitors. For example, if heritage tourism adds just one extra day to each international visitor’s stay, this would contribute around \$37 million to the State and regional economies; if the 17 million annual domestic travellers increased their day trips and overnight stays by 20% to take advantage of heritage and cultural pursuits, a further \$343 million would be added to our economy, nearly 40% of which would benefit our regional communities.

The economic potential of how heritage contributes to the State's tourism industry and our vibrant city culture is poorly understood and undervalued

Initiatives that promote and package heritage-based tourism experiences in South Australia have potential to significantly contribute to the Government’s goal to have a tourism industry that contributes \$8 billion to the State’s economy by 2020.

The Department of Environment, Water and Natural Resources (DEWNR) and the South Australian Tourism Commission (SATC) are working together to help industry capitalise on the State’s unique and competitive nature-based tourism assets, of which heritage is a key ingredient. There are clear opportunities and advantages to be gained for South Australia from exploring ways that heritage can contribute and add value to nature-based tourism experiences.

While there is potential to create new visitor experiences associated with heritage places and to market our products better, adding and improving stories around existing heritage experiences would greatly enhance the visitor experience. Anecdotal

feedback from tourists visiting South Australia, particularly our parks, is that there is inadequate information about places of interest. DEWNR can play an important role in collaborating with other key stakeholders such as History SA and local historical societies to make these stories more accessible to visitors. Sharing stories about how places were used and enjoyed in the past through digital technology or other means has potential to engage visitors, enrich their experience and boost the popularity and appeal of such destinations.

Heritage tourism not only benefits State and regional economies and employment, but also generates further job and volunteering opportunities for those managing and conserving our State's parks and heritage buildings. We need to find innovative ways to fund the conservation of our heritage assets, parks and infrastructure for the benefit of our community, visitors and future generations.

Ideas for funding that have worked successfully in other jurisdictions include a heritage lottery, revolving fund, sponsorships and crowd sourcing. In particular, these funds could be directed at iconic tourism sites that are at risk or in need of conservation or revitalising to meet the increasing demands of heritage owners and the tourism industry.

We need innovative ways to fund the conservation of our heritage assets, parks and infrastructure for the benefit of our community, visitors and future generations

Above all, the nexus between tourism experiences and heritage in South Australia provides the opportunity to keep the unique places that make the State a great place to live, work and visit for current and future generations to enjoy.

INTRODUCTION

Purpose of this paper

This paper highlights the value of heritage in the tourism sector, a key ingredient of tourism experiences in South Australia that is easy to overlook and undervalue, and how Government can enable key stakeholders to strategically invest in building a stronger tourism product that taps into our unique heritage.

Heritage suffers from being taken for granted by its very nature: the fact that it has been there for as long as we can remember. It has become part of the fabric of our everyday lives and so has become integral yet often unseen. This tends to make it easy to undervalue its unique qualities and the need to protect and maintain them for the benefit of locals and visitors, and ultimately a rich and resilient economy.

Heritage is key to what visitors seek – a unique and authentic experience

Heritage is a key part of what visitors seek – a unique and authentic experience, something that enriches and makes their visit to South Australia special and memorable. This paper explores how Government can support and enable heritage tourism to underpin and contribute to the State's tourism goal of contributing \$8 billion to the economy by 2020.

This paper has been prepared at the request of the Minister and is a preliminary assessment of how heritage can contribute to the Government's economic growth agenda with a focus on tourism. It primarily addresses natural, built and maritime heritage protected under South Australian heritage legislation but at this stage, has not attempted to include Aboriginal heritage or the Arts.

Deloitte in its report *Positioning for Prosperity (2014)* identified tourism as one of five 'super-growth' sectors that will drive jobs and growth as the next wave of opportunity across Australia. The South Australian Government has recognised this tourism opportunity and identified it as one of ten economic priorities for South Australia. The 2015-16 State Budget included a major funding package to drive the economy and job creation through tourism and education. At the heart of the package is \$35 million over two years to promote South Australia to domestic and international markets, secure new major events and conferences, and create thousands of tourism-related jobs.

The *South Australian Tourism Plan 2020* reaffirms the State Government's ambition for an \$8 billion tourism industry by 2020. Tourism is an important industry that directly employs 31,000 South Australians and indirectly employs a further 23,000. In the year to December 2013, 5.6 million overnight visitors spent \$5.1 billion in South Australia across 18,000 tourism businesses (South Australian Tourism Plan 2020). The Plan

recognises that our State offers the best of Australia: unspoilt nature, premium food and wine, an unhurried pace of life, and friendly people.

Chris Zeiher, Marketing Director, Lonely Planet Asia Pacific (Sunday Mail 19 July) writes

'Travellers still want that 'selfie' moment in a destination, but they also want the story that goes with it – the 'what happened before, during and after that specific moment'.

Travellers want authentic experiences. That is our State's competitive advantage – our unique and genuine experiences, and our heritage is key to this advantage.

Photo: State heritage-listed Umpherston Sinkhole – rated by Tripadvisor Australia as number 1 of the top 16 things to do in Mt Gambier



Specialist tourism ventures, whether nature-based, adventure, Indigenous, historic, cultural or ecotourism, all rely strongly on heritage and heritage places, and that natural and cultural heritage underpinned much of Australia's tourism product.

Experience in Australia and overseas shows the value of improving links between tourism and heritage places – as the quality and diversity of tourism products improves, heritage places are better cared for and regional development is stimulated.

NATIONAL TOURISM AND HERITAGE TASKFORCE 2003

Heritage tourism

So, what is it?

Heritage comprises both the physical and intangible. It is things that we value, have inherited and want to hand on to our future – everything from oral tradition, memory and language, to collections, archives, places, buildings and landscapes. These are the things that we enjoy and learn about by visiting museums, archives, historic sites and parks; and which give identity and distinctiveness to the towns, cities or rural areas where we live (Clarke 2013).

The terms 'heritage' and 'culture' have become interchangeable and elastic. As part of the 'cultural tourism' spectrum, heritage complements Indigenous and arts tourism definitions. However, the historical dimension influences all tourism products. Even the most pristine land or seascape can only be understood in terms of a history of human contact, exploitation and protection, understanding and promotion. In a sense, heritage provides both a common thread for interpretation of our tourism products and a point of uniqueness and differentiation.

Cultural and heritage visitors – both domestic and international – spend nearly twice as much time and money as other visitors

Why is it important?

According to Tourism Research Australia's *International Visitor Survey* (2012), just under half of all overseas visitors (48%) attended at least one cultural or heritage attraction while in Australia. Of the 2.8 million international cultural and heritage visitors to Australia in 2012, 58% reported visiting a museum or art gallery and 57% had visited historical and/or heritage buildings, sites or monuments.¹

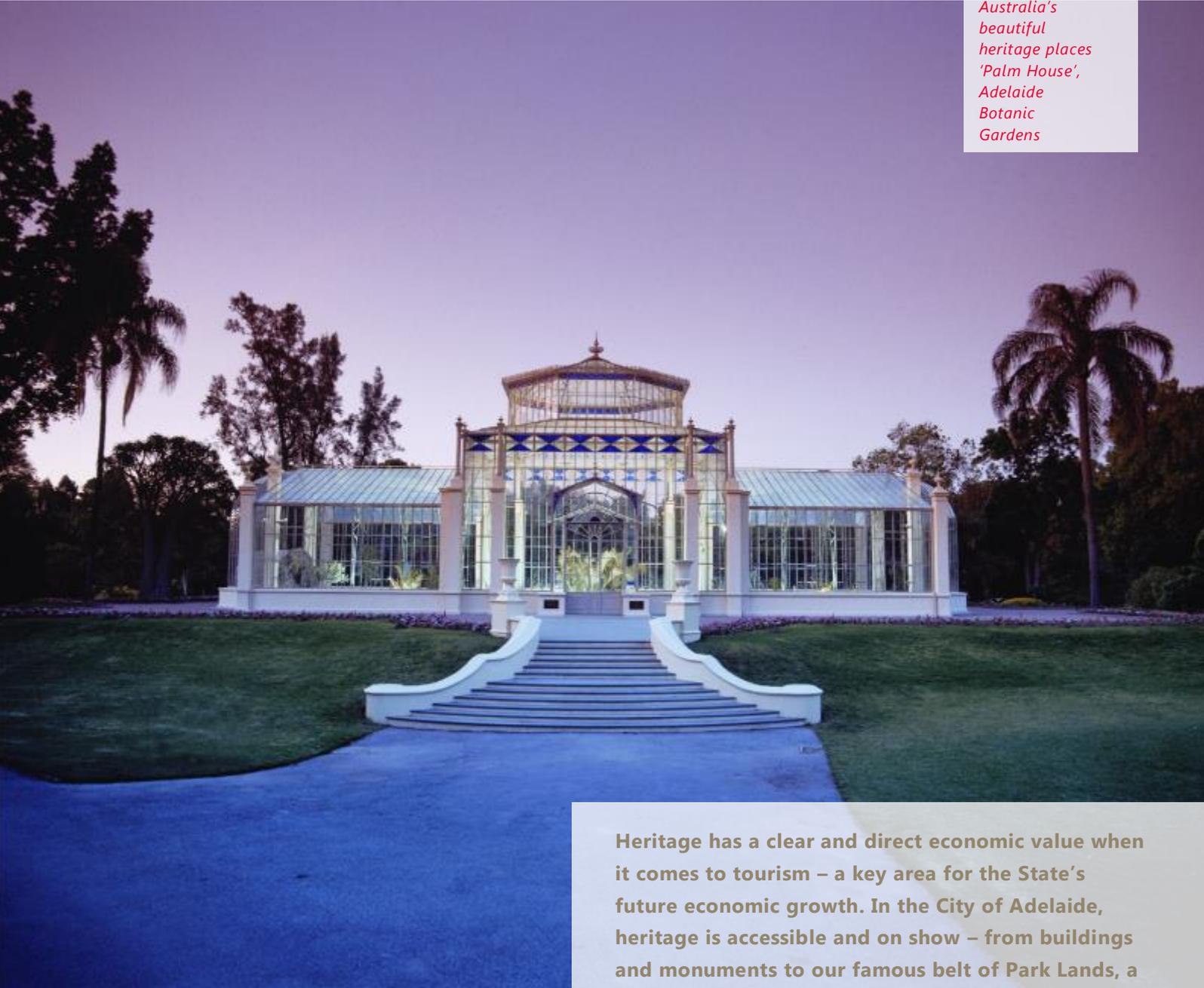
Tourism Research Australia data (2012) shows that international cultural and heritage visitors spent nearly twice as much time and money as other international visitors. International cultural and heritage visitors stayed 47 nights compared with other international visitors who spent 26 nights on average.

During 2012, 15% or 11.3 million of domestic travellers were cultural and heritage visitors, who spent a collective 59.8 million nights at least 40 kilometres from home. Visiting museums or art galleries was the most popular cultural activity for both domestic overnight visitors and day trippers, with attendance of 46% and 38% respectively. Visits to historical/heritage buildings, sites or monuments attracted 29% of overnight visitors and 21% of day visitors.

According to Tourism Research Australia *National Visitor Survey* (2012) domestic overnight cultural and heritage visitors spent \$11.375 billion in 2012 and nearly double the amount of those not participating in cultural or heritage activities.

¹ Visitation to natural landscapes and parks were not captured within this survey.

*Photo: One of
South
Australia's
beautiful
heritage places
'Palm House',
Adelaide
Botanic
Gardens*



Heritage has a clear and direct economic value when it comes to tourism – a key area for the State’s future economic growth. In the City of Adelaide, heritage is accessible and on show – from buildings and monuments to our famous belt of Park Lands, a legacy of Colonel Light’s visionary plan. In many country and regional areas, heritage unquestionably underpins cultural tourism. But there is another, indirect value often overlooked: foreign students and migrants often cite scale, charm and ‘feel’ as important factors in their choice of Adelaide as a location to study or live.

SOUTH AUSTRALIAN HERITAGE COUNCIL (2012)

What are the economic benefits

The extended stay and greater spend of visitors pursuing heritage and cultural interests has obvious flow on benefits for State and regional economies. However, to fully value these economic benefits, we need to better understand our range of product offerings and consumer preferences.

Economic research from across Australia and some older studies from within South Australia demonstrate heritage tourism can provide economic stimulus and job creation. Using basic calculations, we can estimate that if heritage tourism was to add just one extra day to international visitors' stay and a 20% increase to domestic visitation, the contribution to State and regional economies would be in the order of \$37 million and \$343 million per annum.

There is, however, no recent data or broader knowledge of heritage tourism's benefit to the State. The Adelaide City Council is currently commissioning a similar report to that undertaken by the City of Perth in 2008. This will provide a clearer indication of the value of heritage tourism to Adelaide.

Currently, visitor experience data captured by the South Australian Tourism Commission does not meaningfully capture heritage information. Often heritage is inherent and forms part of the sightseeing, parks, or food and wine experiences, but is not clearly recognised or measured. There is a role for heritage within the tourism industry, possibly as its own product with its own strategy, but certainly as a proven way to add value to nature-based and food and wine experiences.

There is a role for heritage within the tourism industry, possibly as its own product with its own strategy

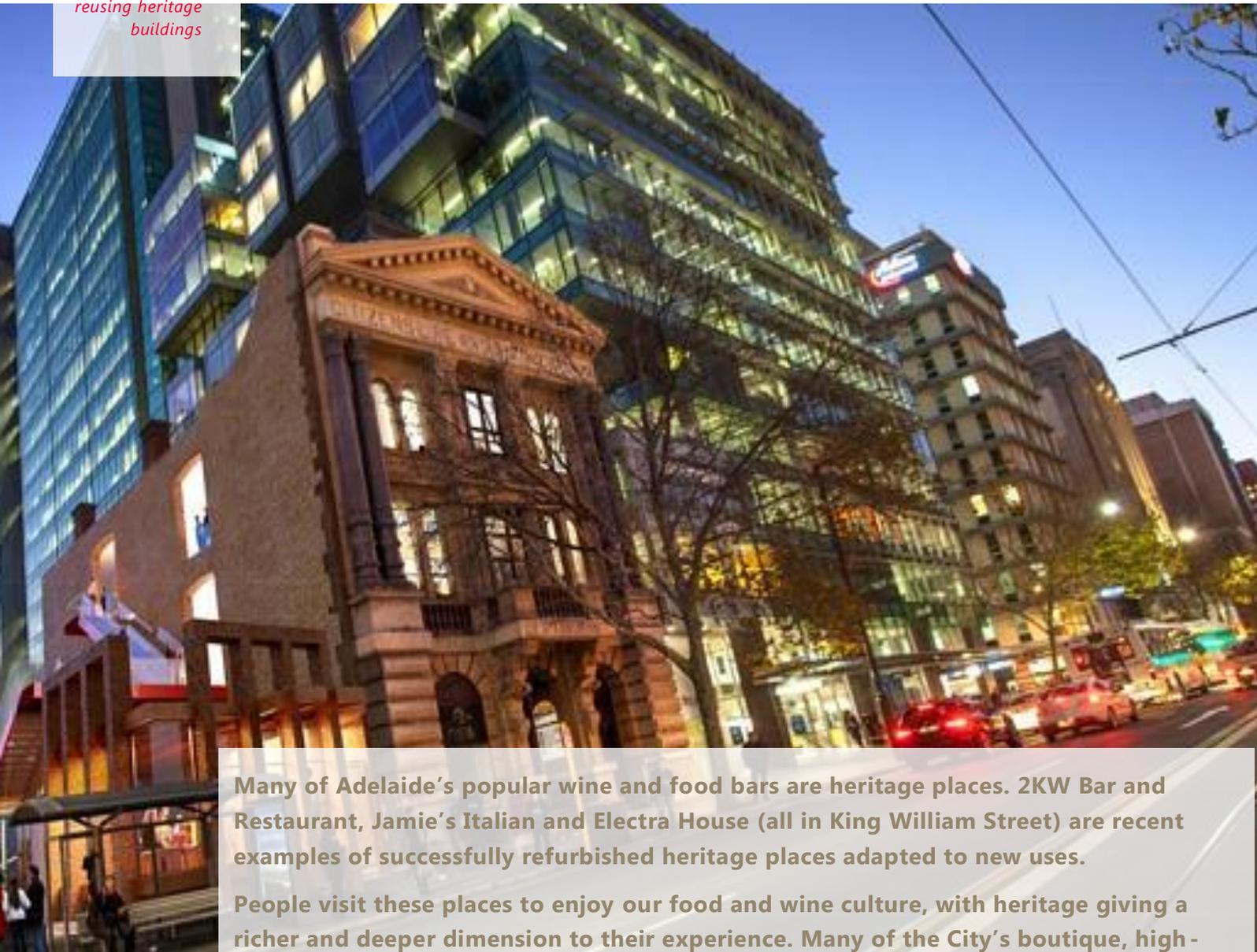
The following Australian studies provide some indication of the economic benefits of heritage and culture-based tourism:

- In 1995, Heritage Victoria estimated that recreational diving in Victoria contributed nearly \$20 million a year to tourism and business incomes.
- A study of tourism income in Fremantle, Albany and New Norcia (Western Australia) showed that heritage was a catalyst for direct tourist expenditure, including around \$81.2 million for Albany, \$27.5 million for Fremantle, and \$1.6 million for New Norcia.
- The report *Economic Value of Heritage Tourism in the City of Perth, Western Australia* (2008) indicates that heritage contributes up to \$350 million or 37% of the total visitor expenditure.
- A 2008 report *Economic Activity of Australia's World Heritage Areas for the Australian Government* indicated that South Australia's World Heritage Site, the Australian Fossil Mammal Sites (Naracoorte) contributes:
 - \$6 million in annual direct and indirect state output or business turnover
 - \$2.8 million in annual direct and indirect state value added
 - 47 direct and indirect state jobs.

- A case study undertaken in 2000 by the Cooperative Research Centre for Sustainable Tourism, University of Canberra, suggests that for the Burra Heritage Township, expenditure per head of the 40,900 annual visitor numbers was \$109.45, resulting in an aggregate expenditure of \$4.4 million, Gross Regional Product Impact of \$4.8 million and employment impact of 333 jobs.

Data from South Australia on visitor experiences does not meaningfully capture heritage's contribution to tourism

*Photos:
Electra House,
an example of
successfully
adapting and
reusing heritage
buildings*



Many of Adelaide's popular wine and food bars are heritage places. 2KW Bar and Restaurant, Jamie's Italian and Electra House (all in King William Street) are recent examples of successfully refurbished heritage places adapted to new uses.

People visit these places to enjoy our food and wine culture, with heritage giving a richer and deeper dimension to their experience. Many of the City's boutique, high-end and popular bars and restaurants are found within lanes and buildings that exude our heritage and history. These relatively new aspects of Adelaide city living and culture demonstrate the market value and growth potential of tourism offerings that embrace a quality heritage experience.

Developing our heritage tourism product

Successful heritage tourism will not occur just because a historical connection is present. As with all tourism activity, a number of key elements - the experience, the product, market and access, and promotion and partnership - must be present as foundations for success.

The Experience

Heritage tourism is a broad sector that includes a range of operators, sites and activities, such as historic house museums, community museums, historical societies and preservationist groups, heritage railways, walking tours, historical ruins, and heritage sites within national parks. Heritage tourism operators are united by a shared focus on using quality storytelling to engage tourists with aspects of the past. As such, high-quality and engaging interpretation is the cornerstone of heritage tourism. Heritage can be interpreted in a range of ways: through signage or exhibitions; storytelling by tour guides; as part of live performances; using audio guided tours; and creative sound and light shows. Increasingly, best practice in heritage tourism is distinguished by the use of new digital technologies (Victorian Parliament 2014).

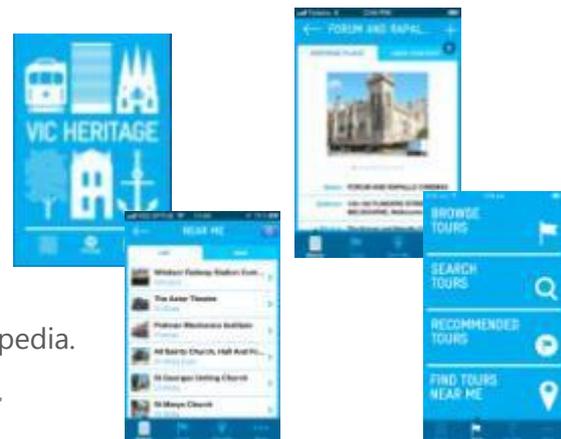
High-quality and engaging interpretation is the cornerstone of heritage tourism

There is a lack of depth and appropriate interpretation in existing heritage tourism products (National Tourism and Heritage Taskforce 2003). The quality of experiences can be improved upon, particularly where potential exists to develop content-rich products that educate about the natural and cultural values of places.

In addition, signage in many areas is inadequate. The lack of internationally recognised and standardised signage hinders more effective visitor management (National Tourism and Heritage Taskforce 2003). Research on interpretation methods has been slow to be applied in many instances: for example, at some sites, an abundance of physical signage offers more information than most visitors will read or absorb, and signs can be dull, uninspiring and repetitive (Frost 2006). Signage is expensive to install and maintain, and often falls into disrepair, detracting from the site. It can absorb significant amounts of capital for no economic return. New and innovative interpretation should be explored, to ensure return on investment. Heritage signage should encourage 'mindful' visitors, who are active, interested, questioning and able to reassess their view of the world (Frost 2006), which requires multi-sensory, personally relevant, vivid or surprising interpretation (Frost 2006).

Many of our State Heritage Places and Historic Shipwrecks have a range of information and photos that tell their story. In the past twelve months, DEWNR has been digitising this information and is now able to make it available to the public through the DataSA website. The National Trust has begun using this information to populate and develop its heritage apps including Willunga Walks and Adelaidepedia.

In South Australia, DEWNR could use its wealth of digitised resources to provide a deeper experience for visitors as part of the nature-based tourism strategy. We have the opportunity to link this data to QR readers, web pages or applications to enrich the experience of a heritage place for visitors/tourist.



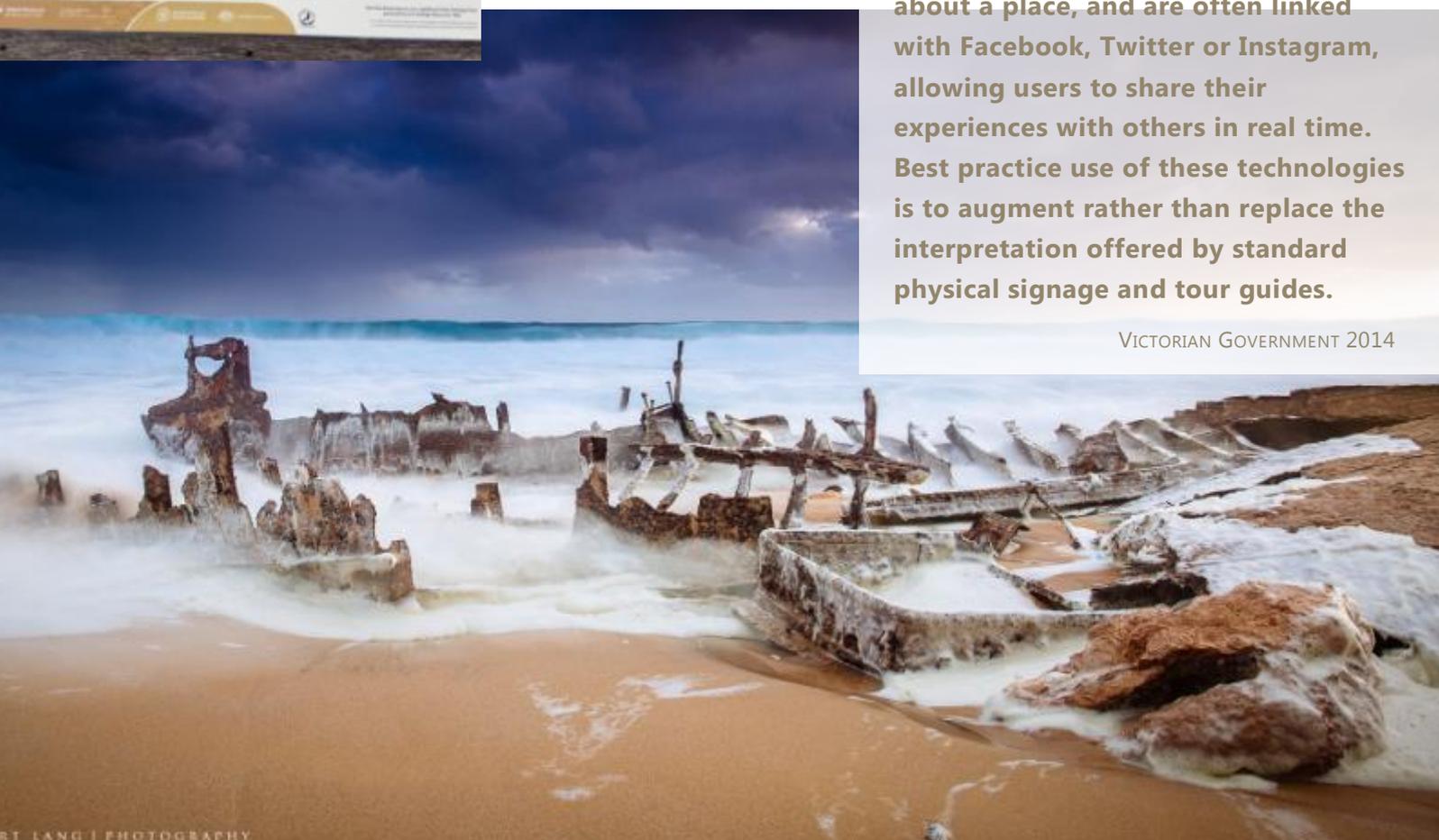
Vic-Heritage app, which explores the histories of the most important and unusual places in Melbourne and regional

One of the advantages of new technology is the ability to communicate the 'layered' history of a heritage place. Rather than relying solely on physical signage, an app or a QR code can lead visitors to text and audio-visual material that provides multiple stories and narratives about a particular site. Increasingly, apps have interactive functions that allow users to contribute their own experiences about a place, and are often linked with Facebook, Twitter or Instagram, allowing users to share their experiences with others in real time. Best practice use of these technologies is to augment rather than replace the interpretation offered by standard physical signage and tour guides.

VICTORIAN GOVERNMENT 2014



Photos: Inset - Clan Ranald Shipwreck sign, recognising the mass grave at the Edithburgh Cemetery; Below: Shipwreck of the Ethel, which ran ashore in 1904, Innes National Park, Yorke Peninsula [Photo courtesy of Robert Lang Photography]



The product

South Australia has a rich natural and cultural heritage that underpins our sense of place and identity. There are currently ninety four (94) State Heritage Places and two State Heritage Areas located within our parks system, of either natural or cultural heritage significance.²

Our heritage places contribute significantly to our story and sense of who we are. The settlement origins of South Australia are unique in Australia. People came here of their own free will to build a society based on values they held dear. Many of these values are expressed in the way we have planned and preserved our landscapes, from the vision of Colonel Light who planned the Adelaide Parklands and city squares, to the recent protection of our State's marine parks.

South Australia was a 'Paradise of Dissent' (Pike 1957). Many of the earliest settlers flocked here to avoid religious persecution or to seek new opportunities. The melting pot of cultures included not only English people enticed by the promise of land and opportunity in the free colony of South Australia, but also Lutheran German farmers and winemakers, Cornish copper miners, Welsh slate miners and Scottish Presbyterian sheep farmers. There was no state church in South Australia, so settlers were free to worship as they pleased.

The early settlers of South Australia came together to forge a new life for themselves, and the buildings and communities they established provide fascinating insights into a heritage that is unique to South Australia. For example, we have four times as many German buildings and communities in South Australia than other states; significantly more Methodist churches, yet relatively few Catholic and Anglican churches (because South Australia had neither convicts – many of whom were Irish – nor supported the Anglican Church, as other States did); and hundreds more stories to be told.

The history and heritage of South Australia is reflected in the buildings, landscapes and places that survive to this day, many of which create a feeling and culture – 'a sense of place' – that distinguishes South Australia from other destinations and is part of the essential foundation of the State as a tourism drawcard.

South Australia has hundreds of heritage places that are either open to the public or part of a tourist trail. These include historic townships such as Hahndorf, Burra and Willunga (State Heritage Areas as well as important tourist attractions); museums and art galleries; historic houses; and heritage wineries and eating places. It is natural for tourists to be attracted to places that offer a cultural

Tourists are attracted to places that offer a cultural as well as a general experience... to appreciate the age, beauty and stories attached to places

² <http://www.environment.sa.gov.au/files/sharedassets/parks/heritageplacesinparks.pdf>

as well as a tourist experience, and to appreciate the age, beauty and stories attached to places like Carrick Hill, Fort Largs and St Peter's Cathedral.

The breadth of potential experiences for tourists varies greatly across the State. For example, some museums are well-funded and able to provide exceptional visitor and educational experiences, while some are run on a shoe-string and unable to fulfil anything like their potential or are at risk of closure due to deteriorating condition.

In South Australia, we need to get to know our heritage tourism products better, keeping in mind that visiting a heritage attraction may be just "one of a number of motivations for tourists choosing a destination" (Frost 2006). Understanding how heritage places combine with a mix of attractions and activities on offer is required.



South Australia has its own special heritage places that are either open to the public or part of a tourist trail. Some of these include historic townships such as Hahndorf, Burra and Willunga and places like the Adelaide Gaol, Martindale Hall and the Moonta Mines.

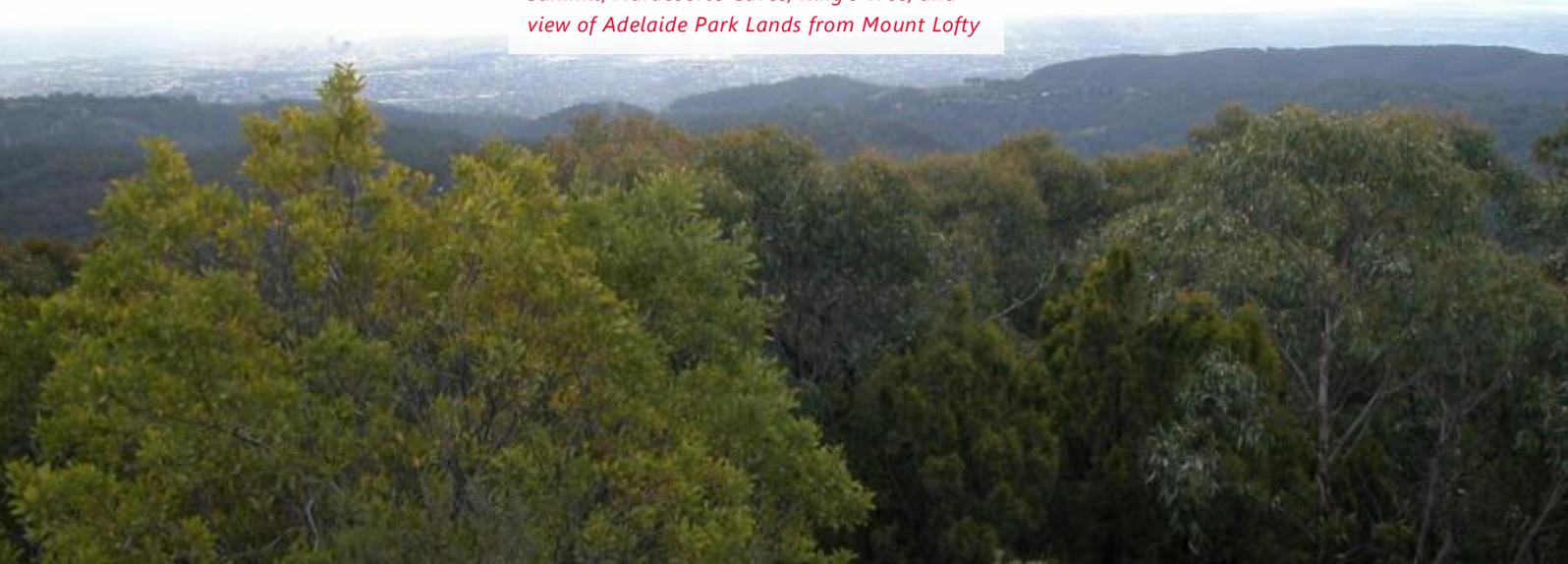
Photo: Historic Hahndorf, Australia's oldest surviving German settlement, located in the Adelaide Hills



In South Australia, we have over 2,200 State Heritage Places and Areas (covering 350,000 hectares including natural heritage), 7,079 local Heritage Places and 793 Historic Shipwrecks. Many of the State Heritage Places (around 650) are owned by the State Government and over 50% of these are the responsibility of the Minister for Sustainability, Environment and Conservation.



This page (clockwise from top left): Mount Lofty Summit; Naracoorte Caves; King's Tree; and view of Adelaide Park Lands from Mount Lofty





CASE STUDY

The Cedars Museum near Hahndorf

'The Cedars' is a privately-owned museum that commemorates the life and work of two of Australia's most important painters: Sir Hans Heysen (landscape artist and conservationist) and Nora Heysen (Australia's first female war artist and first female winner of the Archibald prize).

The Cedars – a hidden gem near Hahndorf – is one of the country's most intact and best preserved historic homes, including Australia's oldest purpose-built artist's studio. However, it is now at risk of closure.

The museum is owned and run by members of the Heysen family and volunteers, but is at risk due to high running costs and modest visitor numbers. Reviews on sites such as trip advisor (where it is rated 4.7 out of 5) report that 'the Cedars' provides an excellent visitor experience. Comments include: 'one of Australia's best kept secrets'; 'I wish I'd found out about this place earlier – it is a hidden gem.' This indicates that the Cedars is a high quality product (buildings, paintings, tours, gardens), but is less effective or unable to conduct successful promotion and marketing.

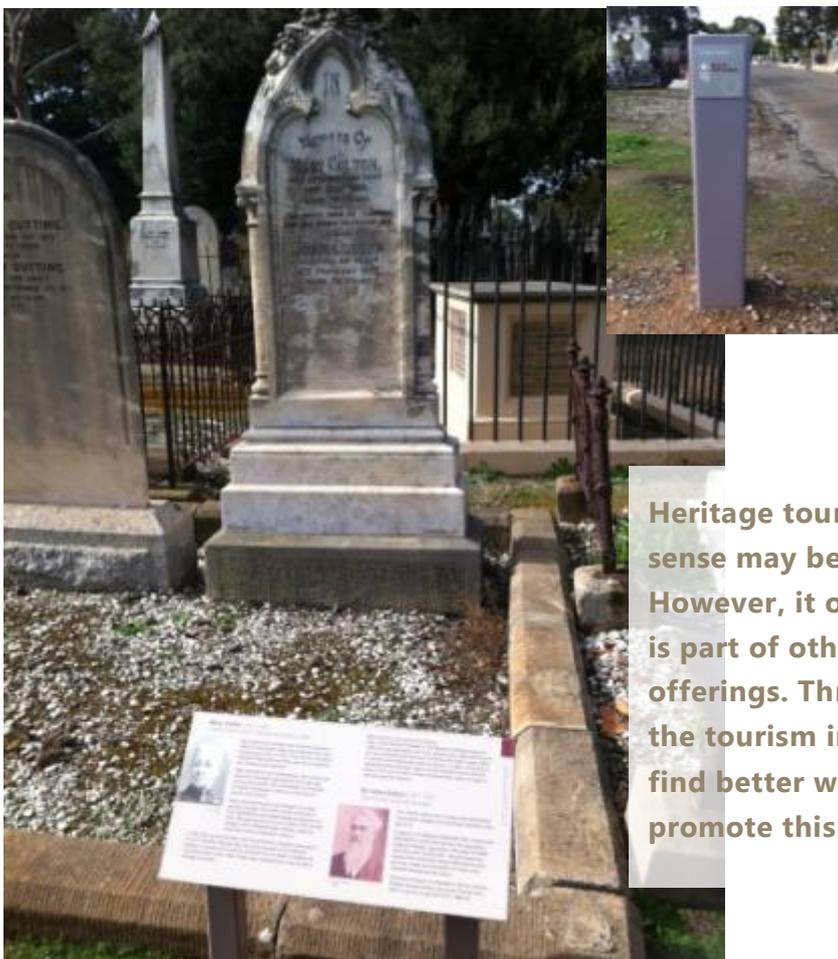
Investing in places with untapped tourism potential will increase the number of quality options for South Australian tourists and boost the tourism industry

Market and access

Limited information is available on the potential for developing tourism products and packages using heritage themes (National Tourism and Heritage Taskforce 2003). Further specific market research and demand analysis is required to help identify underdeveloped opportunities, identify specific thematic or market niche development potential (such as migrant heritage) and identify other thematic areas suitable for potential development. This needs to be linked to the type of visitor that South Australia attracts (or is targeting in campaigns) and further development of the existing product.

Little is known about heritage tourism and its potential within South Australia. Heritage often underpins many other tourism products, but there is little understanding of what is available, what is sought after, and who the consumer is. To understand this better, DEWNR could work with the South Australian Tourism Commission (SATC) to develop a broader community-based discussion paper similar to that of the nature based strategy.

In South Australia, there may be specific opportunities for tourism based on heritage themes, for example, migrant heritage, shipwrecks, history of Chinese migration to the Victorian goldfields and railway expansion.



Photos: Heritage listed West Terrace Cemetery is one of Australia's oldest capital city cemeteries. Inset shows sign post that guides visitors on a variety of walking tours.

Heritage tourism in its purest sense may be a niche industry. However, it often underpins and is part of other tourism offerings. Through its marketing, the tourism industry needs to find better ways to bundle and promote this often hidden asset.

Promotion and partnership

The current *South Australian Tourism Plan 2020* does not mention the word 'heritage'. There is an important opportunity to develop a closer partnership between DEWNR and the SATC to explore ways that heritage can have a higher profile in tourism marketing opportunities.

DEWNR needs to work with SATC, the South Australian Heritage Council and the heritage sector to define where heritage experiences can add value. Working with the SATC and regional tourism entities in their planning and marketing is the best pathway to integrate heritage assets into tourism opportunities. To effectively market heritage tourism in South Australia, we need to leverage the market segments, strategies and targets in the *South Australian Tourism Plan 2020* to focus on our 'unique experiences', food and wine and unspoilt nature.

Searches on many of the tourism type websites do not have information about our South Australian heritage tourism products. We need better ways to connect and promote our iconic places through these sites. Information on heritage walks and trails are promoted on our DEWNR website in the State Heritage page, but those planning a trip to South Australia are unlikely to look at our website for this type of tourist information?

In South Australia, we need to facilitate the packaging of useful information for prospective visitors that makes it easy for them to identify the heritage attractions available and how they can be integrated into their travel plans.

As with the nature-based tourism strategy, Government needs to signal to heritage tourism stakeholders that we want to build similar momentum to *enable* the heritage tourism sector to grow

Photos: Santos Museum of Economic Botany within the Adelaide Botanic Gardens is the last of its kind in the world.



The Proposal: Boosting heritage tourism in South Australia

Establishing a heritage-tourism alliance

While a community-based discussion paper could be one way to understand the heritage tourism sector more tangibly, another approach could be to establish a Heritage Tourism Alliance. DEWNR could work with the SATC to host a workshop of interested stakeholders, and from this, establish an alliance if the opportunity presented itself. This alliance might include representatives from: South Australian Heritage Council, SATC, National Trust, History SA, Australia ICOMOS, and the Australian Institute of Maritime Archaeology.

As part of this Heritage Tourism Alliance, DEWNR could stimulate development of heritage tourism experiences and products, including but not restricted to:

- Cornish mining heritage in places such as Burra, the Copper Triangle and Kapunda
- Chinese immigration to South Australia (through Robe) and its connection to the Victorian goldfields of the 1850s including its shipwrecks with possible links to the Mount Gambier Volcanic Complex State Heritage Area, the World heritage-listed Australian Mammal Fossil Site at Naracoorte and the South-East's fresh food and wine (particularly seafood at Robe).
- combined heritage and food and wine experiences in the Barossa Valley, McLaren Vale and the Adelaide Hills
- nature-based heritage tourism within the State's reserve system, including fossil and geological sites
- interpretation of landmark State Heritage Places in the Adelaide CBD, particularly along North Terrace and King William Street, and in the Adelaide Park Lands
- an interpretative centre that tells Australia's geological, plant and animal evolution, intertwined with Aboriginal dreaming stories with interactive graphics, 3D images, maps and perhaps simulations to allow visitors to journey back in time, based either in the CBD or at Cleland Conservation Park
- cave diving tours, which tap into the rapidly growing numbers adventure-based tourism market
- heritage places as venues for weddings and unique parties.

A Heritage Tourism Alliance could stimulate the development of high quality tourism experiences and products

Investing in heritage conservation: economic and other imperatives

While there is a direct economic benefit to regional economies which rely on heritage tourism through visitor spending and employment, there is also an unrecognised social benefit: an overwhelming 97% of the population regard educating the future generation about our heritage as important and 93% believe it is important to protect our heritage (Allen Consultancy Group 2005).

In recent years there has been a trend nationally for States to withdraw investment in heritage places, both in terms of heritage listing and conservation. Nearly every state has either reduced or totally withdrawn their conservation grants programs. Similarly, the Commonwealth Government offered grants for conservation of State Heritage Places, but this was discontinued in 2014 and funds are now only available to world and nationally heritage-listed places.

The Western Australia Government has been an exception to this trend, regarding heritage as valuable to its economic development and creating a Heritage Tourism Strategy in 2008. It has pioneered investment in heritage conservation through innovative practises, such as a heritage lottery (see case study, page 22) and a revolving fund (see case study, page 23), to stimulate adaptive reuse of heritage buildings, tourism start-ups and conservation of iconic heritage.

In the Northern Territory, the Government recently committed \$6.1 million over three years to develop and implement the Northern Territory Heritage Enhancement Action Plan.

In New South Wales and Victoria, the 2015 state budgets recognised the importance of providing significant investment in tourism and events but also reinvesting in the conservation of heritage assets (including parks), with considerable infrastructure works or conservation funds made available (see page 31-32).

The retraction of funds for heritage conservation grants in South Australia has created challenges for owners of State Heritage Places who currently have no access to State funding to maintain their heritage asset. The current system allows local heritage owners to access grants that owners of State Heritage Places cannot, despite the fact that state places are valued by and of benefit to the community. These places are in increasing need of repair, some being used as tourist accommodation, places to visit, with potential to become a successful tourist product with the right ownership, investment or support.

A South Australian Heritage Lottery could provide an opportunity to invest in heritage conservation for key iconic sites and tourism start-ups.

CASE STUDY:

Heritage Lottery Boosts Heritage Tourism in Western Australia

In 2013-14, Lotterywest contributed over \$270 million to the Western Australian community, including \$1.6 million in grants to heritage projects run by local government and community organisations. This heritage lottery money led directly to increased benefits for the tourism industry and the community.

Lotterywest is the only Australian lottery with a direct grants program. Priority is given to urgent works and projects which demonstrate broad community use and support. Most of the heritage places conserved through Lotterywest Grants are important focal points and meeting places for communities. Many are also prime tourist attractions. By providing seed funding to conserve places, improve interpretation and upgrade facilities, benefits are magnified as visitation increases, visitor experiences are improved, and the place is able to generate increased revenue for itself and the surrounding area. Examples include the restoration of iconic buildings that are part of heritage and tourism trails, development of signage for tourism trails, the upgrade and enhancement of museums and galleries, and improvements to heritage places that provide tourist accommodation and dining experiences.

One of the highest profile recipients has been Carnarvon's space station, which first broadcast images of the moon landing in 1969 and is now conserved and home to one of Western Australia's most highly-rated new tourist attractions.

And the winners are... Heritage tourism and local communities!

Money is spent on the projects that are most important to the community

Tourists flock to invigorated heritage icons

A heritage lottery would operate in similar manner to the hospital research home lottery in South Australia with funds raised aimed at preserving and making accessible our State's heritage. The idea for a heritage or cultural lottery and endowment fund was supported in the report *Transforming our Planning System: Response of the South Australian Government to the final report and recommendations of the Expert Panel on Planning Reform* (2015), released in March 2015. Considerable work and research on the idea of a heritage lottery was undertaken in 2012, but it was not progressed at that time. This information could be readily updated and re-presented for consideration by State Government.

A heritage lottery or revolving fund in South Australia could provide obvious benefits to protect and enhance heritage places in South Australia that could have far-reaching flow-on benefits for communities and/or the tourism industry. For example, Nuriootpa's Coultard House was recently opened to tender by the Nuriootpa Futures

Association. They were looking for tenants interested in utilising the site for the betterment of Nuriootpa and the wider Barossa community. The facility would offer many compatible uses, which would increase both its heritage profile and its tourism potential, including use as a restaurant or bed-and-breakfast. Seed funding to help establish this sort of use would ensure a bright future for this heritage landmark.

A state lottery that reinvested a portion of its profits back into the community would have enormous potential benefits for South Australia, both for investment in heritage conservation, tourism, environmental and parks projects, and increased economic activity and community/social pride and wellbeing.

Another investment option is crowd sourcing or philanthropy, which could be further investigated. Heritage New Zealand recently received a bequest for over \$3 million for heritage management and additional prime real estate offices in the heart of Wellington. The National Trust of South Australia may seem like the obvious choice for philanthropy and has established itself well in this respect. However, provisions of the administered funds arrangement under section 10 of the *Heritage Places Act 1993* could also be used to secure any bequests or donations. Alternatively, a joint arrangement with the National Trust or the proposed Heritage Tourism Alliance, similar to that with the Nature Foundation SA, could be initiated.

CASE STUDY **Revolving Fund**

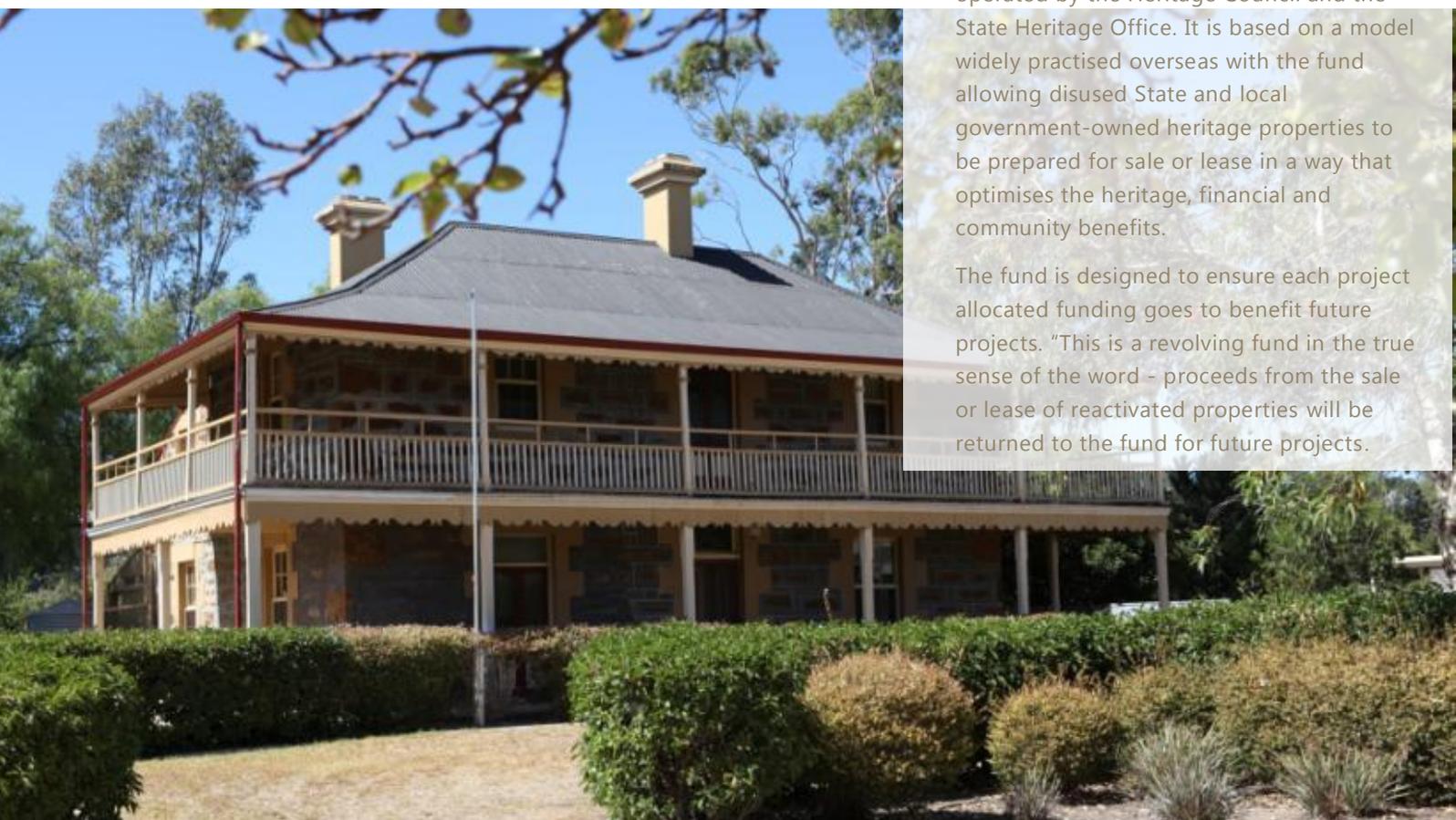
Is the Revolving Fund a solution to the Minister for Planning's issue concerning building vacancies on North Terrace and the desire to sell Government-owned heritage assets?

In May 2014, the Western Australian Government established Australia's first Heritage Revolving Fund to reactivate languishing heritage buildings to ensure they have a viable future.

A total of \$4 million was allocated over two years to establish the program, which is operated by the Heritage Council and the State Heritage Office. It is based on a model widely practised overseas with the fund allowing disused State and local government-owned heritage properties to be prepared for sale or lease in a way that optimises the heritage, financial and community benefits.

The fund is designed to ensure each project allocated funding goes to benefit future projects. "This is a revolving fund in the true sense of the word – proceeds from the sale or lease of reactivated properties will be returned to the fund for future projects.

Coultard House, Nuriootpa, recently opened to tender by the Nuriootpa Futures Association.



Connecting heritage and nature-based tourism

DEWNR has an important role in promoting our State and local heritage places that are situated within national and conservation parks as part of the State's Nature-based Tourism Strategy.

South Australia has a unique range of fossil and geological heritage sites. For example, the Ediacaran deposits in the Flinders Ranges are amongst the oldest fossils found to date, and the Megafauna fossil sites in the Naracoorte Caves are amongst the best-preserved sites of this type in the world. Both of these sites are owned by DEWNR and are Heritage Places recognised on State or World registers.

A Business Plan on Fossil & Geological Tourism in South Australia (2003) concluded that in comparison to fossil experiences elsewhere in Australia and overseas, South Australia has many sites that could be developed and promoted. Fossil and geological heritage tourism is a 'special interest' category or subset of the broader nature-based tourism. South Australia is uniquely placed to lead the way in fossil-based tourism in Australia.

The State's national and conservation parks contain many buildings and structures of State and local heritage significance, which tell stories about how these places were used prior to becoming part of the State's reserve system. These cultural assets provide the opportunity to promote a wider-than-natural-only history of parks. These places can also provide highly sought after accommodation. For example, the refurbished heritage buildings at Inneston in the Innes National Park, Yorke Peninsula provides visitor accommodation that adds to the visitor experience. Adding stories of the past within these buildings adds another dimension of experience and quality.

Where there is momentum and connection within DEWNR to align heritage and nature-based tourism, the opportunity should be harnessed and progressed.

While there may be potential to create new visitor experiences associated with heritage places, heritage can best contribute to the nature-based tourism strategy by contributing stories that enrich visitor experiences to a particular place. This is an important role DEWNR can play with other key stakeholders, such as History SA and local historical societies, to research and compile these stories and make them freely available using digital technology.

Historically, the Department invested in creating signs to mark heritage places. Many of these signs are located within parks and could be easily updated and linked to online information.



There is a well of untapped potential in South Australia’s cultural landscape ... strategically-invested funding towards places with heritage tourism potential will provide considerable benefits, ranging from improving visitor experience to increasing the time and money spent by international and domestic visitors.

Photo (from top): Inneston heritage accommodation, Innes National Park; and bottom: Point Lowly lighthouse and interpretation signs (left) and Flinders Ranges signage (right)



CONCLUSION

Overview

Heritage tourism already makes a significant contribution to the South Australian economy. However, that contribution is not currently measured or sufficiently valued in South Australia. Other jurisdictions have carried out surveys and produced reports that provide evidence of the significant economic and social benefits of well-managed and well-marketed heritage assets, and there is an opportunity to carry out similar work in South Australia to determine the best way to build on the significant resources we already have.

Evidence shows that strategically-invested funding towards places with heritage tourism potential will provide considerable benefits, ranging from improving visitor experience to increasing the time and money spent by international and domestic visitors. There is a well of untapped potential in South Australia's cultural landscape – ranging from stories that have not yet been told, to heritage icons that require more strategic marketing.

South Australia has many points of difference, and the more they are understood and enhanced, the better they can be marketed. South Australia also has many successful strategies to attract tourists that are enhanced by heritage tourism, such as premium food and wine, cultural festivals and nature-based tourism.

By investing strategically in building a stronger tourism product that taps into our unique heritage, we will not only be securing a richer tourist experience and increased tourist revenue, but will also be protecting and celebrating the things that are important to the South Australian community.

Next steps

There are a myriad of things that could be done to build on the special heritage tourism opportunities available in South Australia, ranging from actions that could be done at little to no cost, to actions that will involve considerable collaboration. The South Australian Heritage Council will be a significant resource for DEWNR and SATC to draw upon and where its experience and skills can inform the strategies and plans developed. Two important early actions are:

- To undertake a workshop with key stakeholders to explore key issues and opportunities
- Establish the level of stakeholder interest in developing a heritage strategy or establishing an alliance to explore and develop these opportunities

Other longer-term actions include:

- Work with the key stakeholders to develop ways to capture information about the impacts of heritage on tourism
- Develop a Framework of Historical Themes for South Australia
- Investigate methods of funding including lottery / revolving fund / sponsorships
- Work within DEWNR to incorporate heritage tourism opportunities within the State's Nature-based Tourism Strategy

Within DEWNR, the State Heritage Unit could:

- Work more closely with Partnership and Stewardships to:
 - Raise the profile of heritage within parks through the National Parks website
 - Develop the stories of heritage places within our Parks, utilising existing images and research
 - Identify the best way to make these stories available
- Refresh existing heritage walks and maritime trails and make these available to the SATC and regional visitor centres
- Continue to make heritage images, videos, research and stories accessible to the public through e-brochures, social media, travel guides and other sources

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Appendix: What are other jurisdictions doing to develop heritage tourism?

Australian Government

Draft Strategy for Australia's Heritage (2014)

In April 2014 the Australian Government released a draft *Strategy for Australia's Heritage* for public consultation.

Under *Pursuing Innovative Partnerships*, one of the commitments of the Australian Government is to foster greater collaboration between heritage and tourism sectors. Through the new Community Heritage and Icons Programme, the Strategy will encourage local and regional communities to promote and tell the stories of their local heritage and to explore linkages with local tourism bodies to further promote these heritage experiences. Proposed actions in the Strategy include:

- encouraging greater visitation to National Heritage places by enhancing the Australian Government web site to better tell the stories of these places and investigate ways of further promoting these places with tourism bodies;
- encouraging new ways in which innovative tourism experiences can be developed to encourage greater engagement with the cultural aspects of our heritage places;
- pursuing improved linkages between the heritage, national landscapes and tourism sectors to explore better promotion of Australia's special places;

Western Australia

In August 2006, the Western Australian Government released its Heritage Tourism Strategy.

The need for a Western Australian Heritage Tourism Strategy was first referenced in the 2003 *Western Australian State Sustainability Strategy*. The Heritage Council of Western Australia was charged with carriage of the process, in partnership with Tourism Western Australia. It complements those elements of Tourism Western Australia's *Pathways Forward – Strategic Plan 2003-2008* that addresses heritage places as a niche tourism product.

The Strategy identifies the means for turning heritage places and historic themes into sought after tourist attractions. It takes advantage of Western Australia's unique history and built heritage by generating local, national and international awareness of key historical sites and themes that have been, or continue to be, important to the State's development and sense of place.

The Western Australian Government has recognised and valued its heritage developing and pioneering products such as the Revolving Fund and LotteryWest grant schemes to conserve its heritage. The Heritage Office also runs programs such

as awards in heritage conservation and tourism which has provided a 30 fold return on investment.

Northern Territory

A Media Release 'Delivering Action in Heritage Enhancement' on 28 April 2015 issued by the Northern Territory Government in relation to the 2015-16 Northern Territory Budget highlighted:

- the development of one of the most comprehensive plans addressing the enhancement of the Northern Territory's much valued heritage sites
- a commitment of \$6.1 million over three years for the development and implementation of the Northern Territory Heritage Enhancement Action Plan, which will look at better connectivity between heritage places, a coordinated signage policy and more use of new technology to provide memorable visitor experiences
- \$6.1million expenditure over three years, which will include:
 - \$3.05million for work to Government-owned places, including sites of historic interest along Territory Highways
 - \$1.2million for work to enhance privately-owned heritage places
 - \$600,000 to enhance our regional museums
 - \$500,000 to replace signage at historic sites
 - \$100,000 for digital initiatives.

Queensland

Destination Success: the 20-year plan for Queensland tourism, released in 2013, recognises the importance of cultural and heritage tourism for the future development of the tourism industry especially in regional Queensland but, importantly, wants tourism that '*celebrates and protects our Queensland culture, heritage and our magnificent natural environment*'.

As a result, Tourism Queensland has developed a series of market segment strategies to identify opportunities for the development, management and marketing of key segments, such as cultural and heritage tourism.

Tasmania

In June 2012, Tourism Tasmania released three new strategies to help Tasmania maximise its tourism potential. The strategies aim to make the most of the historic heritage, arts and cruise tourism sectors.

The Historic Heritage Strategy aims to guide and develop the potential of Tasmania's historic heritage to increase Tasmania's appeal as a tourism destination, deliver benefits for local communities and contribute to the economic growth of the state.

The strategy seeks to maximise Tasmania's tourism potential by enhancing Tasmania's historic heritage offering, and its appeal to current and future markets. It describes

how heritage and tourism stakeholders can build a stronger and more viable tourism industry for Tasmania through improved products, strengthened interpretation, the promotion and packaging of historic journeys, and targeted marketing, including a focus on Tasmania's heritage and greater collaboration amongst stakeholders.

Victoria

Vic Heritage App

The Vic-Heritage app explores the histories of the most important and unusual places in Melbourne and regional Victoria. Spanning significant places from the 1840s to the present, the app captures everything from Victorian to modern architecture; from houses to industrial spaces; from mansions to bridges; from public toilets to trees and gardens.

Victorian Heritage Tourism and Ecotourism Inquiry (2014):

Between 2012 and 2014 the Environment and Natural Resources Committee of the Victorian Parliament held an inquiry into Heritage Tourism and Ecotourism in Victoria, which examined the current scope of ecotourism and heritage tourism in Victoria, including the extent to which the current arrangements maximise the benefits to the local industry, what is best practice, and what is the further potential for heritage tourism.

In relation to best practice in heritage tourism, the *Final Report of the Victorian Heritage Tourism and Ecotourism Inquiry*, released in 2014, recommended:

- Tourism Victoria renews its cultural tourism policy, in conjunction with Heritage Victoria and Arts Victoria, and includes within it a dedicated focus on the heritage tourism sector.
- Tourism Victoria and Heritage Victoria collaborate in developing guidelines to assist operators with the interpretation of Victoria's heritage in a tourism context, building on *Victoria's Framework of Historical Themes*.
- The Victorian Government fund a grants program to expand the development of digital interpretation for heritage tourism.
- Heritage Victoria will work with Tourism Victoria to strengthen the tourism focus of the 'Vic Heritage' smartphone app to include more sites throughout the state
- The Victorian Government draws on the Community Support Fund to support community organisations and local councils to fund heritage tourism projects.
- The Victorian Government works with Heritage Victoria, Tourism Victoria, and local government to develop incentives, or remove disincentives, for private owners to restore and maintain heritage buildings and structures for tourism use.

Victoria has recently announced it is investing in the future of its natural environment and heritage so more families can get outdoors and experience it together. The 2015-16 Victorian State Budget provides \$132 million to give families a safe, enjoyable and comfortable way to see our natural assets. In addition there is an additional \$80 million for attracting major events.

After the previous Liberal Government cut funds from Parks Victoria, the 2015-16 Budget provides \$11 million emergency injection of funds to upgrade dilapidated buildings, toilets, paths and roads and build new facilities in parks across Victoria.

The Labor Government is also taking action to preserve its natural and heritage assets, including \$13.4million to restore the historic Palais Theatre in Melbourne and \$2 million to establish the Canadian State Park in Ballarat.

New South Wales

The NSW Government has a renewed agenda to help secure the State's environment and heritage for generations to come. A record \$1.66 billion in 2015-16 NSW State Budget will be invested to protect the State's national parks and to preserve and protect significant heritage assets and local communities from pollution and environmental harm. This is a 3.9 per cent increase on the 2014-15 Budget.

The NSW Government will commit \$47 million towards conserving and celebrating the State's unique Aboriginal and non-Aboriginal cultural and historic heritage and is providing more than \$20 million over the next four years, including \$13 million of new funding, to preserve and refurbish heritage properties under the care of the Historic Houses Trust of NSW.

A further \$150 million over four years will fund infrastructure upgrades of their many significant parklands including more than \$22 million for its heritage-listed Royal Botanic Gardens, Mount Annan and Mount Tomah Botanic Gardens and to upgrade facilities including construction of the new Horticultural Display Centre.

At a recent meeting of Heritage Officials across Australia in May 2015, the NSW Heritage Branch shared that they are in the early stages of providing policy papers to the NSW Government on future programs and initiatives. However the NSW Government understands the connection and importance of conservation and preservation of its heritage for both the enjoyment of its local community now and into the future and for the many visitors that come to Sydney each year.

The Heritage Council of New South Wales has created a webpage entitled *NSW Heritage Tourism Online*. There are over 500 items of special significance identified throughout New South Wales and listed on the State Heritage Register (SHR) that can be visited, providing accommodation or used as a base to explore the history of NSW.