

# Murraylands

## Murraylands Integrated Regional Strategic Tourism Plan







The ***Murraylands Integrated Regional Strategic Tourism Plan*** is a partnered initiative of the Murraylands Regional Development Board, South Australian Tourism Commission, the Rural City of Murray Bridge, Mid Murray Council, the Coorong District Council, the District Council of Karoonda East Murray, the Southern Mallee District Council, Murraylands Tourism Marketing, the Murraylands Indigenous Consortium, the Houseboat Hirers Association and the Murraylands Regional Tourist Association. Upon receipt of this report, all intellectual property contained within this project reverts to the Murraylands Regional Development Board.

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- Members of the MIRSTP Project Steering Committee:
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# Executive Summary

## Introduction

The Murraylands Regional Development Board has led a partnership to develop the Murraylands Integrated Regional Strategic Tourism Plan (MIRSTP). Development of this plan has been guided by local experts and the plan will support sustainable tourism growth within the region.

The primary objective of the MIRSTP is to:

*'Provide the Murraylands with an innovative and strategic policy and planning, and critical framework that will help attract and grow investment and build capacity in sustainable tourism within the region.'*

## Vision

The development of the MIRSTP has facilitated the development of a strategic vision for the Murraylands tourism industry, which is namely:

**The Murraylands is Australia's most recognised nature based destination.**

- In 2020 a sustainable, operator and community led, tourism industry contributes 20% of gross regional product to the Murraylands economy.
- The Murraylands has high appeal to consumers, being recognised as a relaxing, fun, dynamic holiday destination.
- Consumers are attracted to the highest quality river and off river accommodation, integrated with a range of authentic and energising experiences.
- Collaboration within the industry contributes to consistency in new high quality product and service leading to increased profits for operators.

## Making a difference

The vision will be achieved by implementing the following key activities which will create a significant difference in the growth of the Murraylands tourism industry:

New products and experiences

- Development, refreshment and packaging of internationally/wholesale ready houseboating and cruise vessel packages.
- Development of compelling trail experiences notably heritage, food and the linkage of existing trails.
- Leveraging events from/on the 'SA 2010 Regional Centre of Culture' activities in Murray Bridge.
- Building new 4WD and astronomy experiences.
- Integrating the Murray Bridge Town Centre, the River Murray and key tourism assets.

## Improved infrastructure

- 4 star accommodation with water views.
- Conference facilities with water views and regional integration.
- Accommodation development including Monarto, cabins, caravan and motor home facilities.
- Improving broadband and signage infrastructure.

## Guiding principles

The guiding principles of the MIRSTP are to:

- Focus all efforts and resources on ‘the big picture’.
- Focus on opportunities and strategies that will make the biggest difference, namely that the ‘rising tide raises all boats’.
- Strengthen connection with nearby regions to support tourism development from a consumer’s perspective.
- Actively encourage collaboration within the region.
- Support active operator participation and ownership of the implementation process.
- Deliver a responsive Implementation Framework that can be amended to reflect changing regional dynamics.
- Transfer strategic leadership to operators over time.
- Retract strategic leadership from local government over time.

## Key Issues

The following key issues were identified during development of the MIRSTP:

- *Economic downturn.* To be viewed as an opportunity to change holiday making behaviour by encourage holidaying close to home and more frequent holidays as stress breaks.
- *Competitive nature of the tourism industry.* Addressed through redefining competition and utilising collaborative approaches within the tourism industry, which will provide wider benefit.
- *Relativities regarding who benefits in the region.* Regional collaboration and identify opportunities to leverage from areas to which visitors are attracted.
- *Finding the energy to leverage ideas.* Addressed through youth enterprise programs – keep youth in the region.
- *Poor consumer appeal.* Raise appeal with consumers as a destination, through new investment and ongoing new news.
- *Drought and climate change.*
- *Uptake of new technologies.*

## Strategic Rationale – Current Challenges

The MIRSTP articulates the current challenges for Murraylands tourism. In summary, those challenges are:

### Economic Climate

- The current economic contribution of the Murraylands tourism industry sector highlights an opportunity to increase yield from tourism, through longer stays and increased spend.
- Local prospects for broader regional economic growth are well evidenced. Strong activity in the construction, retail and land development sectors will drive demand for accommodation, retail and hospitality sectors.
- Global volatility is likely to influence a contraction within the tourism, and other, sectors in at least the short term.

### Social, Community and Business Challenges

- Leadership is required to encourage collaboration and overcome parochialism issues within the region as the whole region will benefit from increased visitor numbers to any area.
- Regional and cross regional support exists for collaboration within the tourism industry but most operators lack the energy or resources to work with others to implement new ideas, develop new product etc.
- The value and potential of the tourism industry in the Murraylands is not well understood, especially by community and secondary sector businesses.
- Keeping abreast of new technology and adapting internal business systems to manage an online environment will also be a key challenge for operators in the Murraylands.
- The Murraylands workforce is a diverse and complex sector that is challenged by the increasing demands of consumers, particularly in regards to service standards, quality and compliance.
- Volunteers are very active in the Murraylands but skilling is often not supported due to funding and organisational structures.
- Operators have identified the need for improved business skills.

### Murraylands Assets

- The River Murray is a tourism icon for the region and it needs to be actively supported to attract visitors who can then be encouraged to extend their visit to other destinations within the region. It will also be important to continue to address the current negative perceptions regarding low water levels in the River.

- Houseboats and river cruising are key assets which can be enhanced with further investment and they provide an opportunity to link to other attractions in the region.
- Monarto Zoo attracts a large number of visitors to the region and the industry needs to build on the profile of this key asset and encourage visitors to experience more of the Murraylands.
- Aboriginal cultural tourism is a developing product in the Murraylands and the respective indigenous communities will require further support to implement their tourism plan. This will build the capacity and self sustainability of these communities and add further value to the tourism industry.
- High profile events help to increase the profile of the region but require better regional coordination and support to link visitors to other regional attractions.
- The Murraylands is strategically located to collaborate with neighbouring regions including regions with higher consumer appeal e.g. Barossa and Adelaide Hills.

### **Marketing**

- The number of domestic day trip visitors to the Murraylands is increasing but there has been little change in overnight visitor numbers. There is an opportunity to increase yield by developing packages and targeting markets to encourage overnight stays and for longer periods.
- Research indicates that the Murraylands has low recognition and appeal to consumers with few highly differentiating attributes. It tends to be associated with the 'cash strapped' visitor type.
- The Murraylands has the highest proportion of nights spent in boats which emphasises the importance of houseboat holidays.
- Current target markets have been identified as Activity Seekers, Family Focused and Grey Tourers. The Touring and Getaway markets may have potential if consumers shift from international to domestic travel due to the global economic crisis.
- Experience Seekers are a key target market to achieve increased yield, however appealing product will need to be developed to attract this market.

### **Natural Environment**

- Due to the heavy reliance of the Murraylands tourism industry on the River Murray maintenance of water flows is crucial.
- The Mallee is significant for a number of species of mammals and birds and provides habitat for orchids, a variety of invertebrates, amphibians, cryptogams and vascular plants, including threatened species.

- Climate change is predicted to result in ongoing lower River Murray flows and changes to the Mallee environment. Further research and monitoring is required to determine the impacts of climate change on the environment and the Murraylands tourism industry.
- Sustainable tourism development in the Murraylands can utilise the unique aspects of the River and Mallee environments and create beneficial effects for the environment.

### **Development Planning**

- The zones and policy areas in some Development Plans is confusing for prospective tourism investors and the assessment of development applications for many tourism related developments is both difficult and open to interpretation.
- A whole-of-government approach to policy reform for the realisation of the tourism vision is being addressed through the Better Development Planning project.

## **Initiatives to address the challenges**

The MIRSTP acknowledges the inherent regional challenges and advocates a range of initiatives to address them. The initiatives contained within the MIRSTP include:

### **Governance and leadership**

- There is an opportunity to build on the existing strengths within the Murraylands industry through greater collaboration and partnerships to overcome industry fragmentation.
- Implementation of the plan will require the Murraylands tourism industry to work together, recognising the benefits achievable for the whole region.

### **Business and industry development**

- The Murraylands tourism industry has an opportunity to respond to a range of changing consumer needs and behaviours, leading to industry growth.
- Business development provides an opportunity to overcome issues relating to low profitability.
- As the Murraylands tourism industry is not currently well supported with coordinated access to training there is an opportunity to design and deliver training suitable for busy operators and volunteers.
- Moving forward will require responses to consumer trends including understanding and actively participating in the use of new web technologies.
- Business development will assist operators to move forward and needs to include opportunities that encourage youth to be involved in the tourism industry.

- A pilot Workforce Development strategy will clearly articulate the future skilling and employment needs of the Murraylands tourism industry.

### **Product and experience development**

- Building the tourism appeal of the Murraylands will require new investment to take advantage of opportunities to continually provide 'New News'.
- Operators will require support to develop new product and experiences, including identifying opportunities for collaboration.
- To expand the opportunities provided by regional events a coordinated strategy needs to be developed.
- Product and experience development opportunities that will make the biggest difference to regional tourism need to be implemented as a high priority.
- Support for the opportunities identified in the Ngarrindjeri Vision for Country Cultural Tourism Plan needs to be provided.

### **Infrastructure development**

- New and existing tourism product and experiences will need to be supported by appropriate infrastructure.
- There is an opportunity to improve information support for visitors to encourage longer stays within the region.
- Tourism operators require appropriate infrastructure support to develop and market their product and business effectively
- Infrastructure opportunities which will make the biggest difference to regional tourism need to be implemented as a high priority.
- Ongoing infrastructure needs to support tourism will need to be prioritised.
- The feasibility of a high quality, high profile Visitor Information and Regional Showcase Centre within the region needs to be determined.

### **Positioning and branding**

- The Murraylands tourism brand has the lowest brand appeal in South Australia.
- The Murraylands has an opportunity to build a more appealing destination for the consumer.
- Marketing and branding efforts at a State, Regional and Local level have identifiable synergies that can be further developed to ensure that consumers receive a consistent message.
- The Murraylands Brand must reflect the key and emerging attributes of the wider region.

- There is general willingness within the community to collaborate in joint marketing and branding efforts.

#### **Sustainable tourism development**

- Sustainable tourism development provides an opportunity to benefit tourism operators, local communities, the regional economy and the natural environment.
- Opportunities to highlight the need to maintain environmental flows in the River Murray through to the Murray Mouth should be utilised to support water flows for Murraylands tourism.
- There is an opportunity for the Murraylands tourism industry to proactively respond to climate change predictions by encouraging further research and planning.
- Use of the *Design Guidelines for Sustainable Tourism Development* and environmental guidelines will help the Murraylands tourism industry move towards an integrated, sustainable model which supports the community, regional development and the natural environment.

#### **Planning framework**

- Implementing the Murray and Mallee Regional Land Use Framework and the Better Development Plans project provides an opportunity for the Councils in the Murraylands to consistently update their Development Plans in relation to tourism development.
- Tourism development will be able to move forward more effectively when the confusion regarding the assessment of development applications is reduced through the use of consistent planning policies in the region.

## Implementation

The implementation of the MIRSTP has been divided into two parts. The first part, the period 2009-2010, recognises that the Murraylands tourism industry must fundamentally adapt its product offering to meet changing consumer demands and increase yield to ensure its ongoing sustainability and viability. In its second phase, the period 2011-2013, the MIRSTP must move to a broader and more strategic plane.

### Targets

The implementation of the MIRSTP will support the Murraylands region to achieve an **annual growth rate of 1.5 per cent** during **2009 and 2010** which will maintain the Murraylands regional tourism industry. From **2011-2013** the target is to grow the Murraylands regional tourism industry with an **annual growth rate of 4.5 per cent**.

The MIRSTP includes six goals:

1. Implementation of the MIRSTP is achieved via genuine, cross sectoral and active regional participation.
2. A diverse range of new products are developed specifically to increase visitor yield, stay and experience.
3. A self reliant tourism industry that has access to relevant and practical business and industry support.
4. The Murraylands tourism industry sector is supported by quality infrastructure that meets the needs of both community and visitors.
5. The Murraylands is repositioned as a region of choice that is vibrant, fun and active.
6. The Murraylands tourism industry is supported by effective environmental and planning structures.

### Actions

A detailed action plan, supported by a responsive and flexible Implementation Framework has been developed. These documents outline the key responsibilities and activities required to implement the MIRSTP.



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# Introduction

The primary objective of the Murraylands Integrated Regional Strategic Tourism Plan (MIRSTP) is to:

*'Provide the Murraylands with an innovative and strategic policy and planning, and critical framework that will help attract and grow investment and build capacity in sustainable tourism within the region.'*

Implementation of the MIRSTP will contribute to achieving South Australia's Strategic Plan 2007 tourism industry target of increasing visitor expenditure to \$6.3 billion in 2014 (T1.15).

The MIRSTP has been developed around a strong framework using economic, planning policy, market and social analyses, growth scenarios and targets, return on investment, brand strategy, development opportunities, infrastructure needs and environmental management. Research has been supported by consultation with key stakeholders and the community.

The key points from the research and consultation undertaken are included in the MIRSTP. Additional information is included in a series of background reports that have been prepared during development of the MIRSTP. These background reports are on the following topics:

- Regional Tourism Context
- Resources, Development Opportunities and Infrastructure
- Environmental Issues
- Planning Policy
- Economic Analysis
- Social, Industry and Workforce Development
- Market and Brand Analysis
- Ngarrindjeri Vision for Country – Cultural Tourism Plan
- Consultation

## Murraylands region

Murraylands is defined for the purpose of the MIRSTP as within the Council boundaries of Murray Bridge, Mid Murray, Karoonda East Murray, Southern Mallee and Coorong. This is a wider boundary than the region currently being serviced by Murraylands Tourism Marketing, as shown on map 1, but is consistent with the Murraylands Regional Development Board boundary. The Murraylands covers an area of 26,650 square kilometres with a population of 35,679 persons<sup>1</sup>.

The regional advantages of the Murraylands highlighted in the Murraylands Regional Development Board Strategic Plan 2008-2013 include the availability of relatively low cost

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<sup>1</sup> ABS Census 2006

land, proximity of the region to major road and rail services which service Adelaide, Melbourne and Sydney, the River Murray, a clean and green environment and a great climate and lifestyle. All of these advantages will support strong tourism growth in the region.

The regional disadvantages highlighted include lack of infrastructure including power, gas, and housing, limit to workforce availability, low population outside of Murray Bridge, lack of further education opportunities and poor self esteem in some sectors of the local population. Of these disadvantages a lack of suitably skilled workers in particular, may impact on tourism growth.

## Local, State and National Strategic Context

### Key Points

- High levels of collaboration within the region and with other regions will help contribute to achievement of the South Australian tourism target.
- Murraylands tourism planning will be influenced by the State tourism plan and Murray and Mallee Land Use Framework.
- Opportunities exist for the Murraylands through linking with the proposed Murray Border National Landscapes region.

The South Australian Strategic Plan tourism target (T1.15) is to achieve an increase in visitor expenditure from \$3.7 billion in 2002 to \$6.3 billion in 2014. This requires growth in the tourism sector of 4.5 per cent per annum. As this level of growth has not been achieved since 2002, annual growth of 6.2 per cent is currently required to meet the target of \$6.3 billion.

### Local Government

The Murraylands encompasses five local government areas including; Rural City of Murray Bridge, Mid Murray Council, District Council of Karoonda East Murray, Southern Mallee District Council and Coorong District Council.

Strategic planning documents have been developed by each of the five regional councils covering the period from 2005-2012. All plans address issues, policies and initiatives which are either explicitly or by inference relevant to the development of the tourism industry and the role and needs of tourism in the local economy and tourists or visitors to each council district.

### Regional Strategic Tourism Plans

The **Riverland** tourism region includes the South Australian River Murray upstream of the Murraylands region and the northern Murray Mallee. Therefore it has many similarities to the Murraylands with opportunities for the development of cross regional packages that encourage visitors to stay longer and spend more within both regions. The *Riverland Integrated Strategic Tourism Strategy* includes the goal to “enhance and grow authentic experiences” with a focus on nature-based, river and healthy lifestyle experiences which are integrated with the region’s local produce and tell the story of the Riverland.

The **Fleurieu** tourism region neighbours the Murraylands to the south west and includes the western part of the Coorong and Murray River mouth. Within the *Fleurieu Peninsula Regional Integrated Strategic Tourism Plan 2007 – 2012* is the goal “products that meet the needs of our target markets”. This goal includes several actions to work with the Ngarrindjeri people which could be delivered in collaboration with the Murraylands region to strengthen Aboriginal product trails within both regions.

The **Barossa** tourism region is near the Murraylands and provides an opportunity for collaboration that will encourage visitors to extend their holiday and spend by developing packages that include experiences in the Barossa and at the River. Some of the goals in the *Clare Valley and Barossa Tourism Regions Integrated Strategic Tourism Plan* are consistent with the Murraylands product and would appeal to a similar market. These include opportunities for connection and reinvigoration through health and wellbeing and sharing the area's rich and diverse cultural heritage. There may also be links through food and wine product trails.

Opportunities for collaboration exist with the **Limestone Coast** tourism region. This region has not yet prepared a tourism strategic plan but the Coorong District Council already works collaboratively with the Limestone Coast tourism region and the Limestone Coast region currently markets the Coorong and Lower Lakes area. This area is naturally linked to the river corridor flowing through the Murraylands and provides opportunities for collaborative marketing and product development e.g. Aboriginal educational tourism, nature based and water activities.

The **Adelaide Hills** tourism region links the Murraylands to Adelaide and although this region has not yet prepared a tourism strategic plan there are likely to be opportunities for collaborative marketing and package development to encourage visitors to experience product in the Adelaide Hills, across the plains (e.g. Monarto Zoo) and at the river.

## **South Australian Tourism Plans**

South Australia's Strategic Plan, Tourism Implementation Plan (SATC, 2008) highlights that domestic tourism comprises 94 percent of South Australia's visitors, 74 per cent of visitor nights and 88 per cent of visitor expenditure. It is recognised that there will be some challenging times ahead for tourism which will fuel aggressive competition between tourism destinations. There are also opportunities for those that recognise and work with the trends to pursue focused and cohesive strategies.

It is highlighted in the South Australian Tourism Plan 2009-2014 (SATC, 2009) that the tourism industry can proactively shape the future by controlling what it can and adapting to what it cannot. By understanding the strategic context of the industry more effective decisions to guide future growth can be made. Marketing alone will not increase tourism growth sufficiently to meet the State tourism target. Improving access and developing a more appealing South Australia of tomorrow through experiences, infrastructure and events will also be required.

The vision of the SA Tourism Plan is "by 2020 South Australia will have capitalised on its massive tourism potential and will be a world's best destination supporting a sustainable and profitable industry".

The critical interdependent success factors identified for tourism are communicating the best of what South Australia offers today with a compelling brand message, getting more planes to land in South Australia, developing a more appealing South Australia of tomorrow and aligning the 'rules' or policy with the vision.

The SA Tourism Plan includes the four focus areas of Develop, Leverage, Activate and Communicate with 14 ideas within these.

Achieving success includes giving priority to attracting investment capital into regional South Australia and into events. This includes further developing areas of raw appeal in key areas such as the River Murray.

## **Murray and Mallee Regional Land Use Framework**

Still under development the Murray and Mallee Regional Land Use Framework establishes and sets the ground work for regional development. It addresses issues such as infrastructure and services, transport corridors, township development, the environment and economic development. The framework includes the Riverland and Murraylands areas.

Tourism is specifically addressed in the context of economic development although the impact of tourism on the environment, services and infrastructure is taken into account. It is recognised that tourism is an important and growing element of the region's economy with river based recreation being the most important contributor. The draft framework recommends that an integrated plan be developed to guide expansion of tourism in the region.

## **National Landscapes**

National Landscapes is a partnership between conservation (Parks Australia) and tourism (Tourism Australia) to promote superlative world-class Australian landscapes and experiences to the global Experience Seeker. The big picture tourism strategy is to position "Australia" as the brand and destination for Experience Seekers to reconnect in life through the unique and contrasting experiences. The Tourism Australia marketing strategy is about story telling within authentic Australian places where visitors can reconnect with themselves. It is recognised that experiences need to provide a unique point of difference.

The Murray Border region is currently being developed as a potential National Landscape and overlaps into the Murraylands tourism region. Although not every business and product in the Murray Border region will be directly involved it is anticipated there will be significant tourism echo benefits and new product development opportunities for operators. These benefits are likely to extend beyond the Murray Border region and provide opportunities for the Murraylands.



# Strategic Rationale

## Murraylands tourism challenges – an overview



# Economic Climate

## Key Points

- Current sector contribution highlights an opportunity to increase yield from tourism, through longer stays and increased spend.
- Local prospects for broader regional economic growth are well evidenced. Strong activity in the construction, retail and land development sectors will drive demand for accommodation, retail and hospitality sectors.
- Global volatility is likely to influence a contraction within the tourism, and other, sectors in at least the short term.

The national and global economic climate will influence tourism growth in the Murraylands. With a strong economy there is high consumer confidence and discretionary spending. Key drivers of instability have been identified as fluctuating exchange rates, increasing inflation, increasing oil and fuel prices, economic growth of Asian countries, increasing levels of household debt and more consumer spending substitutes for tourism.

Currently the economy is in decline with lower consumer confidence likely to reduce discretionary spending. However this may be considered an advantage for the Murraylands due to its close proximity to Adelaide and consumers are likely to seek a lower cost, more affordable holiday.

## Sector contribution

The Murraylands tourism industry sector generates:

- 5% of total State visitor expenditure but 8% of total State visitors – expenditure per visitor is amongst the lowest in the State (domestic and overnight).
- Domestic day trip expenditure \$55 (below \$86 State average).
- Total expenditure in the region estimated at \$122m (or 6.2% of the total Murraylands gross regional product).
- Tourism related employment estimated at 1,117 jobs (or 7% of the workforce).

Tourism presents an opportunity for further industry development to compliment the existing industry base of agriculture, manufacturing and retail sectors that already exists in the region.

## Growth scenarios

An analysis of the impact of the tourism industry sector on the Murraylands economy was undertaken as part of the strategic deliberations for the MIRSTP. Four scenarios were modelled and they were:

- A decline in tourism expenditure of 1.5 % per annum.
- Maintenance of the current level of tourism activity, with no job losses, requires annual growth of 1.5%.
- Growth being consistent with national domestic forecasts, annual growth of 0.9%
- Growth being consistent with a realistic attempt to meet SA Strategic Plan, annual growth of 4.5% (noting that a growth of 6.3% is required to meet SA Strategic Plan target).

The impact, on the Murraylands economy, of these four scenarios is detailed in the background report *MIRSTP Economic Analysis* prepared by Econ Search Pty Ltd. A decline in tourism expenditure of 1.5% per annum would result in about 250 job losses, a population loss of 754 persons and an \$18.1m decrease in gross regional product. However achieving tourism growth of 4.5% will create 320 new jobs, increase the population by 670 persons and increase gross regional product by \$30m.

## Current realities

In 2008, the development of the MIRSTP recognised that locally, there was evidence of retraction in employment and tourism expenditure. And while, the MIRSTP is not able to quantify these losses, there has been much anecdotal evidence supplied by tourism operators during consultation.

However, it is important to also compare the anecdotal losses with predicted jobs growth, evidenced by the *Murraylands Jobs and Investment Forecast 2009-2011* that identified (based on local employer predictions) the creation of 162 new jobs (over three years) in the hospitality industry sector.

More importantly, during the 2011-2013 period, it is anticipated that the Murraylands region will observe significant construction, retail and land development growth as many major projects are realised. As projects like the Mobilong Secure Precinct, Racing Precinct (Housing and Track Development), South Terrace Retail Precinct and Mannum Waters are implemented, demand for retail, hospitality and accommodation will rise sharply. Ongoing demand in the retail, hospitality and accommodation sectors is also anticipated as population growth is also likely to stimulate increased demand from visiting friends and relatives.

With the volatility in the global economy and a likely, short term, contraction in the local economy, it is imperative that the MIRSTP is developed with enough flexibility to accommodate a changeable operating environment.

# Social, Community and Business Challenges

## Key Points

- Leadership is required to encourage collaboration and overcome parochialism issues within the region, recognising that the whole region will benefit from increased visitor numbers to any area.
- Regional and cross regional support exists for collaboration within the tourism industry but most operators lack the energy or resources to work with others to implement new ideas, develop new product etc.
- Value and potential of the tourism industry in the Murraylands is not well understood, especially by community and secondary sector businesses.
- Keeping abreast of new technology and adapting internal business systems to manage an online environment will be a key challenge for operators in the Murraylands.
- The Murraylands workforce is a diverse and complex sector that is challenged by the increasing demands of consumers, particularly in regards to service standards, quality and compliance.
- Volunteers are very active in the Murraylands but skilling is often not supported due to funding and organisational structures.
- Operators have identified the need for improved business skills.

The social environment of the Murraylands influences industry, business and community attitudes to tourism. The values and aspirations of the community will guide the development of the Murraylands Brand, tourism product and experiences.

Murraylands residents have a great sense of pride in their region and their way of life and their capacity to respond to adversity. Despite this regional pride the irony remains that the rigors of rural life and the effects of cyclical drought can produce a defensive approach and cautious attitude towards new ideas and what the future holds. This has created some parochialism and conflict between communities and scepticism of the value of tourism.

## Community perceptions

Tourism operators and products do not function in isolation and are not removed from the broad community and local environment. Communities at large do not recognise that they are all participants in the tourism economy and have roles to play in positive visitor experiences and promotion of return visits.

Increased awareness is required to reinforce the special/unique and marketable qualities of the region and to highlight that all community members can contribute to the success of tourism. The local community has an important role to play in encouraging visitors to come

to the region and to enhance their experience, making the Murraylands a fun and friendly place to visit.

During consultation it has been noted that the Murraylands community has a willingness to share the qualities of their rural life. These include the River, natural resources, farming life, events and recreational activities. Environmental factors including open skies, sunsets and stars are highly valued.

Communities consider that tourism offers employment prospects for young people, potential for expansion of existing businesses and opportunities to highlight key features within each region including natural resources. Although not always recognised, tourism offers opportunities to enhance facilities for the benefit of local people and visitors alike.

### **Aboriginal communities**

Murraylands Aboriginal communities have been actively involved in tourism development. It has been identified that there is potential for expansion of Aboriginal tourism facilities in the region and there is strong interest among the Ngarrindjeri people to support this expansion. It is recognised that expansion provides an opportunity to share local culture and stories. Employment opportunities will also become available, although training will be required to address skill shortages.

### **Community participation**

There is increasing support required by communities to provide funds and in kind support to tourism. Already, highly successful events across the Murraylands have developed through the inspired and dedicated efforts of individuals and local communities. These events bring many visitors to the region and consideration needs to be given to developing a strategy for succession planning and support staff to enable these events to continue to develop. With implementation and management support for an expanded events calendar in the region the Murraylands could become a regional events hub.

### **Business perceptions**

Tourism businesses support collaboration and coordination for the growth of the industry but there is currently limited practical application or desire to be actively involved in collaborative approaches. Leadership within the tourism industry is required to overcome the fragmentation that currently exists. A collaborative approach needs to be developed which adds value to all participants with an increased understanding of the value chain.

Community aspirations towards tourism, while genuine are not broadly and enthusiastically supported. The MIRSTP community consultation process was not supported by large numbers of participants, rather a committed minor core. Within the Murraylands, the further development of the 'tourism industry' is more likely to be supported by women over the age of 40 years. (Community Attitudes Survey, McGregor Tan Omnibus Survey, 2001).

Community apathy towards tourism is also further evidenced by the very low levels of engagement from 'secondary' tourism industry participants (bakeries, deli's, hotels) in the MIRSTP community consultation process.

## Industry structure

The Murraylands tourism industry is comprised of mainly small business operators and the industry database maintained by the Murraylands Tourism Marketing organisation includes over 300 contacts. Tourism Research Australia profiles<sup>2</sup> indicate that there are over 700 businesses linked to tourism (directly and indirectly) in the MTM area with half of these not employing staff and less than two per cent employing 20 or more staff.

The Murraylands tourism industry has a reliance on smaller 'cottage style' operations which do not have consistent and independent quality standards. It has become evident that overall, there is a decline in product and service quality standards. Operators are aware of the need to develop new products and experiences, however they are too busy 'staying alive' to make the changes required for growth.

State and National tourism strategies generally identify tourism businesses as having low profitability and poor access to capital. Investment in tourism is typically seen as risky.

The tourism industry sector, at both a local and national level, is operating in uncertain and changeable times with rising costs in labour, input products, insurance and compliance. External challenges such as ongoing water shortages, climate change and the threatening global crisis all must be adapted to and addressed.

At a national level, there are a number of **industry wide trends** that include:

- Decline in product and service quality. From a consumer's perspective, tourism product and service quality is viewed as unpredictable.
- Staffing and skill shortages.
- Increasing demand for on-line distribution systems. This include the now almost mandatory online booking services through to the emerging net 2.0 tools such as blogs, i-google alerts, facebook and my space sites which can influence the destination choice of consumers.
- Poor returns on investment. Tourism is perceived to deliver lower rates of return on both capital and business investments.
- Competition. In addition to internal tourism business based competition, the sector competes with international destinations, consumer goods and the changing trends in the labour market.

At a local level, industry consultation was undertaken both formally and informally during the development of this strategy. The business and industry development themes that were identified were consistent with a small, and largely underdeveloped, industry sector.

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<sup>2</sup> From *Tourism Profiles for Local Government Areas in Regional Australia, Rural City of Murray Bridge, District of Mid Murray and District of Southern Mallee, (Tourism Research Australia, 2008)*

## Industry leadership

The industry suffers at a national and local level due to a lack of industry led, strategic management. This lack of leadership is due to poor coordination and cohesion and is a direct result of the significant number of small to medium sized enterprises within the industry's structure.

Within the Murraylands, there are a number of existing groups that aim to facilitate improved tourism outcomes. They include the Mallee Tourism Networking Group, Murraylands Regional Tourist Association, Murraylands Tourism Marketing, Murray Bridge Business and Tourism, Houseboat Hirers Association and Boating Industry Association of South Australia.

Regional Tourism Associations and Committees exist for a range of reasons including to encourage increased visitation, extended lengths of stays and maximum visitor spending. They provide a forum for like-minded business people to enhance their marketing effort. They aim to ensure visitors experience the highest possible level of satisfaction with product and services offered in the area and encourage appropriate consideration and planning for tourism development.

Murraylands Tourism Marketing is funded by the SATC to prepare and implement a regional marketing plan. Some of the core elements of this include producing a regional guide, supporting and participating in consumer holiday and travel shows.

Some organisations are focussed on supporting tourism businesses in specific locations e.g. Mallee Tourism Networking Group and Murray Bridge Business and Tourism. Other organisations provide leadership and support specific tourism sectors e.g. Houseboat Hirers Association and Boating Industry Association of SA.

There are a number of other business groups that also aim to improve business attraction, performance and retention. They include Murraylands Enterprise Estate, Taillem Bend & Districts Development Group, Cadell Community & Tourist Association, Swan Reach Progress Association, Mannum Progress Association, Tintinara Regional Areas Development Enterprises Inc, Meningie Progress Association, Karoonda Development Group, Pinnaroo Inc, Primary Production Manufacturing and Processing Group, Primary Production and Packaging, Murraylands Manufacturers Alliance and others.

## Workforce Development

During the development of this strategy, community and operator consultation provided that there was evidence of retraction in employment and tourism expenditure. Put simply, there is much anecdotal evidence to support that within the Murraylands operators are downsizing, retracting staff and doing more with less as revenues decline.

However, during the same period, the Murraylands Regional Development Board released its *Murraylands Jobs and Investment Forecast 2009-2011* that identified (based on local employer predictions) the creation of 162 new jobs (over three years) in the hospitality industry sector.

## Workforce profile

At a local level, the tourism industry is almost entirely comprised of small operators. A further challenge for the local tourism industry is the diversity of skills and competencies required to deliver service in a multi-disciplinary environment. Within the Murraylands, the tourism workforce is comprised of high level professionals, private self trained operators, vocationally skilled members of the hospitality industry, casual employees in a range of services, highly trained professionals from veterinary, business management, marketing, environmental management, volunteers co-ordination and tour guiding at the Monarto Zoological Park.

The local tourism industry sector is also heavily reliant upon volunteers. Volunteers play significant roles in providing information, assisting visitors, contributing to site and project development and management and staffing of museums and galleries.

Key sectors within the Murraylands tourism workforce include:

- Monarto Zoological Park.
- Houseboat Industry
- Paddle wheeler and large River craft Fleet
- Accommodation sector
- Cultural tourism
- Ngarrindjeri Cultural Sites

Further information about each of these sectors is provided in appendix 4.

## Local workforce development issues

During MIRSTP community and industry consultation process it became evident that there were a range of local workforce development issues. These issues are not unique to the Murraylands, but they do provide a clear summary of the challenges faced by the local industry sector.

The Murraylands tourism workforce is a diverse and complex sector that is characterised by highly casualised and multidisciplinary workforce. The workforce, across its continuum is challenged by the increasing demands of consumers particularly in regards to service standards, quality and compliance.

Community members and operators consistently identify the need for improved customer service programs, such as the Aussie Host model, as a means to improve industry standards. There is also an identified need to increase professionalism, particularly the inherent marketing message right across the workforce continuum. This is not limited to brochures and websites, but also understanding of the Murraylands brand, its message and audience.

Consumer demand is fuelling the need for increased on-line booking, marketing and information services. The Murraylands tourism workforce lacks skills, knowledge and practical applications in this area.

There is a heavy reliance on volunteers within the Murraylands and skilling of these volunteers is often rudimentary or not supported due to funding and organisational structures.

Operators self identify the need for improved business skills, particularly in the areas of business planning, analysis and marketing, however, in region skilling opportunities, in these higher order skills, are limited or non existent.

### **National workforce development issues**

A range of national and state based tourism industry strategies argue for the need to increase training and skill levels in the tourism labour force through education, training and accreditation that targets industry needs.

The national tourism industry requires the development of a workforce with the skills and capabilities, attitudes and educational qualifications that match market needs. A necessary precursor to this development is the identification of tourism labour shortages and skills and training gaps at the local level.

However, both national and local workforce development efforts will be impacted by increasing skill and labour shortages, high staff turnover, retirement and succession planning of baby boomers and changing attitudes to careers and work/life balance.

One way to develop business productivity is through developing the industry's human resource practices to increase labour attraction and retention. It is clear that the tourism industry must:

- Promote tourism career pathways and opportunities.
- Encourage lifelong learning.
- Develop accreditation and excellence awards (particularly for volunteers).
- Improve working conditions and wages.
- Provide and encourage staff to take annual leave.
- Ensure tourism jobs are more stable (regular hours/reduce seasonality).

# Murraylands Assets

## Key Points

- The River Murray is a tourism icon for the region, and needs to be actively supported to attract visitors, who can then be encouraged to extend their visit to other destinations within the region. It will also be important to continue to address the current negative perceptions regarding low water levels in the River.
- Houseboats and river cruising are key assets which can be enhanced with further investment and they provide an opportunity to link to other attractions in the region.
- Monarto Zoo attracts a large number of visitors to the region and the industry needs to build on the profile of this key asset and encourage visitors to experience more of the Murraylands.
- Aboriginal cultural tourism is a developing product in the Murraylands and the respective indigenous communities will require further support to implement their tourism plan. This will build the capacity and self sustainability of these communities and add value to the tourism industry.
- High profile events help to increase the profile of the region but require better regional coordination and support to link visitors to other regional attractions.
- The Murraylands is strategically located to collaborate with neighbouring regions including regions with higher consumer appeal e.g. Barossa and Adelaide Hills.

The resources of the Murraylands are the key assets that can be utilised to develop tourism product and experiences. They will also underpin marketing and brand development.

The Murraylands is principally a self-drive destination, located within one hour's drive from Adelaide. It provides a choice of fun and relaxing experiences which can be accessed readily within a day visit or during longer stays. The region is large, with wide open spaces providing opportunities for star gazing and relaxation within unique landscapes.

Most activities are linked to the natural environment and cultural heritage of the region. The River Murray currently defines the Murraylands region and is the focus for water based recreation activities (water sports and fishing), ferry crossings and unique houseboat accommodation and cruising experiences. In the lower River Murray area, Lake Alexandrina, Lake Albert and the Coorong are unique areas strongly linked to Aboriginal culture. It will be important to ensure collaboration occurs with neighbouring regions and Aboriginal communities to further develop opportunities in the Lower Lakes and Coorong.

As the tourism industry is heavily dependant on the natural environment it is subject to issues related to loss of environmental value including impacts of climate change, perceptions of low water levels, loss of access to key assets (e.g. wetlands, boat ramps).

Restrictions on development in natural environments can impede tourism development and willingness to invest.

## **Houseboats and Cruise boats**

The houseboat industry is a South Australian tourism icon. It is marketed strongly as the perfect holiday location for relaxation, indulgence, recreation and a River Murray experience. The Murraylands houseboat industry includes about 100 boats with another 100 in the Riverland. Major houseboat marinas and moorings are at Mannum and Murray Bridge. Mannum is promoted as the houseboat centre of Australia. Houseboats provide from 8 to 12 berths and cater for economy budgets to high luxury end. The houseboat industry has an international reputation attracting visitors from Europe and New Zealand and the United States.

The houseboat industry is facing a downturn with a 60 per cent fall in occupancy during the last two years. This is mainly due to negative publicity about the River but other reasons may also have contributed. The fleet is getting older and needs new investment, including the development of new product. The range of quality houseboats and size and capacity of the fleet represents a major investment in the tourism industry in the Murraylands and a significant part of the regional economy which could be expanded. A study conducted in 2004 estimated the potential gross economic value of the houseboat industry in South Australia (Murraylands and Riverland) at close to \$36 million with another \$25.2 million associated with private recreational houseboats.

There are also a range of boats offering various cruising options on the River. These range from short cruises to week long cruises. These cruises offer a range of accommodation including high luxury and a range of activities, including side tours to attractions within the region or a focus on ecotourism (wildlife, river environment, aboriginal culture).

## **Monarto Zoological Park**

Monarto Zoological Park attracts a large number of visitors to the region each year. This is a key asset for the Murraylands, providing world class site management and breeding programs for endangered species. Monarto is funded by State Government, gate takings, programs and sponsorship and is developing a strong events program to increase profile and expand visitor numbers which were around 108,000 in 2007. Visitors comprising family groups were drawn primarily from Adelaide, regional South Australia and the eastern states. More recently, Monarto has announced its intention to create 5 star, safari style, accommodation. When realised, this will attract international and higher yielding visitors to the region.

## **National and Conservation Parks**

There are immense natural resources within the Murraylands, including Mallee Conservation Parks with unique plants and wildlife, wetlands, reserves and aboriginal assets. The Coorong National Park is an International Wetlands Ramsar site. These nature based assets and attractions have not been developed for tourism and are not being utilised effectively to add

value to tourism experiences. Conservation Parks and the opportunities they provide are not well known.

## Aboriginal cultural tourism

Currently there are five major Ngarrindjeri tourism sites located in the Murraylands:

- Ngaut Ngaut
- Pomberuk Cultural Centre
- Raukkan
- Camp Coorong Race Relations Education and Recreation Centre; and
- Coorong Wilderness Lodge

Each presents different elements of the Ngarrindjeri story. The five sites are in different stages of development. Each site currently operates independently.

Collectively the five sites present a comprehensive tourism experience designed to promote understanding of the fundamental vision, goals and unique qualities of the Ngarrindjeri people of the Lower River Murray, Lower Lakes and the Coorong.

The Murraylands Indigenous Consortium has facilitated the development of the *Ngarrindjeri Vision for Country – Cultural Tourism Plan* (included as appendix 11). This plan has been developed in discussions with custodians of Ngaut Ngaut, Pomberuk, Raukkan, Camp Coorong and Wilderness Lodge. The SATC *Aboriginal Cultural Tourism Strategy 2007- 2010* has been the major source of policy direction.

## Culture and heritage

The achievements of the Murraylands pioneers and early farming communities are profiled in the range of interesting and informative collections and interpretation centres across the region. Art and craft galleries are also features of many towns and culture and arts will become a highlight in the future as Murray Bridge focuses on developing culture and the arts during 2010. It is important to ensure these museums and galleries are linked across the Mallee and along the River to draw tourists from the major highways into the real life of the Murraylands. The preservation of significant historical sites and buildings needs to be considered to secure future tourism growth.

## Recreation

There are numerous sporting clubs and facilities across the Murraylands. These support both water and land based activities e.g. tennis, golf, football, sailing and rowing. Motor sports are also a key feature of the region and the Murray Bridge (Horse) Racing Club conducts regular carnival events. The proposed new Racing Precinct will position Murray Bridge more strongly as a racing centre. Existing walking trails and tracks offer alternative options for outdoor seekers. Sporting clubs and facilities are currently not utilised effectively to add value to core tourism experiences. Most towns have playgrounds and reserves which can provide value to tourism.

## Events

The Murraylands conducts a wide range of events which provide for local communities and attract large numbers of visitors with special interest. Murraylands Tourism Marketing listed 58 events and activities conducted across the region in the first six months of 2008. These events and activities are strongly supported by communities, clubs and councils and attract numbers of visitors and add to the vitality of the region. High profile events, including the pedal prix, auto fest, Murray Bridge horse racing carnivals. Karoonda Farm Fair, Mannum Houseboat Open Day and many others help to increase the profile of the Murraylands.

However these events do not necessarily have a positive impact on local business. Events throughout the region are not always effectively scheduled and promoted in an integrated manner.

## Visitor Information Centres

Although the internet is a key source of information for visitors prior to planning a trip, it has also been noted that almost half of travellers arrive in an area without having booked accommodation and more than 90 percent have not booked tours or decided where they will eat or what attractions they will visit. Therefore Visitor Information Centres (VICs) can play an important role in influencing the choices tourists make.

Accredited VICs within the Murraylands are provided at Murray Bridge and Mannum with unaccredited centres at Pinnaroo, Tailem Bend and Tintinara. Other accredited centres are located at Bordertown, Strathalbyn, Goolwa, Loxton, Berri, Renmark, Tanunda and Hahndorf. Accredited VICs maintain current and high quality promotional materials, travel guides and maps which focus on local and regional accommodation, events and activities and broader intrastate and interstate holiday information. Centres are generally staffed by trained managers supported by volunteers with significant local knowledge and abilities to assist travellers.

## Accommodation

Visitors to the Murraylands have a wide choice of accommodation from camping grounds, caravan parks, holiday cabins, motels, hotels, bed and breakfasts, holiday shacks, rental holiday homes and houseboats. The standard of accommodation varies from the high luxury end to simple family style cabins and caravan parks. However most of this accommodation is considered to be of lower quality. The standard of accommodation is a key concern as the market now has higher expectations and facilities and services need to be upgraded to adequately to meet these expectations.

## Food

The Murraylands has a well established and diverse economy based upon agriculture, horticulture, manufacturing and strong service and business sectors. Food outlets within the Murraylands range from high quality to basic menus suitable for travellers on a low budget. High quality food outlets including fine dining are limited. There is also minimal profiling and

use of locally produced and processed food products. Travellers need to be made aware of the opportunities to purchase from food outlets in smaller towns.

## **Location and Diversity**

The Murraylands is in a strategic location and is surrounded by some appealing tourism regions, including the Barossa, Fleurieu Peninsula and Adelaide Hills (refer to map 8). It also provides a gateway to the Riverland, Limestone Coast and the Victorian Mallee. The strategic location of the region is an underutilised and unrealised resource. The preceding list highlights the diversity of resources within the Murraylands which offers strong prospects for collaboration, both within and beyond the region. Opportunities to link within the region and with other regions on a thematic basis (e.g. nature based, heritage, aboriginal culture, food and wine) are not being fully utilised.



# Marketing

## Key Points

- The number of domestic day trip visitors to the Murraylands is increasing but there has been little change in overnight visitor numbers. There is an opportunity to increase yield by developing packages and targeting markets to encourage overnight stays and for longer periods.
- Research indicates that the Murraylands has low recognition and appeal to consumers with few highly differentiating attributes. It tends to be associated with the 'cash strapped' visitor type.
- The Murraylands has the highest proportion of nights spent in boats which emphasises the importance of houseboat holidays.
- Current target markets have been identified as Activity Seekers, Family Focused and Grey Tourers. The Touring and Getaway markets may have potential if consumers shift from international to domestic travel due to the global economic crisis.
- Experience Seekers are a key target market to achieve increased yield, however appealing product will need to be developed to attract this market.

Murraylands Tourism Marketing (MTM) has prepared a marketing strategy and an annual marketing plan to implement this strategy. A significant amount of research has been undertaken to prepare these plans, which has contributed to providing a solid background to identify the target market for the MIRSTP.

The key Murraylands tourism target markets identified by MTM are Activity Seekers, Family Focused and Grey Tourers. These groups include Adelaide day-trippers (families, older couples, visiting friends and relatives), short break (young couples, families, caravan and camping), recreational visitors (anglers, water sport enthusiasts), nature based (nature lovers, birdwatchers, bushwalkers) and, coaches and groups (senior citizens, social groups).

The SA Tourism Plan has identified higher yield travellers as the key consumer market for South Australia. Although this group is only 14 per cent of the population they account for 78 per cent of total travel expenditure. They are defined as travellers who spend more than \$2,000 in total on a holiday or \$200 per person night and are known as 'Experience Seekers'.

It is suggested in the SA Tourism Plan that by focusing marketing on the Experience Seekers, other travellers are likely to follow. Currently South Australia has low appeal for this group (mainly from Sydney and Melbourne) and development of more appealing experiences and improved communication is required. A clear message is essential, with relevant and compelling experiences, which exceed expectations.

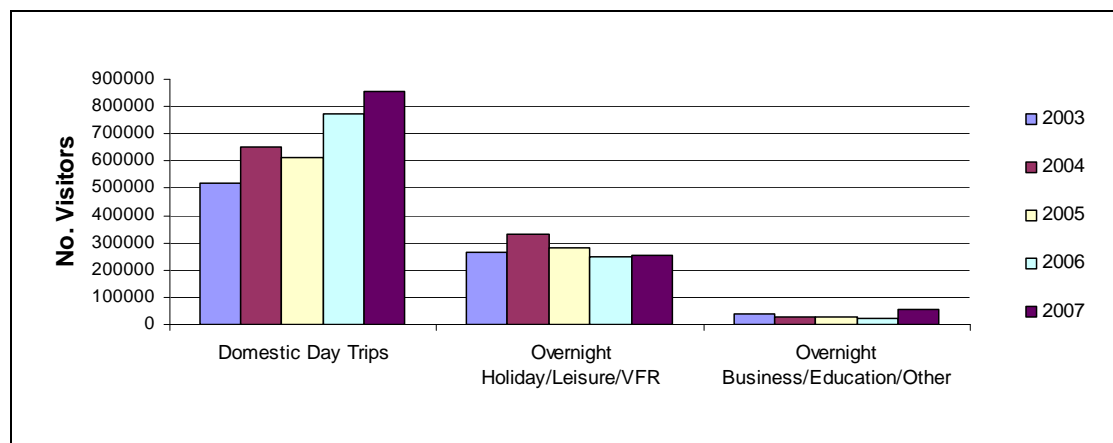
Due to the current global economic issues there may be a shift from overseas travel to domestic travel. This shift would favour targeting the Touring holiday market segment. The Getaway (1 to 2 week holiday within a location, to escape and unwind) could be targeted to increase yield through length of stay.

## Visitor profile

The Murraylands Regional Tourism Profile is prepared by the South Australian Tourism Commission Research Unit annually. Information from the 2003 to 2007 profiles has been used to gain an understanding of the Murraylands regional profile. The Murraylands profiles do not include visitor information for the Coorong Council area which is included in the Limestone Coast regional profile.

As shown in the graph below, from 2003-2007 the number of domestic day trip visitors to the Murraylands has increased about 60 per cent, with over 850,000 visitors during 2007. However there has been little change in the overnight visitor numbers with about 300,000 overnight visitors during 2007. The length of visit to the region has remained similar at an average of 2.8 nights since 2003.

*Murraylands Market Structure 2003-2007*



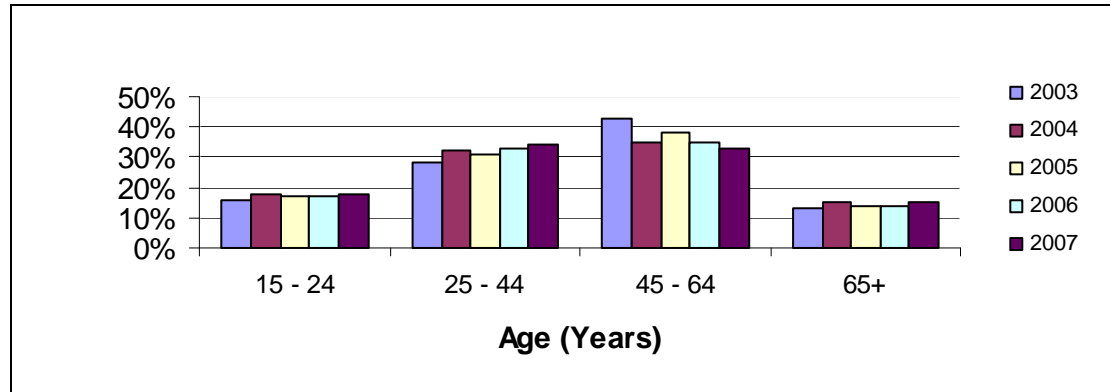
The Murraylands has the highest proportion of nights spent in boats which emphasises the importance of houseboat holidays. Over 40 percent of visitors stayed with friends or relatives or in their own holiday home. Occupancy rates of hotels/motels and caravan parks ranges from 40 percent to 57 percent with lower rates in smaller hotels/motels. Sixty percent of visitors are from Adelaide and 21 percent from regional areas (mainly adjoining regions) with 19 percent visiting from Victoria<sup>3</sup>. The two key activities undertaken by domestic visitors to the Murraylands are visiting friends and relatives and, water activities and other sports or holiday and leisure.

The age of visitors to the Murraylands has changed slightly since 2003 with approximately 15 per cent more people visiting from the 15-24, 25-44 and 65 plus age groups and 20 per cent less people visiting from the 45-64 year old age group. The most common age groups visiting are 25-44 and 45-64 years as shown in the graph below. A higher proportion of 15-

<sup>3</sup> From *Murraylands Regional Tourism Profile 2007* (SATC)

24 year olds (18 percent<sup>4</sup>) visit the Murraylands than other regions, which represents a strong representation of younger visitors who are visiting as groups of young single friends. Other key travel groups are adult couples and families of parents and children.

*Domestic Holiday/VFR Visitors to Murraylands (not including Coorong) by Age 2003-2007*



International visitation to the region is low at two percent of total visitors and three percent of overnight visitors. International product currently exists, e.g. houseboats and cruise boats, but is limited and needs further development. Interest in the experiences offered by the River has already been demonstrated. Developing product which appeals to the domestic Experience Seeker is also likely to appeal to the International visitor.

## **Murraylands appeal and brand recognition**

It is highlighted in the *Regional Branding Research Report* prepared by Sweeney Research for SATC that the Murraylands has the lowest level of appeal of all the South Australian tourism regions, with 59 percent of survey respondents rating the region as very or fairly appealing and 32 percent rating the region as not very or not at all appealing. Overall the region has a relatively low profile and is not well thought of by those who do know about it, which may make it difficult to promote. The research indicated that the Murraylands is slightly more attractive to the younger market (18-34) and the older market (55+), although appeal is still lower than for other regions.

When respondents were asked what they think about the regions they associated the Murraylands with catering for water sports, nature and wildlife, spectacular scenery, good for a weekend escape and, quiet and peaceful. The Murraylands is also considered as ecologically significant, provides great caravan and camping opportunities, great fishing, a link with the past and has a wide diversity of things to do.

An analysis of the results indicated that the Murraylands is poorly differentiated as it does not have many highly differentiating attributes. The analysis identified the key strengths of the Murraylands as water sports, fishing, ecologically significant and great caravan and camping opportunities. It should be noted that survey responses related to specific words and phrases provided by the surveyor, so may not have identified all of the key strengths e.g. houseboating and river cruises. The research also highlighted that the Murraylands is closely aligned to the 'cash strapped' visitor type.

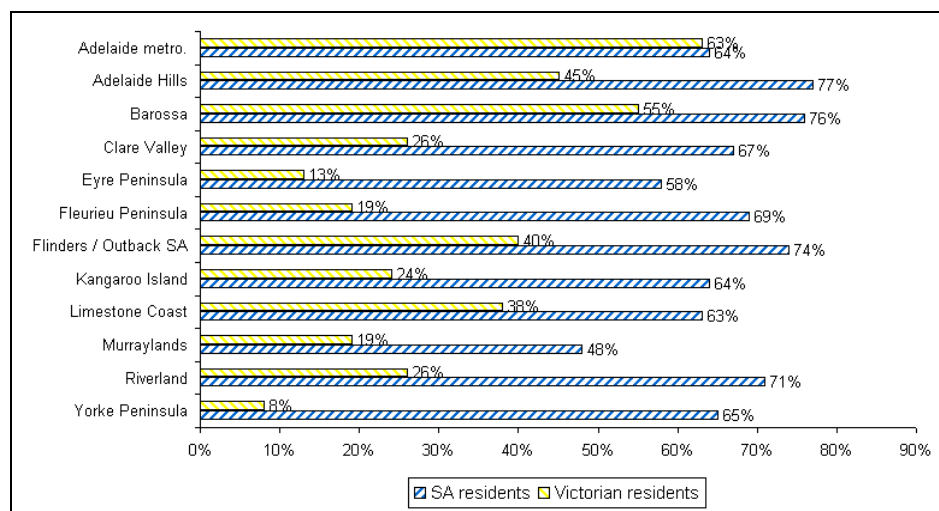
Consultation with focus groups in Adelaide (18 people), commissioned by SATC in 2008, highlighted that the main reason for visiting the Murraylands region was the close proximity to Adelaide. Younger visitors associated the River with water activities and group socialising and older visitors have broader interests and prefer quieter pursuits.

The consultation also highlighted that there is a low awareness of regional tourism boundaries with people referring to 'the River', 'the Mallee' or specific towns. It was noted that in deciding to visit the region, different people are responding to different stimuli and seek different experiences when visiting, therefore targeted marketing is difficult.

### Current Brand Position

Market research also undertaken by Sweeny Research for the South Australian Tourism Commission in 2000 found that the region was closely associated with the River Murray. This is not surprising, as the River is the most prominent tourism feature of the Murraylands region. Currently the Mallee sub region does not contain sufficiently developed quality tourism products to establish itself as a distinct tourism brand. However, the attractions and experiences it offers are seen as complementary to those available in the River sub region.

### Current Brand Strength



Source: South Australian Tourism Commission – Regional Branding Research 2000

At 48 per cent, Murraylands has the lowest brand strength among South Australian residents, with the lowest combined recognition and appeal of any South Australian region. Brand strength with the Victorian residents was also low at just 19 per cent.

The February 2005 omnibus survey of Adelaide residents indicated that 80 per cent of Adelaide residents know little or nothing about the Murraylands region, compared with 64 per cent for the Riverland and 58 per cent for the Fleurieu Peninsula region.

## Collaboration

Competitors or potential partners for collaborative marketing and packaged product/experience development are the Riverland (River Murray) and Fleurieu Peninsula and Limestone Coast (Coorong), as well as the neighbouring regions of the Adelaide Hills and Barossa. Cooperative marketing needs to focus on experience, rather than destination e.g. promote the qualities of experiences along the entire river. Collaborative marketing of the River Murray currently occurs with the Riverland, including television projects, brochures, and shared stands at relevant consumer shows and promotions and more recently the 2009 Murray River Guide.

## Target market motivations

The current Murraylands target market of Activity Seekers, Family Focused and Grey Tourers has a range of motivations for travel which include:

- A day out with the family.
- To discover something new.
- To show interstate/international visitors around SA.
- Relax, unwind and get away from the everyday grind.
- Spend time with each other and/or the children.
- To enjoy the Murray River and all it has to offer.
- An enjoyable day out that's not too expensive.
- Experience native flora/wildlife, the great outdoors and the River and Mallee environments.

These motivations will influence regional marketing. There is also potential to expand tourism in the Murraylands through niche marketing. Some of the niche markets that have potential in the Murraylands are birdwatching (River and Mallee), nature based tourism and cycle tourism.



# Natural environment

## Key Points

- Due to the heavy reliance of the Murraylands tourism industry on the River Murray maintenance of water flows is crucial.
- The Mallee is significant for a number of species of mammals and birds and provides habitat for orchids, a variety of invertebrates, amphibians, cryptogams and vascular plants, including threatened species.
- Climate change is predicted to result in ongoing lower River Murray flows and changes to the Mallee environment. Further research and monitoring is required to determine the impacts of climate change on the environment and the Murraylands tourism industry.
- Sustainable tourism development in the Murraylands can utilise the unique aspects of the River and Mallee environments and create beneficial effects for the environment.

Tourism and recreation in the Murraylands is strongly linked to the natural environment especially in relation to water based activities. There are a broad range of ecological assets within the region as highlighted on map 2. Although these assets provide a significant opportunity for tourism, adverse impacts can occur due to high levels of visitor use. Seasonal conditions, especially the prolonged drought currently being experienced is already having an impact on the ecological assets of the region. These conditions combined with ongoing climate change are likely to have a longer term impact.

## River Murray

The pattern of flow in the River has been altered significantly by regulation of flow and development within the catchment. This in turn continues to threaten the biological health of the River and its wetlands. Prolonged drought is currently exacerbating these problems, as water levels have declined significantly. Reduced flows have also had a significant impact on the Coorong and Lower Lakes area, which has special ecological character and needs careful management to ensure these values are maintained. Placement of a weir at Wellington will exacerbate these problems.

Although many wetlands and parts of the Lower Lakes are drying there is currently adequate water in the River Murray for water activities and houseboating. This is supported by the November 2008 Murray System Drought Update which states that “the Murray River remains a large water body offering diverse recreational opportunities” and no significant change is anticipated during the summer months. The environmental impacts of low flows have been widely publicised in the media and potential visitors have been deterred from visiting the River Murray due to the perception that there is no water.

Due to the heavy reliance of the Murraylands tourism industry on the River Murray maintenance of water flows is crucial. As highlighted in the economic section a decline in the tourism industry will have a significant economic impact on the region. Improved environmental flows will improve water quality and river height resulting in improved access for boating, water activities and wetland experiences. Visitor safety will also be improved with safety becoming a greater issue as water levels decline and expose hazards.

## Flora and fauna

The River Murray is ecologically unique including species ranging from the Murray Cod to the River Red Gum. The Mallee is distinguished by a unique collection of plants and wildlife including the rare western whipbird, redlored whistler, mallee fowl, western grey kangaroo, short-beaked echidna, pygmy possums and eighteen species of reptiles which inhabit these areas. Ridge-fruited and red-tipped slender leaf mallee add colour to vegetation in Billiatt Conservation Park. Mallee trees, native pines and wattles grow along road-sides, in remnant stands in farmlands such as Ettrick and Monarto and through the Conservation Parks across the Mallee.

The collections of plants and wildlife unique to the region are untapped resources which can attract a special interest tourist market. Particular interest groups, such as bird watching groups, are attracted to the Murraylands region for Mallee birds, migratory species and threatened plant and animal species.

The Mallee is significant for a number of Mallee-dependent or Mallee-specific species of mammals and birds. There are also a number of bird species that are endemic to the Mallee across southern Australia. Mallee also provides habitat for orchids and a variety of invertebrates, amphibians, cryptogams and vascular plants. The Mallee is known to contain a significant proportion of threatened beetles.

## Climate change

A recent CSIRO report<sup>4</sup> has highlighted that if the recent (1997 to 2006) climate were to continue, average surface water availability for the Murray region would fall by 30 percent, and end of system flows at the barrages would fall by 50 percent. In a less severe climate scenario flows are still predicted to fall. Therefore lower water levels may become the norm in the Murraylands, which will have an impact on River flows and wetlands, causing salinity, erosion problems and loss of biodiversity. Ongoing lower annual rainfall and changes in rainfall patterns may also impact on the flora and fauna, including birds, within the river and dryland areas.

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<sup>4</sup> *Water Availability in the Murray* fact sheet (CSIRO, 2008)

To reduce the impacts of climate change on a broad scale, greenhouse gas emissions from tourism activities will need to be addressed which is likely to increase development and operating costs. Tourism businesses will need to adapt to an emissions trading scheme which will increase costs but provides opportunities for promotion and branding to attract consumers seeking a 'greener' product. Further research and monitoring is required to determine the impacts of climate change on the environment and the Murraylands tourism industry.

## **Tourism impacts**

Many Murraylands tourism experiences are linked to the environment so management of these experiences is important to retain the value of the assets. When the level of visitor use is greater than the ability of the environment to cope with this use within acceptable limits, negative impacts can occur.

Loss of vegetation and prevention of vegetation regeneration can occur through unrestricted camping and walking through unfenced areas on the floodplain. The wash from boats can have an adverse effect on river edge nesting species and increase erosion. Vegetation destruction and erosion can occur through unrestricted mooring of boats and campfires can result in a loss of timber, fauna habitat and groundcover. River tourism activities can also create faecal pollution; rubbish dumping (contributing to decline in water quality) and noise disturbance.

Within the River and Mallee environments a proliferation of tracks for off road vehicle use can create soil compaction, soil erosion and destruction of native vegetation and fauna habitat. Tourism activities can also distribute weed seeds and have negative impacts on biodiversity due to degradation of habitat. Therefore it is important that in key biodiversity areas, recreational activities are managed in an ecologically sustainable manner including education to reduce impacts.

## **Sustainable tourism**

A sustainable tourism approach and well managed tourism has the potential to create beneficial effects by contributing to environmental understanding, protection, conservation management and monitoring. Therefore best practice environmental business and infrastructure models need to be encouraged. The Design Guidelines for Sustainable Tourism Development developed by the South Australian Tourism Commission is a key document which will assist developers understand how to respond to the key issues involved in the design of sustainable tourism developments.

Tourism development in the Murraylands can utilise the unique aspects of the River and Mallee environments and maximise positive impacts to the environment e.g. conservation of valued assets. Income generated from tourism in environmentally sensitive areas could contribute to the conservation or restoration of heritage and ecological assets.

## **Houseboat mooring**

A discussion draft of the Houseboat, Mooring and Marina Strategy and Guidelines for the River Murray in South Australia has recently been released. The intent of the strategy is to improve the ecological health of the River Murray and facilitate a more sustainable houseboat tourism industry by ensuring the River's character and natural environment is retained. In aiming to protect the health of the river the strategy necessitates that houseboats, mooring activity and marinas have either a neutral or beneficial effect on river health. It proposes an improved system for temporary mooring of boats which could impact on the spontaneity of the houseboat experience. A network of formal temporary moorings is proposed but the strategy does not define how this will occur e.g. clustered, secluded or both. Although this strategy may be effective in areas with large numbers of houseboats it may ultimately be more beneficial to use education strategies to ensure houseboat activity does not have a negative impact on water quality and the wider environment.

## **Managing tourism impact**

Some options for managing tourism impact include education of visitors and interpretative signage, designated camping sites with a permit system, rehabilitation and on-ground works at highly visited sites (e.g. provision of sanitation facilities), minimising motor vehicle disturbance. A summary of the potential tourism impacts to the Murraylands environment and how these can be managed are summarised in appendix 7 and further information on minimising impacts on the environment are provided in appendix 8.

# Development Planning

## Key Points

- The zones and policy areas in some Development Plans is confusing for prospective tourism investors and the assessment of development applications for many tourism related developments is both difficult and open to interpretation.
- A whole-of-government approach to policy reform for the realisation of the tourism vision is being addressed through the Better Development Planning project.

The Planning Strategy for Regional South Australia recognises the importance of a healthy River Murray to the economic, social and cultural prosperity of the communities along the length of the River.

The Planning Strategy for Regional South Australia includes strategies which encourage the protection and restoration of key habitat features in the river, riparian zone, floodplain and estuary to enhance ecological processes. It is suggested that tourism facilities and attractions be planned based on the area's natural features and character and ensure development does not change the natural dynamics of these areas. Also highlighted is the opportunity to improve the interface with the river through the upgrading and development of riverside infrastructure and amenities.

## Planning zones

Murraylands Council planning zones are shown in maps 3 to 7. River Murray Zones and Conservation Zones currently restrict development in some areas. Within the River Murray Flood Zone (to 1956 floodwater level) the natural environment should be maintained and protected and no new residential or other types of building should be encouraged. Within the River Murray Fringe Zone (above the flood zone) it is desirable that the land be retained in its natural condition as a backdrop to the River Murray, and that any development recognises the zone's scenic importance.

Conservation Zones include land of high environmental, ecological, scenic and cultural importance with limited and focused areas available for public access. This zone applies to some of the region's National and Conservation Parks.

Several Council Development Plans contain other zones and policy areas that affect the nature and location of tourism related development. Development and public access is also restricted on some DEH crown land with a 50 metre waterfront strip retained along the River Murray wherever possible.

## Planning policy issues

The main planning policy issues derive from the different approaches of the main agencies, the 'proactive' stance of SATC and the largely 'reactive' approach of the statutory Development Plan.

The proliferation of zones and policy areas in some Development Plans is confusing to local residents and prospective investors and are difficult to ground truth. The assessment of development applications for bed and breakfast accommodation, nature-based developments, theme parks, camping grounds, caravan parks and other 'legitimate' tourism related developments, is both difficult and open to interpretation.

Tourism could benefit from a whole-of-government approach to policy reform for the realisation of the tourism vision, which is being addressed through the Better Development Planning project.

## New planning policies

The Murray and Mallee Regional Land Use Framework will guide future land use and development in the Murraylands and Riverland regions. Expected to be completed in early 2009, the maps, policies and strategies contained in the Framework will provide statutory direction for Councils to prepare changes to their local area Development Plans and Strategic Direction Reports.

Once the Framework has been released, affected Councils are expected to conduct reviews of their Development Plans to incorporate the provisions of the Framework, and present new Development Plans in the format prescribed under the Better Development Plans (BDP) project. At the heart of the BDP project is a set of Development Plan policies, referred to as the Planning Policy Library, that deal with issues common to most Councils. In Version 4 of the Planning Policy Library, released in December 2008, the section on tourism development has been substantially revised. The changes which will impact on Development Plans in the Murraylands are:

- Amending tourism development policy in Primary Production Zones and Coastal Conservation Zones to enable small scale tourism visitor facilities and nature-based tourist accommodation to be developed in those zones.
- Adding policies protecting tourism developments from interface issues with horticultural and farming practices (spraying, night-time harvesting, etc.) by establishing buffer zones.

Updating Development Plans in response to the Better Development Planning project and Murray and Mallee Regional Land Use Framework will be a key step in removing the obstacles to tourism planning and will provide more consistency across the region.

# Initiatives to address the challenges

## The Murraylands – Building on existing strengths



# The Future

## Vision

The Murraylands Integrated Strategic Regional Tourism Plan (MIRSTP) supports a vision for the Murraylands tourism industry that is:

### **The Murraylands is Australia's most recognised nature based destination.**

- In 2020 a sustainable, operator and community led, tourism industry contributes 20% of gross regional product to the Murraylands economy.
- The Murraylands has high appeal to consumers, being recognised as a relaxing, fun, dynamic holiday destination.
- Consumers are attracted to the highest quality river and off river accommodation, integrated with a range of authentic and energising experiences.
- Collaboration within the industry contributes to consistency in new high quality product and service leading to increased profits for operators.

## Growth targets

The identification of the impact of the four growth scenarios has assisted in the shaping the development of the regional targets that are contained within the MIRSTP. The MIRSTP will be structured in two parts. The first part, the period 2009 -2010 must address the likely contraction of the economy and support the industry to fundamentally adapt its product offering to meet changing customer demands and increase yield to ensure its ongoing sustainability and viability.

The second phase, the period 2011 -2013, the MIRSTP must move to a broader and more strategic plane. During this phase, the predominate effort and focus will be the maturation of the industry sector, such that it is able to compete internationally, expand complimentary product offerings and dramatically increase yield. The key focus during this phase will be the attraction and realisation of new facilities and infrastructure.

### **Target 2009 and 2010**

**Maintain the Murraylands regional tourism industry with an annual growth rate of 1.5%.**

In 2006/2007, the Murraylands tourism industry contributed \$122m, or 6.2% of the total Murraylands gross regional product. The sector also provided 1,117 jobs or around 7.0% of total regional employment.

In 2008, the MIRSTP recognises that locally, there is evidence of retraction in employment and tourism expenditure. And while, the MIRSTP is not able to quantify these losses, there has been much anecdotal evidence supplied by tourism operators during consultation.

However, it is also important to compare the anecdotal losses with predicted jobs growth, evidenced by *the Murraylands Jobs and Investment Forecast 2009 -2011* that identified (based on local employer predictions) the creation of 162 new jobs (over three years) in the hospitality industry sector.

To this end, given the uncertainty within the region, the MIRSTP is promoting a targeted annual growth rate of 1.5%. Achievement of this target will provide no further new employment and will maintain the current share of gross regional product. That is, in simple terms, an annual growth rate of 1.5% is required simply to maintain the current industry status as it is challenged with rising costs and potentially increasing productivity (more work with less staff). Simply put, during the first two years of implementation, the MIRSTP aims to maintain the current industry status.

### **Target 2011-2013**

#### **Grow the Murraylands regional tourism industry with an annual growth rate of 4.5%**

The MIRSTP provides a framework for fundamental industry re-direction and growth during the calendar years 2009-2010. It is anticipated that the strategies outlined in the MIRSTP will enable the region to maintain the current industry status. However, as the MIRSTP and the region matures and adapts to changing competitive environments, it is anticipated that higher levels of annual growth will be witnessed.

During the 2011-2013 period, it is anticipated that the Murraylands region will observe significant construction, retail and land development growth as many major projects are realised. As projects like the Mobilong Secure Precinct, Racing Precinct (Housing and Track Development), South Terrace Retail Precinct, Mannum Waters and the expansion of the Monarto Zoological Park are implemented, demand for retail, hospitality and accommodation will rise sharply. Ongoing demand in the retail, hospitality and accommodation sectors is also anticipated as population increases are also likely to stimulate increased demand from visiting friends and relatives. During the period 2011-2013 it is also anticipated that many of the initiatives and strategies outlined in the *Ngarrindjeri Vision for Country Cultural Tourism Plan* will be implemented and therefore will also contribute to increased visitor yield.

To this end, the MIRSTP is forecasting annual growth of 4.5% during the calendar years 2011-2013. Annual growth of 4.5% will realise an increase (on 2007/2008 estimates) of around 30 new jobs and \$3m tourism industry expenditure (per annum).

## Governance and leadership

*Any form of healthy tourism begins at the grassroots level with successful and vibrant regional communities. The regions of highest demand in the future will be those who successfully develop a tourism vision showcasing distinctive aspects of their community. Careful planning, collaboration and communication will ensure the vision communicated to consumers is one of a 'must see' region and to investors as 'must invest' one.*

(Paraphrased from *Through the Looking Glass: The future of domestic tourism in Australia*, Tourism Research Australia, 2008)

### ***Growing Opportunity***

There is an opportunity to build on the existing strengths within the Murraylands industry through greater collaboration and partnerships to overcome industry fragmentation.

### **Industry and the role of local government**

There is general consensus that the tourism industry needs both government and industry leadership for growth.

At a local level, the development of the MIRSTP has been facilitated by local government in partnership with key business groups. Given the nature and structure of the local industry it is imperative that local government and the key facilitation partners retain a very important coordination role of the MIRSTP as it moves to implementation.

However, central to the success of the MIRSTP, will be the ability of local government and its facilitation partners to actively engage industry, operators and the community alike in the implementation of the plan.

The report *Achieving sustainable local tourism management* (Sustainable Tourism CRC, 2006) clearly identified that rigid, prescriptive tourism planning and management solutions are no longer appropriate. Local government tourism management involves the development of a living strategy, one which is capable of adapting to changing conditions, local needs and events.

The report also clearly identified that tourism is one emerging area of policy that does not fit well within traditional council structures. Managing visitor information centres requires partnerships, funding marketing efforts is a local economic development issue, managing the impacts of visitors is a social or community planning issue, and addressing development and land use conflicts are planning issues. Flexibility is needed for aspects of tourism to be managed differently.

## **Intervention vs strategic facilitation**

The delivery of the MIRSTP is challenged in that the tourism industry is fragmented and lacks cohesion. Local government responsibilities are expanding, or are at times, in conflict with tourism development.

However, the MIRSTP has clearly identified a range of industry, economic, environmental and social development opportunities that can be realised if collaborative partnerships can be developed. Given the relative infancy of, and current stress faced by, the local tourism industry it is recommended that the MIRSTP is delivered in two stages. The first stage must be delivered via a direct hands on approach, with local government and other key partners playing a strong facilitation and leadership role. In the second stage, local government and its key partners can take a more strategic facilitation role and one that devolves leadership to industry.

## **Business cohesion and collaboration**

As discussed previously, within the Murraylands, there are a number of existing groups that aim to facilitate improved tourism outcomes. Facilitating, marshalling and coordinating the support of these business groups must be a key strategy of the MIRSTP to ensure that the plan is owned and implemented by the broader community. Local government and its key facilitation partners must play a facilitation role and encourage business and industry to actively implement the plan.

During the community and industry consultation phase of the MIRSTP, it was noted that, generally, business groups within the region were committed to the principles of 'working together' to improve the performance of the tourism industry sector. However, there was also evidence that business groups lacked the necessary cross regional cohesion and support to affect the strong and lasting change necessary to transform industry performance. Therefore there is an opportunity for the MIRSTP to review and coordinate opportunities for collaboration and support for the MIRSTP.

## ***Moving Forward***

Implementation of the plan will require the Murraylands tourism industry to work together, recognising the benefits achievable for the whole region.

### **Independence**

The diversity of challenges for local government are significant. Local government has a broadening economic, social and community agenda in addition to its traditional infrastructure services. Local government in the Murraylands is characterised by smaller, rural based, councils that struggle to attract staff with broad skill sets. In particular, local government in the region would find it difficult to attract staff with sufficient management skills that include industry and business development experience.

Therefore, it is appropriate that the Murraylands Regional Development Board be tasked to coordinate the implementation of the MIRSTP on behalf of local government and the other key facilitation partners.

The Murraylands Regional Development Board is an independent, incorporated association, with extensive industry facilitation and business development skills. Their leadership role in the MIRSTP process will ensure that active industry engagement of the MIRSTP is possible.

### **Roles and Responsibilities**

The implementation of the MIRSTP will require a range of participants, with diverse skills, to support the development of a range of key result areas. The key result areas as detailed in the MIRSTP strategies are:

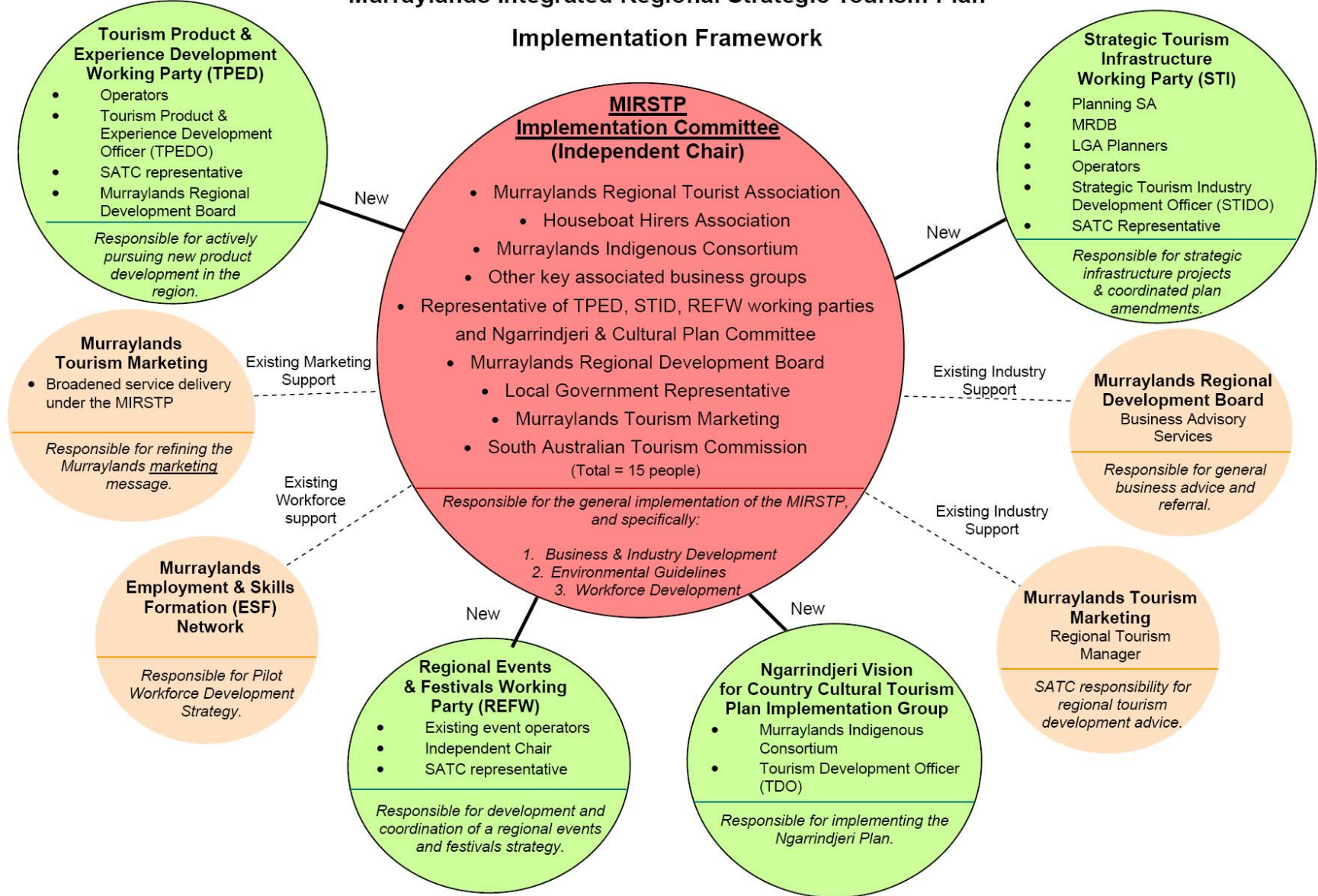
- Business and Industry Development
- Product and Experience Development
- Infrastructure Development
- Brand and Marketing Development
- Environment and Planning Advocacy

It will be necessary to assign clear roles and responsibilities within the above key result areas to ensure that the MIRSTP is implemented. An Implementation Framework detailing the strategic responsibilities for implementation has been developed and it is provided on the following page.

### **Goal 1**

Implementation of the MIRSTP is achieved via genuine, cross sectoral and active regional participation.

# Murraylands Integrated Regional Strategic Tourism Plan Implementation Framework



# Business and Industry Development

## *Growing Opportunity*

The Murraylands tourism industry has an opportunity to respond to a range of changing consumer needs and behaviours, leading to industry growth.

Business development provides an opportunity to overcome issues relating to low profitability.

As the Murraylands tourism industry is not currently well supported with coordinated access to training there is an opportunity to design and deliver training suitable for busy operators and volunteers.

## **Responding to Consumer Trends**

### **New technologies/online**

At present, few operators have the ability for their customers to directly make online bookings. Houseboat operators who are members of the Houseboat Hirers Association (HAA) are able to provide an online booking system through the HAA website which supports 120 operators in the Murraylands and Riverland regions.

Consumers will expect the online messages to be functional, compelling and easy. The use of maps, pictures and symbols to convey complex information will be important short cuts.

### **Rhythm and Balance**

Work, family and time constraints now limit the number of holidays that consumers will take and the South Australian Tourism Plan 2009-2014 clearly identifies that consumers have an aspiration to slow down.

Consumers are seeking opportunities for peace to restore mental and physical health that provides them with connection and continuity. Experiences that provide consumers with choice and 'grounded connectivity' through slow food, nurturing of relationships and living in balance with the rhythms of the natural world will meet holiday and short escape needs. The experience will be enriched by informing people through 'education' and story telling. The Murraylands has the key attributes to be able to develop experiences that meet these needs.

### **Rising education, wealth and expectations**

Changing annual leave patterns, shorter breaks, increased stress and changing family structures mean that consumers generally are more demanding and discerning tourists. This will mean that the tourism industry will need to provide better and more innovative products; with delivery from people with better skills at servicing the customer

The SA Tourism Plan 2009-2014 targets higher yield travellers. It is recognised that this high yield market segment (Experience Seekers) seek quality but not pretentiousness and want active, immersive holiday experiences.

### **Demand for experiences**

Tourism Research Australia clearly identified in its report, *The future of domestic tourism in Australia* (2008) that consumers, across the age range are now demanding experiences that offer 'value'. And while the definition of value is different for everyone, it means that the industry will need to develop packages and experiences that provide lasting and intrinsic emotional value.

The report also identifies that although cultural and heritage activity participation increases with age, participation in these activities by younger generations has also increased.

To this end, a diversity of experiences must be developed and promoted. Many opportunities for the Murraylands exist with value adding to existing products, experiential tourism, learning holidays, eco-tourism, and adventure tourism being identified.

### **50+ market**

The 50+ consumer presents a strong opportunity for the Murraylands. They are an existing target market and Roy Morgan Research, 2008, clearly identified that this group is a growing market and it accounts for more than 40% of all domestic tourists and on average has the highest expenditure, dispelling the myth that they are a low yielding consumer. And while, the 50+ group is generally a less active consumer, they are much different than this cohort in the past. This market has the potential to significantly drive domestic tourism, but they must be understood as a much more discerning consumer.

### **Young people**

Young people are also an existing, and growing, Murraylands target market. Tourism Research Australia clearly identifies that Generation Z expects to stay in cheaper accommodation in the short term with friends or relatives, caravan or camping. Generation Y also share nights with friends or relatives, but this will decline over time as their relative income increases. Generation X has begun the process of shifting towards more expensive accommodation.

As a collective group of consumers, their accommodation needs can be supported by the Murraylands region, but their experiential needs must also be developed.

### **Domestic vs International tourism**

Domestic tourism over the past decade has experienced stagnant to limited growth. And, a key challenge for domestic tourism has been the fact that the relative cost of international holidays has not grown in line with other goods and services and to date, international tourism remains relatively affordable.

International tourism remains highly aspirational across all market segments, however the changing global economic status may provide stronger growth opportunities for the domestic market. The Murraylands must promote its relative affordability and ease of access to consumers.

## **Business development**

Community and operator consultation during the MIRSTP development process clearly identified that operators and volunteers alike required external business development support. It was identified that in a contracting economy that operators were more likely to reduce both staff and expenditure. These decisions invariably will lead to the already stretched operator limiting the amount of time available for business development, review and re-engineering activities.

SATC proposes to support the building of a strong industry body to take responsibility for industry development. Murraylands operators are encouraged to participate in this process and to utilise opportunities that are provided.

## **Accreditation**

An Accredited Tourism Business (National Tourism Accreditation Program) provides assurance of quality, professionalism, reliability, environmental practices, accuracy in advertising and adherence to a code of ethics. Accreditation values and acknowledges professional, quality and reliable management of tourism businesses.

Eco-accreditation can also provide opportunities for tourism businesses that enhance, protect and/or conserve the natural environment. These programs are summarised in appendix 8.

Star-rating is concerned with 'physical' standards of the business and facilities provided. STAR ratings have grown to become the recognised world wide guide to accommodation quality and provide consumers with assurance as to the quality of a property. The Australian STAR Rating Scheme has been developed by AAA Tourism (AAAT). Due to the range of tourism accommodation there are ten different categories to suit the needs of the specific sectors. There are over 300 criteria (including accreditation) used to assess a property and determine its rating between one and five stars.

## **Online education**

Increased use of technology provides strong and extended direct marketing opportunities for operators within the region. Information and communication technologies increase efficiencies but they also require tourism businesses to stay up to date with new technologies to benefit from the consumer's increasing use of the internet.

## **Mentoring**

Community and operator consultation during the MIRSTP development process clearly identified the need for mentoring for existing and emerging tourism businesses. Tourism locally not only competes with intra and interstate markets but also international markets which means that operators must be agile and adaptable and be able to respond to changing consumer needs.

## **Workforce development**

The Murraylands tourism workforce is a diverse and complex sector that is characterised by highly casualised and multidisciplinary workforce. During MIRSTP community and industry consultation process it became evident that there were a range of local workforce development issues. These issues are not unique to the Murraylands, but they do provide a clear summary of the challenges faced by the local industry sector.

## **Availability of Training**

There is currently a range of levels of expertise required to support the Murraylands tourism industry. A summary of these levels and the degrees of overlap which currently occurs is shown in the Murraylands Tourism Industry skills and qualifications provided in appendix 5.

The tourism industry within the Murraylands is not well supported with coordinated access to training. Improved training opportunities to suit busy operators are required. The *SA Tourism Plan 2009-2014* proposes to address this issue with a strategy to “build a single, strong body that takes responsibility for industry development, leading operators to a sustainable tourism future”.

Professional training is provided at degree level by tertiary institutions which are primarily located in Adelaide.

Vocational training has been available through TAFE SA Institutions at Murray Bridge and Mount Barker providing business management, administration, customer service and tourism training courses. These are provided on a demand basis and generally follow a fixed schedule of delivery.

Operators should also be encouraged to attend training which will encourage improvements to business performance through product development and/or value adding. For example, storytelling and interpretation which is offered by Flinders University and is an initiative which is included in the SA Tourism Plan.

In house training is the preferred method for many small organisations which have limited time to attend outside training courses. Targeted training (up to three hour evening sessions) in OH&S, business planning, marketing, succession planning is facilitated by the Business Advisor at the Murraylands Regional Development Board. A broad skill program specifically developed for the tourism industry was successfully delivered and well attended in 2006.

Volunteer training is also provided in-house for tour guides, information delivery, visitor assistance, site and program development by Monarto Zoo and at the Murray Bridge Volunteer Information Centre supported by the Rural City of Murray Bridge staff development programs

## ***Moving Forward***

Moving forward requires responding to consumer trends including understanding and actively participating in the use of new web technologies.

Business development will assist operators to move forward and needs to include opportunities which encourage youth to be involved in the tourism industry.

A pilot Workforce Development strategy will clearly articulate the future skilling and employment needs of the Murraylands tourism industry.

## **Consumer trends**

Tourism operators must maintain their awareness of changes in consumer trends to be able to effectively market and refine their product. With an increased use of the internet by consumers for holiday decision making it is important to gain an understanding of how the internet is utilised. An appealing website is becoming a critical marketing tool for a tourism business.

The new generation of web technology being used by many consumers is Web 2.0. These user-generated content websites can be used by consumers and businesses to communicate with other web users. They are commonly used for online bookings and can influence travel decisions through a range of tools including; blogging, RSS, widgets, social networking, forums, SMS, video, podcasting, online sales, YouTube, Facebook, MySpace, chat rooms and search engines (e.g. Google).

Tourism operators can use these Web 2.0 tools to initiate or participate in forums and promote their business through online networks, podcasting and online videos. Consumers can also use these tools to provide feedback about destinations, experiences and businesses and can influence the decisions of other consumers. Therefore it is important for operators to gain an understanding of how these tools can influence their marketing.

## **Business development**

It was clear from the consultation process that fundamental business and product development support was required. In particular, operators identified the need for support in areas like customer and market research, business planning, customer service and marketing. To attract new energy to the industry support and encouragement needs to be provided to youth.

Given the operating environment (ongoing water restrictions and drought), it was suggested that a direct hands on approach be cultivated so that operators could access professional, but locally delivered, support.

## **Murraylands Workforce Development**

The Food, Tourism & Hospitality Skills Advisory Council released a *Tourism Industry Workforce Development Strategy in 2007*. This plan has not yet been resourced, but it clearly identifies the skilling needs of the South Australian Tourism industry through to 2012.

It is clear that for the Murraylands tourism industry sector to grow, that it also will need an increasingly skilled and flexible workforce. The development of the MIRSTP will provide the industry with clear directions for growth, however during its implementation, it is clear that much more work needs to be done in profiling the future skilling needs of the region to support that growth.

Murraylands tourism industry will need to clearly articulate its future skilling and employment needs. In particular, it will need to work across all sectors of the industry, in partnership with the Food, Tourism & Hospitality Industry Skills Advisory Council and the Murraylands Employment and Skills Formation Network.

It will be important for a Murraylands Tourism Workforce Development Strategy to integrate with the Tourism Industry Workforce Development Strategy 2007-2012 which was endorsed by the Tourism Minister's Round Table in 2007.

### **Goal 2**

**A self reliant tourism industry that has access to relevant and practical business and industry support.**

# Product and experience development

## *Growing Opportunity*

Building the tourism appeal of the Murraylands will require new investment to take advantage of opportunities to continually provide “New News”.

Operators will require support to develop new product and experiences, including identifying opportunities for collaboration.

To expand the opportunities provided by regional events a coordinated strategy needs to be developed.

The tourism industry requires development opportunities that provide memorable, unique experiences accompanied by social activities. A diversity of experiences which exceed expectations is required. New experiences need to be fresh, relevant, competitive, aspiring and inspirational and provide opportunities to be active and immersive. New investment is required by existing and new operators to ensure the Murraylands always has “New News” to build appeal within the market.

The appeal of the Murraylands and recognition of the Brand needs to be increased to attract both domestic and international visitors. To attract the interstate Experience Seekers and international visitors appealing experiences need to be continually developed and effectively communicated.

It has been highlighted that a demand is anticipated for ‘Grounded connectivity’ experiences which include living in balance with the rhythms of the natural world including stimulation, challenge and inspiration. Experiences must provide value for money by adding value, creating links and contributing to ‘self discovery’.

The River Murray is a key strength of the Murraylands and needs to be the focus of most development opportunities. The Murray Mallee will be able to leverage off the increased visitor numbers to the River by providing product which will attract these visitors.

New products can transform the prospects of places e.g. the Beechworth Bakery emerged from a great idea and business concept and has become a significant contributor to tourism and regional development in north east Victoria. A case study about Beechworth prepared by Tourism Victoria is included as appendix 6. This case study highlights some interesting similarities with the Murraylands region.

## Houseboat and Cruise boats

Houseboats and cruise boats are already a key strength of the Murraylands. However it is recognised that there is an opportunity to further build the recognition of this sector. This includes strengthening the links to the ecological assets of the region and to attractions in the Murray Mallee. New investment for the development of new product is an important component of the ongoing development and expansion of the sector. For example the feasibility of exploring the product demand for two person houseboats has been suggested.

## Collaboration

Many development opportunities can be provided through clustering or collaboration and networking. For example the Monarto Zoo attracts many visitors to the region and through collaboration a package to encourage visitors to also experience river activities may be developed. Value can be added to existing product by including free tourism assets in experience packages e.g. river reserves, playgrounds, wetland boardwalks. Developing and improving regional assets for local enjoyment can also add value to tourism product e.g. playgrounds and sporting facilities. Therefore it is important that Local Government provides the support required to maintain and upgrade these assets. Sports, recreation and water-based activities can be expanded from existing assets and activities. Visitor Information Centres can have a key role in promoting the results of collaboration.

## Value adding

Potential exists to value add at established tourism locations and link across the region on theme based trails. Existing assets such as museums have the potential to expand into a significant Mallee and River history trail highlighting the determination and ingenuity of pioneers by profiling the history of townships and agricultural heritage. Linking and expanding existing sites/facilities with supporting information maps, focusing on tourist interests, offers opportunities to highlight and develop collaborative strategies and complementary infrastructure e.g. bicycle trails in regional towns, eco-tourist trails along River Murray and Coorong, and indigenous cultural heritage trails. Links can be created between existing trails (e.g. walking, cycling, driving, canoeing) and new trails created to strengthen links.

The most significant industry within the Murraylands is agriculture which is supported by a strong food processing industry. Therefore opportunities exist to develop niche markets in food e.g. meat, olives, herbs, capers, pate, potatoes, onions, and other local produce.

Musical and cultural activity continues to expand and provides a value adding opportunity e.g. Murray Bridge "SA 2010 Regional Centre of Culture" activities. It is important to leverage these opportunities to connect the activities to other tourism activities and develop packages to encourage longer stays in the region.

The strength and clarity of the night skies, within close proximity to Adelaide is an underutilised asset which could be used to develop astronomy based activities. This could be a targeted opportunity with links developed to universities, astronomy and astrology clubs.

Value adding to the tourism experience can be provided through storytelling, which helps to provide association with the region. Stories highlight the unique experience and provide an identity for the region.

## **Regional Centre**

As the regional centre, Murray Bridge can be positioned as an outstanding River destination by creating a regional River Park which is linked to the central town area. This link could incorporate connections with heritage and aboriginal cultural tourism opportunities e.g. Pomberuk and Hume Reserve. The *Murray Bridge Urban Growth Plan* and *Riverfront Reserve Management Strategy* will be able to guide these developments.

An upgrade of tourism product and infrastructure in Murray Bridge, combined with marketing is an opportunity to attract more visitors to the region and improve the perception of the town for potential residents.

A conceptual map of the potential to integrate the Murray Bridge Town Centre, the River Murray and tourism development opportunities is provided at map 9.

## **Young people**

It is important to continue to encourage young groups to visit the region by providing activities and events which appeal to them. Opportunities for water skiing and wakeboarding need to be retained and could be further developed. Motor sports are also appealing and events such as the pedal prix and Autofest already attract large numbers of visitors. Product packaging and marketing could increase visitor stays and spend during these events or encourage repeat visits to the region. Controlled off-road vehicle tracks within Conservation Parks e.g. Ngarkat, Billiat, Brookfield to Marne or tracks in disused quarries or private property could continue to be developed

A quad bike park located near Murray Bridge offers an off road experience through Mallee scrub for motorcycle enthusiasts. Bikes are supplied to clients and tracks have been established to suit bike riders at all levels of experience. Value adding to this experience includes the provision of picnic areas and tours of the native vegetation which includes wild orchids. This tourism development is an example of how the basic natural assets of the Murraylands can be used to develop a business which is appealing to young people, families and corporate groups. The business is also providing employment for young people, encouraging their involvement in the tourism industry.

## Events

Events have the potential to expand into a major feature of regional tourism. New events could also stimulate tourism growth e.g. a major event focused on the River Murray would help to negate the perception that there is no water in the river. Carefully planned and supported events marketed on an annual collaborative calendar can showcase the diversity and qualities of the Murraylands people. Events help to build brand strength and provide an excuse to engage with the community.

A major event focussed on the River Murray could be used to improve the appeal of the Murraylands and highlight the current suitability of the river for recreational opportunities. This could be a collaborative event extending beyond the Murraylands and encouraging participation from both tourists and locals. For example it could include a flotilla of boats travelling along the River and support events at river towns. To maximise impact and visitation a feature event could also be held.

There may also be opportunities to leverage off other popular events in the State. For example the success of the Tour Down Under could be utilised to develop a premium mid year cycling event from Adelaide to Murray Bridge or Mannum. Opportunities for increased engagement and exposure of the Pedal Prix also need to be investigated.

## Natural resources

A key strength of the Murraylands which is currently under utilised is the natural resources which provide opportunities to present and interpret the environment. These include ecological, archaeological, historical, cultural, spiritual and geographic features. These assets provide opportunities for the development of Geotourism. The River Murray, Coorong and Lower Lakes region has significant cultural, spiritual and heritage value. Wetlands provide interpretative opportunities through strategic placement of signage and boardwalks. Birdwatching experiences provide an opportunity to link the River Corridor and Mallee areas. An alternative view of these resources can be provided through flight experiences.

The Mallee is a significant area for a number of Mallee-dependent or Mallee-specific species of mammals, birds, reptiles, insects and flora. Conservation Parks in the region are key assets for nature based tourism and provide an opportunity for guided tours incorporating story telling about local history and culture. DEH and SATC are working together to develop leading nature-based experiences through planning and management, park infrastructure, marketing and communication. This partnership could be utilised to develop the region's conservation parks into high quality nature-based tourism experiences. For example Ngarkat Conservation Park offers strong prospects for a specialised low impact development and business opportunities for guided tours and luxury camping accommodation.

A conceptual map of the potential to link nature based and recreation tourism development opportunities is provided at map 10.

## Aboriginal cultural tourism

The *Ngarrindjeri Vision for Country Cultural Tourism Plan* (included as appendix 11) is presented in nine sections:

- Summary SATC Aboriginal Cultural Tourism Strategy – 2007-2010.
- Summary of the current status of the five regional sites.
- Review of potential for indigenous cultural tourism development.
- Summary of challenges currently faced by indigenous tourism operators.
- Outline of future directions for tourism development.
- Action Plan to implement indigenous cultural tourism objectives.
- Challenge and Response, Challenges and Opportunities.
- Ngarrindjeri Vision for Country Cultural Tourism Strategy.
- Ngarrindjeri Vision for Country Cultural Tourism Evaluation.

Similar to the broader Murraylands tourism industry, the Ngarrindjeri Plan also identifies that support will be required to develop the individual businesses due to the commitments of the key drivers, the Elders.

Workforce development is also identified as critical to the success of the Ngarrindjeri Plan, as it is to the broader Murraylands Plan. Fundamental skilling needs in business management, site management, tour guiding, marketing, product development and visitor information have been identified.

A conceptual map highlighting the potential for an Aboriginal Cultural Tourism Trail is provided at map 11.

### Key actions

The *Ngarrindjeri Vision for Country Cultural Tourism Plan* includes an Action Plan to support the implementation. The Action Plan details site development and expansion activities, program development, workforce development and business and product development activities.

A copy of the Ngarrindjeri Vision for Country Cultural Tourism Plan is appended to this report (appendix 11) and support for its implementation is included in the broader MIRSTP strategy.

## Educational tourism

Educational tourism is already a major focus for Ngarrindjeri cultural tourism and at Monarto Zoo and has the potential to be extended to the environment including increasing the understanding of issues and solutions being implemented.

Educational trails e.g. heritage trail can connect townships within the region and also connect to neighbouring regions. They provide an opportunity to bring people from another region into the Murraylands e.g. rail connections. Trails are a complementary product which

adds value to the Murraylands experience. Itineraries for a trail experience assist in increasing regional appeal by providing a mental map of the region. A conceptual map of the potential to link heritage and cultural product development opportunities is provided at map 12.

Day trips and four wheel drive adventure tours can provide an authentic experience for visitors. Well developed tours can link the natural assets of the region and local heritage through energising story telling. These tours and stories may also provide opportunities to encourage self-reflection and understanding.

## **Energy and connection**

There is an opportunity to explore the potential for maximising the natural and spiritual energy of the Murraylands by capitalising on the picturesque landscapes within the river and Mallee environment. Designing new developments to maximise the energy of a site will ensure consumers can feel refreshed and energised whether for a one day event or longer stay.

These developments can deepen nature based experiences by enabling visitors to have a deeper connection to a place and its people. Tourism product based on astronomy, aboriginal cultural heritage, history and heritage, festivals and events, arts and food experiences can all benefit from developing these energy connections.

## ***Moving Forward***

Product and experience development opportunities that will make the biggest difference to regional tourism need to be implemented as a high priority.

Support for the opportunities identified in the Ngarrindjeri Vision for Country Cultural Tourism Plan needs to be provided.

## **High priority development opportunities**

The MIRSTP consultation and research process has identified many product and experience development opportunities for the Murraylands. In earlier sections, it has been highlighted that consumers are seeking new and more immersive experiences. Given the short term volatility and external threats to Murraylands Tourism it is important that the region identifies a range of high priority development opportunities which will create a significant difference and facilitate increase yield for the region.

The potential development opportunities have been distilled into twenty core opportunities and assessed based upon their ease to implement and the anticipated consumer demand. Table 1, on page 72, summarises the assessment and table 2 identifies the high priorities.

The high priority product and experience development opportunities for the Murraylands are identified as:

- Development, refreshment and packaging of internationally/wholesale ready houseboating and cruise vessel products. (18).
- Development of a compelling regional trail experience/s, notably heritage, food and the linkage of existing trails. (2,4,5).
- Leveraging events from/on the “SA 2010 Regional Centre of Culture” activities in Murray Bridge. (12).
- 4WD adventure tours. (16).
- Astronomy experiences (8).

### **Aboriginal development opportunities**

Similarly, the *Ngarrindjeri Vision for Country Cultural Tourism Plan* (appendix 11) identifies the key opportunities for development, that are common to all five sites discussed in the plan and they are:

- Interpretive facilities.
- Camping/accommodation development.
- Day trips and tour development.
- Heritage trail development.

These opportunities integrate well with the development opportunities outlined in table 1 and 2.

### **Other development opportunities**

Other development opportunities, with potential, are also contained within tables 1 and 2. Other development opportunities with higher consumer demand, but with more difficulty in implementation include:

- Development of a compelling regional trail experience integrating aboriginal cultural heritage and eco-tourism. (3, 17).
- Integration of the Murray Bridge Town Centre, the River Murray and key tourism assets. (19).
- Development of niche food and quality dining (6).
- Development of off road vehicle tracks (11).

It is important to note that all of development opportunities have been assessed are within broad and generalised categories. Specific proposals will need to be developed and assessed for ease to implementation, anticipated consumer demand and return on investment before progressing with projects.

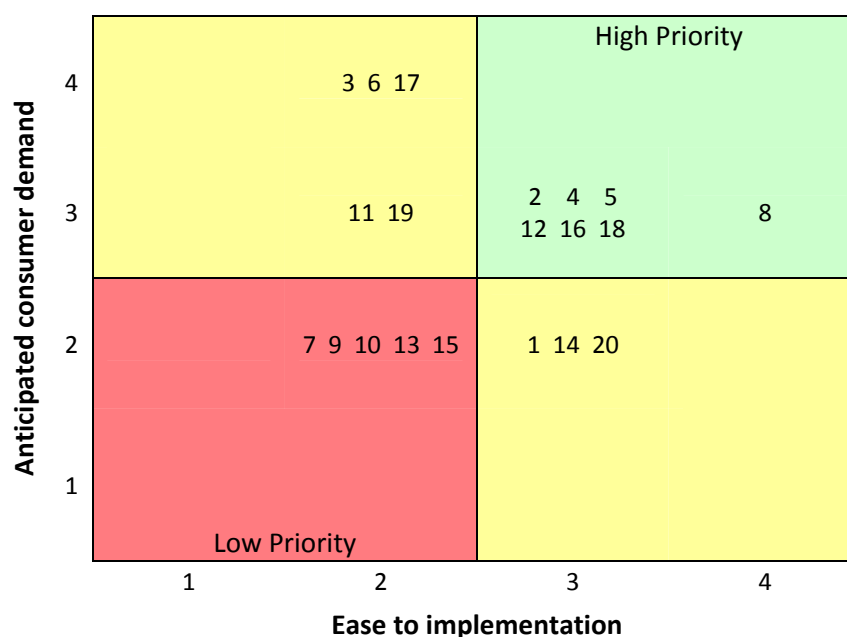
### **Goal 3**

A diverse range of new products are developed specifically to increase visitor yield, stay and experience.

Table 1: Assessment of the ease to implement and anticipated consumer demand of key development opportunities.

	<b>Development Opportunity</b>	<b>Ease to implementation</b> (1=very difficult, 2=difficult, 3=easy, 4=very easy)	<b>Anticipated consumer demand</b> (1=very low, 2=low, 3=good, 4=excellent)
1	Theme based regional trail – nature and recreation based	3	2
2	Theme based regional trail – heritage (rail, agribusiness and cultural)	3	3
3	Theme based regional trail – eco-tourist and/or Aboriginal	2	4
4	Theme based regional trail – food industry	3	3
5	Link existing trails (walking, cycling, driving, canoeing etc)	3	3
6	Niche food and quality dining	2	4
7	Music and cultural	2	2
8	Astronomy	4	3
9	Water skiing and wakeboarding	2	2
10	Flight experiences	2	2
11	Off-road vehicle tracks	2	3
12	Events, including 2010 celebrations	3	3
13	Geotourism interpretative stories	2	2
14	Birdwatching	3	2
15	Conservation Parks	2	2
16	4WD adventure tours (including day trips)	3	3
17	Aboriginal cultural heritage	2	4
18	Houseboats & cruise vessels (packaging & upgrades)	3	3
19	Murray Bridge – tourism integration with CBD	2	3
20	Spiritual tourism packaging	3	2

Table 2: Identification of high priority development opportunities (refer to the above table for the development opportunity each number relates to).



# Infrastructure development

## *Growing Opportunity*

New and existing tourism product and experiences will need to be supported by appropriate infrastructure.

There is an opportunity to improve information support for visitors to encourage longer stays within the region.

Tourism operators require appropriate infrastructure support to develop and market their product and business effectively.

As discussed in the previous section tourism growth in the Murraylands requires ongoing development of opportunities. These opportunities need to be supported by tourism infrastructure, including new infrastructure and better use of existing infrastructure. Some infrastructure will support the needs of both the community and visitors e.g. playgrounds and recreational areas.

## **Accommodation**

It has been highlighted that there are significant opportunities to improve accommodation standards within the Murraylands. Some operators are already taking action to address this issue but a unique quality experience could be provided through 4-star accommodation with water views and easy access to water. It is noted in the *Coorong District Council Tourism Marketing Strategy* that Coorong experiences could be linked to quality accommodation and infrastructure in Victor Harbor and Adelaide. There is an opportunity to support these visitors with quality accommodation in the Murraylands.

Accommodation, particularly high quality safari style, at the Monarto Zoo would add value to the zoo experience and could encourage visitors to travel further into the region. Nature based accommodation provides opportunities throughout the region. Cabin accommodation is gradually being developed and further opportunities may be available. There is potential for expansion of caravan park and motor-home facilities e.g. in Lameroo and Pinnaroo.

## **Conference Facilities**

High quality conference facilities are also lacking within the region and there is potential to incorporate these facilities within a 4-star accommodation development. Ideally conference facilities would be centrally located, with water views and good access to regional infrastructure and services.

## **Visitor Information Centres**

It has been highlighted that Visitor Information Centres (VICs) are important as a tourism resource and can assist visitors to make decisions when they come to the region. Level of visitor information both in content and method and style of delivery is seriously lacking in the Murraylands. A high quality, high profile Visitor Information and Regional Showcase Centre should act as a central point for visitors entering, leaving and moving around SA. With its strategic location, the Murraylands (especially Murray Bridge) is the ideal place for this Centre.

The SA Tourism Plan includes an action to “Create a strategic network of exemplar Visitor Information Centres which provide highly collaborative links to broader experiences”. Implementing this action will require a review and potential upgrade of existing information outlets to provide additional accredited VICs in the region. This will assist SA to ensure a strategically efficient network of centres is developed to maximise the benefit from resourcing and trained staff.

## **Visitor support**

Ongoing support is needed to ensure visitors are able to easily access key tourism sites through the upgrade of signage and implementation of the recommendations in the signage audit report prepared for the Murraylands Regional Development Board. Quality signage and maintenance of this signage throughout the region is important to help raise the appeal of the Murraylands. Signage provides information for visitors on products/attractions and directional guidance. GPS technology could also be utilised to highlight attractions within the region.

Signage and appropriate infrastructure support e.g. footpaths, will be required to ensure visitors can readily access cross regional trails.

## **River vessel support**

Houseboating and River Cruising are significant and unique strengths for the Murraylands and need to be adequately serviced. Requirements for marinas and moorings to service the houseboat industry will create further change within the industry. Support will be required for any changes necessary to ensure the houseboat experience remains an important part of the tourism industry.

Water levels in the River Murray have declined and large houseboats and cruise boats can not access the dry dock facility at Renmark for maintenance. This has highlighted the need for a dry dock facility in the Murraylands region.

## Operator support

Broadband access is required throughout the region to enable tourism operators to participate in online marketing and booking systems.

The use of new technologies needs to be explored for the generation of sustainable power, water and waste treatment. Services need to be provided to mobile home owners and houseboats, including grey water pump out. Provision of sanitation facilities is required at highly visited sites, especially within the river environment.

## *Moving Forward*

Infrastructure opportunities which will make the biggest difference to regional tourism need to be implemented as a high priority.

Ongoing infrastructure needs to support tourism will need to be prioritised.

The feasibility of a high quality, high profile Visitor Information and Regional Showcase Centre within the region needs to be determined.

## High priority infrastructure needs

The MIRSTP consultation and research process has identified a range of infrastructure needs. The identified infrastructure needs have been distilled into ten core opportunities and assessed based upon their return on capital investment and the anticipated consumer demand. Table 3, on page 77, provides the assessment and table 4 identifies the high priorities.

The high priority infrastructure needs which will create a significant difference in the growth of the Murraylands tourism industry have been identified as:

- 4 star accommodation with water views (1).
- Conference facilities with water views and regional integration (2).
- Accommodation development including Monarto, cabins, caravan and motor home facilities (3,4,5).
- Improved broadband access and signage upgrades (9,10).

## Other infrastructure needs

Other infrastructure needs, with potential, are also contained within tables 3 and 4. Another infrastructure need with high consumer demand, but lower return on measurable investment is:

- Development and improvement of the existing network of Visitor Information Centres. (7).

No less important, but more capital intensive and with lower degrees of consumer demand are:

- Establishment of the Murraylands Dry Dock (8)
- Upgrading of public facilities (roads, reserves and playgrounds). (6)

Again, it is important to note that all of the infrastructure needs have been assessed within broad and generalised categories. Specific proposals will need to be developed and assessed for ease to implementation, anticipated consumer demand and return on investment before progressing with projects.

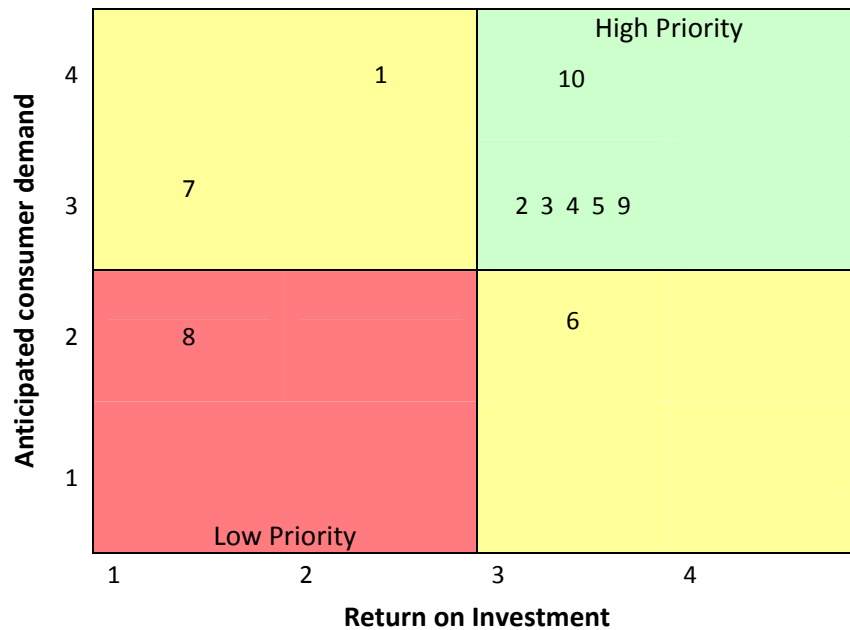
#### **Goal 4**

The Murraylands tourism industry sector is supported by quality infrastructure that meets the needs of both community and visitors.

Table 3: Assessment of the ease to implement and **potential** return on investment of key infrastructure needs.

	<b>Infrastructure</b>	<b>Return on Capital Investment ROI</b> (1= very low, 2= low, 3= good, 4= excellent)	<b>Anticipated consumer demand</b> (1=very low, 2=low, 3=good, 4=excellent)
1	4 star accommodation (water views and easy access to water)	2	4
2	Conference facilities	3	3
3	Monarto accommodation	3	3
4	Cabin accommodation	3	3
5	Caravan and motor home facilities	3	3
6	Upgrade public facilities (reserves, playgrounds etc)	3	2
7	Visitor Information Centres	1	3
8	Murraylands Dry Dock	1	2
9	Signage upgrade	3	3
10	Broadband internet access	3	4

Table 4: Identification of high priority infrastructure needs (refer to the previous table for the infrastructure needs each number relates to).





# Positioning and Branding

## *Growing Opportunity*

The Murraylands tourism brand has the lowest brand appeal in South Australia.

The Murraylands has an opportunity to build a more appealing destination for the consumer.

Marketing and branding efforts at a State, Regional and Local level have identifiable synergies that can be further developed to ensure that consumers receive a consistent message.

A regional brand is a focused business growth strategy to help distinguish one region from another. It communicates what you want the market to think, know or feel about your tourism region. The regional brand must be realistic, clearly distinguish the region and offer the visitor significant benefits.

The brand is central to tourism business growth strategies. The brand strategy will influence product development, marketing, planning and investment.

### **Current Brand Position**

Research indicates that the Murraylands has the lowest brand appeal in South Australia with few highly differentiating attributes. The region is closely associated with the River Murray and water based activities. It is also considered a low cost holiday destination.

### **Current Brand Promise**

The current Murraylands brand promises:

- Slow, tranquil river.
- The place to share childhood experiences with the new generation.
- The place to unwind.

### **Future Brand Direction**

As noted in the discussion on the current brand, the Murraylands brand has, to date, been primarily focused on the core attribute, the River Murray. This focus has been in part due to it being the distinguishing and unique feature of the region, and in part due to the varying participation of the local government partners. The implementation of the MIRSTP, will require the development of a differentiated 'brand strategy', based upon an understanding of the region's target markets and inherent attributes.

To this end, this section explores the brand proposition for the wider Murraylands region and its key attributes.

## **Current assets**

The key regional assets or resources have been identified as:

- The River Murray
- Houseboats and Cruise Boats
- Monarto Zoological Park
- National and Conservation Parks
- Aboriginal Culture
- Murraylands Culture and Heritage
- Recreation
- Events
- Visitor Information Centres
- Accommodation
- Food
- Diversity

## **Refined brand rationale**

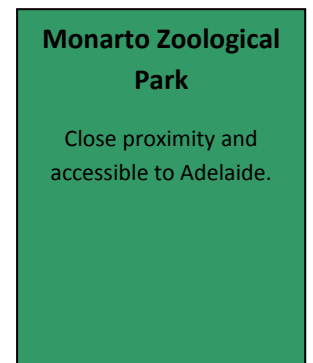
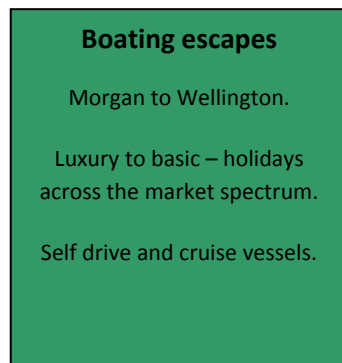
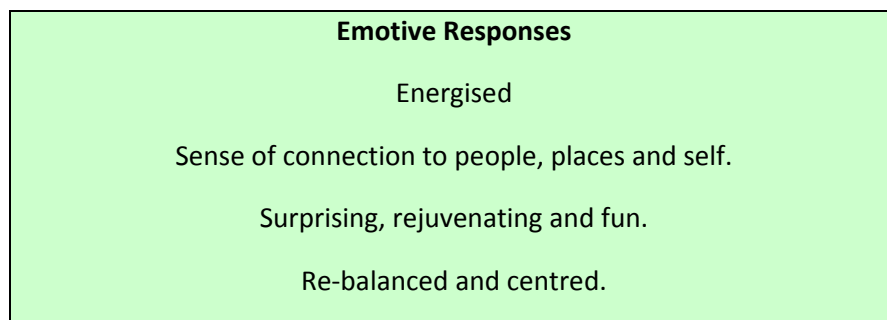
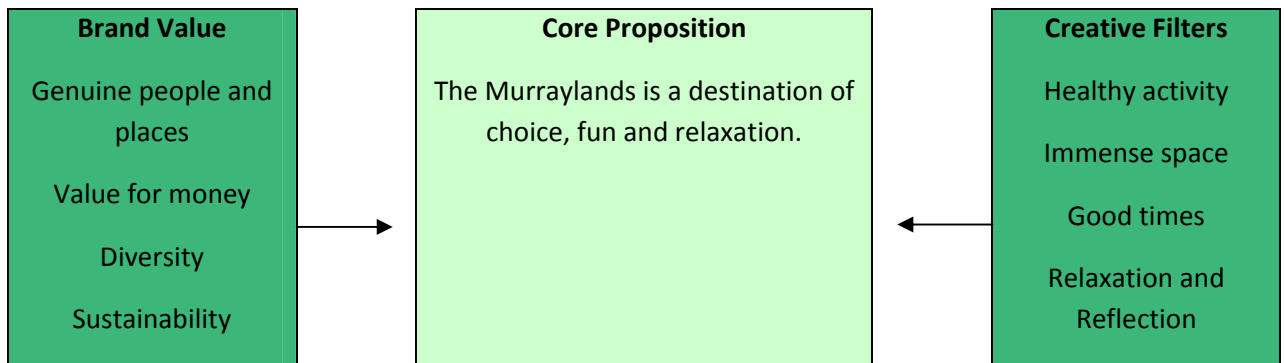
A review of the current brand, noting changing consumer demands and a broader regional context, highlighted that a refined Murraylands brand will be influenced by:

- Current low brand recognition.
- Extended large, diverse, nature based environments (beyond the River).
- Consumer desire for physical activity, immersive experiences and shorter more intense holidays.
- Active participation and engagement with the natural landscapes (River, Lakes and Coorong).
- Future development opportunities concentrated around the natural environment and authentic experiences.
- Accessibility and proximity to Adelaide.
- Unique appeal of the houseboat and cruise vessel's industry sector.

Our evolving target markets are characterised by:

- Generally younger clientele.
- Strong day trip audience.
- Growing demand for energising experiences.
- The more discerning tastes of consumers 50+.

## Refined Murraylands Brand Proposition



## Consistency with the South Australian Tourism Brand

The refined Murraylands brand proposition has a strong alignment with many aspects of the current State brand and also the new logo for the Murraylands Regional Tourist Association (MRTA). The alignments and synergies are demonstrated in the following table.

South Australia has implemented a brand that aims to develop and promote the best South Australia has to offer. The core proposition of Brand SA is *'that South Australia is a vibrant and welcoming place that celebrates the good things in life'*. The MRTA has released a new logo and website that promotes the Murraylands as an *'unexpected, surprising and unassuming destination'*.

The consistency with both the South Australian brand and the MRTA message means that the Murraylands has an opportunity to position itself as a unique and individual region.

## Aligning the Murraylands Brand with Brand SA

	Murraylands	South Australia	MRTA
Core Brand Proposition	The Murraylands is a destination of choice, fun and relaxation	A vibrant and welcoming place that celebrates the good things in life.	Its unexpected!
Brand Values	Genuine people & places Value for money Diversity Sustainability	Clean and green Genuine and personal Free thinking Living heritage & tradition	Authentic Friendly Natural
Creative Filters	Healthy activities Good times Immense space Relaxation and reflection	Enviably lifestyle Good times Authentic experiences Inspiring moments	Fun Relaxing Space Family
Rational Benefits and Emotive Responses	Energised Sense of connection to people and places Surprising, rejuvenating and fun. Re-balanced and centred. Outdoor adventure Reconnecting with family and friends and self. Exploring towns, heritage and culture.	Indulgence and appreciate of the good life.  A surprising discovery that inspires and challenges  Intimate encounters with nature and people  Participation and celebration of heritage and culture	An unexpected discovery of the region.
Attributes	Vast natural landscapes Boating escapes Extensive recreational, sporting and event opportunities Monarto Zoological Park	Festival spirit. Unspoilt nature at close proximity. Enterprising tradition of creativity and innovation.	Murray River soul and spirit of the region Golden landscapes Blue skies Good times

## ***Moving Forward***

The Murraylands Brand must reflect the key and emerging attributes of the wider region.

There is general willingness within the community to collaborate in joint marketing and branding efforts.

### **Implementation of the Refined Murraylands Brand Proposition**

As outlined in the previous section, the current Murraylands Brand Strategy needs refinement to reflect the key attributes of the whole of the region and the changing nature of consumer expectations.

The MIRSTP consultation and research process has identified that branding, marketing and promotion of Murraylands tourism can be both difficult (given the perception of the River Murray) and parochial (multiple organisations with differing, but similar brand messages). However industry and community representatives are collectively passionate about promoting the tourism opportunities within the region.

The MIRSTP consultation and research process also identified a general willingness from local government, industry and community to collaborate in joint marketing and branding efforts. The implementation of the MIRSTP will enable relationships to be developed that will encourage more effective collaboration.

External, specialist support will assist the region to reach consensus on an effective branding strategy and work towards collaborative marketing strategies.

### **Goal 5**

The Murraylands is repositioned as a region of choice that is vibrant, fun and active.



# Sustainable Tourism Development

## *Growing Opportunity*

Sustainable tourism development provides an opportunity to benefit tourism operators, local communities, the regional economy and the natural environment.

Opportunities to highlight the need to maintain environmental flows in the River Murray through to the Murray Mouth should be utilised to support water flows for Murraylands tourism.

There is an opportunity for the Murraylands tourism industry to proactively respond to climate change predictions by encouraging further research and planning.

Sustainable tourism development needs to address economic, social and environmental issues. A sustainable approach to tourism has the capacity to benefit local communities, economically and socially, and to raise awareness and support for conservation of the environment.

Sustainable tourism development should be responsive to the constraints of the natural and cultural environment, and to the needs of visitors. A well designed development should be managed to provide opportunities to bring visitors physically closer to the natural and cultural values of a site. This enables the sensory features of the environment, such as sights, smells and sounds, to be fully appreciated.

Sustainable tourism development will also utilise new technologies in designing and constructing tourism infrastructure and, in promoting tourism. Environmentally sound technologies which have the potential for significantly improved environmental performance are recommended. Examples are provided in appendix 8.

A sustainable approach can be developed by utilising the SATC Sustainable Tourism Package which is a series of aligned initiatives and projects consistent with South Australia's tourism vision. The information in this package will assist developers when planning and developing tourism product, activities and infrastructure.

### **River Water Flows**

The issue of water flow in the River Murray and wetlands will need to be considered in future tourism planning. A lack of flows will result in lower water levels, lower water quality and reduced access for water activities in some areas. To maintain a sustainable tourism industry the Murraylands industry needs to provide support for and highlight the importance of environmental flows in the lower Murray through to the Murray Mouth.

## Climate Change

Current information about the impacts of climate change predict that River water flows will continue to be lower in the long term. This is likely to impact on the Murraylands tourism industry, as will costs associated with adapting to an emissions trading scheme. Therefore consideration needs to be given to how the industry can adapt and plan effectively to respond to these changes.

## Moving Forward

Use of the *Design Guidelines for Sustainable Tourism Development* and environmental guidelines will help the Murraylands tourism industry move towards an integrated, sustainable model which supports the community, regional development and the natural environment.

## Design guidelines for sustainable tourism development

The SATC Sustainable Tourism Package includes the *Design Guidelines for Sustainable Tourism Development*. It is recommended that the Design Guidelines are utilised to assist tourism developers understand how to respond to the key issues involved in the design of sustainable tourism developments. These guidelines aim to encourage and assist the private sector to undertake small to medium-sized sustainable tourism developments.

Undertaking tourism development, particularly in natural areas, requires a broad range of knowledge from different disciplines and stakeholders. Gathering this knowledge enables the designer to have a better understanding of the impacts of a development, allowing them to prepare concepts and proposals that are responsive to the natural and cultural environment and the needs of visitors and the community.

## Minimising environmental impacts

A summary of potential impacts to key conservation features in the Murraylands and the challenges posed by tourism developments was provided in the *Strategic Rationale* section and mechanisms to avoid or minimise the impacts or to provide a net benefit are included in appendix 7.

Many of these environmental challenges can be addressed by following appropriate environmental guidelines including those provided in appendix 8. A good guideline example is the *Sustainable Recreation Guide, How to have fun with minimal impact on the River Murray* prepared by MurrayCare which is available free from several websites.

The environmental guidelines in appendix 8 are intended to provide preliminary guidance for tourism operators and Councils about future tourism developments, experiences or activities that are environmentally appropriate, environmentally responsible and minimise negative impacts on the environment. The information provided is intended to relate to developments proposed for private land, but is also relevant for Councils.

A checklist for planning sustainable tourism development is provided in appendix 8. For developers considering purchasing a property to use for tourism activities or developing land for tourism accommodation, following the checklist will assist in addressing matters required as part of a planning and development application. It also includes the details of relevant agencies who must give approval for specific activities or who should be contacted for advice. A list of relevant key contacts who can provide information, advice and support in planning and implementing tourism developments and experiences is also included in appendix 8.

## **Goal 6**

The Murraylands tourism industry is supported by effective environmental and planning structures.



# Planning Framework

## *Growing Opportunity*

Implementing the Murray and Mallee Regional Land Use Framework and the Better Development Plans project provides an opportunity for the Councils in the Murraylands to consistently update their Development Plans in relation to tourism development.

When finalised, the Murray and Mallee Regional Land Use Framework will guide future land use and development in the Murraylands and Riverland regions. The maps, policies and strategies contained in the Framework will provide statutory direction for Councils to prepare changes to their local area Development Plans.

Once the Framework for the Murray and Mallee region has been released (early 2009), affected Councils are expected to conduct reviews of their Development Plans to incorporate the provisions of the Framework, and present new Development Plans in the format prescribed under the Better Development Plans (BDP) project by mid-2011.

At this stage none of the five Councils in the Murraylands region has formally commenced 'conversion' of existing Development Plans to the BDP format. However, Murray Bridge is expected to do so 'shortly'; and Coorong Council would similarly commence the process if assistance becomes available from Planning SA.

Neither Karoonda East Murray nor Southern Mallee Councils rate conversion as a high priority, particularly the former which consolidated a general revision of its Development Plan in mid-2005.

Mid Murray Council is not intending to convert to BDP in the short term, as there are several Development Plan Amendments (including review of the Recreation and Tourism Policy Area) arising from its recent Section 30 review of the Development Plan still 'in the pipeline'. It is envisaged that the DPA affecting recreation and tourism will follow the latest BDP State-wide policy.

At the heart of the Better Development Plans project is a set of Development Plan policies that deal with issues common to most councils. These policies – referred to as the Planning Policy Library - have been derived from the Development Plans of a number of councils and input from a number of government agencies and are regularly updated. As discussed in the *Strategic Rationale* section, version 4 of the Planning Policy Library was released in December 2008, with the section on tourism development substantially revised.

## ***Moving Forward***

Tourism development will be able to move forward more effectively when the confusion regarding the assessment of development applications is reduced through the use of consistent planning policies in the region.

For Murraylands Councils other than Mid Murray, there is an opportunity to examine Version 4 Policy statements, particularly as they relate to tourism development, and to incorporate those statements (with or without amendment) into the conversion process described above.

In the case of Mid Murray Council, it is recommended that tourism related development be included in a separate BDP DPA as presently intended.

### **Goal 6**

The Murraylands tourism industry is supported by effective environmental and planning structures.

# Implementation

## The Murraylands Integrated Regional Strategic Tourism Plan



## Guiding principles

The guiding principles of the MIRSTP are to:

- Focus all efforts and resources on “the big picture”.
- Focus on opportunities and strategies that will make the biggest difference, namely that the ‘rising tide raises all boats’.
- Strengthen connection with nearby regions to support tourism development from a consumer’s perspective.
- Actively encourage collaboration within the region.
- Support active operator participation and ownership of the implementation process.
- Deliver a responsive Implementation Framework that can be amended to reflect changing regional dynamics.
- Transfer strategic leadership to operators over time.
- Retract strategic leadership from local government over time.

## Resourcing

Many of the goals identified in the MIRSTP will require resourcing, including funding, from a range of sources. Where possible, the resourcing of relevant strategies and actions has been identified in the Action Planning Matrix that supports the MIRSTP.

Achievement of the MIRSTP goals will require a partnership approach and it will be necessary for stakeholders to align these goals with their own organisational strategies and commit funds accordingly.

There are also opportunities to leverage these funds by obtaining grant funding. A list of potential grant sources to implement the plan is provided in appendix 9.

The MIRSTP has been developed on the assumption that funding opportunities are successful. Likelihood of success (of funding) is increased given the sound research, planning and implementation methodology that has been deployed in the development of the MIRSTP.

However, given the changeable nature of resourcing resulting from global economic instability, the MIRSTP must not rely solely on external funding to be delivered. It is therefore critical that the implementation of the MIRSTP is supported by active Working Parties comprised of a genuine mix of operators, community and facilitation partners.

Active and committed Working Parties will mean that much of the MIRSTP can be delivered through creative and innovative partnerships, rather than relying on external facilitation and funding support.

## Risk Analysis

Risk is the chance of something happening that will have an impact upon objectives and is rated in terms of likelihood and consequences. This risk analysis considers implementation in a strategic context and relates to the ability to achieve goals, strategies and actions. As highlighted in the previous sections there are many issues that need to be considered and addressed for sustainable tourism growth to occur in the Murraylands. These issues may create risks for the implementation of the plan. Some of the key issues that need to be considered are evaluated in table 5. Key actions to ensure these risks are managed are also provided. Engagement with all stakeholder groups, especially operators, and effective communication have been identified as critical actions to address risk and achieve implementation.

**Table 5: Risk analysis for implementation of the MIRSTP.**

RISK	RISK CONTROL	RISK RATING	EVALUATION ACTION
<b>Governance</b>			
Key stakeholders do not engage with the plan.	Effective communication maintained with representatives of all stakeholders.	High	Engage with all stakeholder groups including operators as a high priority.
Working parties do not operate effectively.	MRDB tasked to provide overarching governance.  Terms of Reference developed.  Communication maintained.	Significant	Develop and implement Terms of Reference.
<b>Product and Experience Development</b>			
Lack of funding for development and implementation of new products.	Key stakeholders to allocate funds.  TPED Working Party to actively pursue grant funding.	Significant	Engage with operators as a high priority.
<b>Business and Industry Development</b>			
Lack of engagement of operators and community.	Utilise proven models to improve operator and community engagement (e.g. Morgan).	Significant	Confirm a suitable model for engagement.
<b>Infrastructure Development</b>			
Lack of funding for infrastructure and major projects.	Key stakeholders to allocate funds to relevant projects.  STID Working Party to actively pursue investment.	Significant	Appraise private sector investors of investment opportunities.

Brand and Marketing Development			
Lack of engagement with the Murraylands Brand.	Develop and action a plan to communicate the Murraylands Brand to stakeholders, especially operators.  Confirm marketing responsibilities.	Significant	Communicate brand as a high priority.
Disparate marketing messages deployed.	Clarify marketing message.  Seek agreement on regional marketing boundaries.	Low	
Environment and Planning Advocacy			
Environmental issues and values are ignored and value of tourism activities is reduced.	Continue to consider environmental issues and values when planning projects.  Research potential impacts and plan for change (e.g. diversification with new product)	High	Ensure environment is considered when planning projects.
Uncoordinated regional planning policies continue.	Regular communication between local government partners.	Low	



# Murraylands Integrated Regional Strategic Tourism Plan

## Implementation Framework

### Governance

*Goal 1: Implementation of the MIRSTP is achieved via genuine, cross sectoral and active regional participation.*

Strategies:

- 1.1 Task the Murraylands Regional Development Board to facilitate the development of an independent MIRSTP Implementation Working Party.
- 1.2\* The MIRSTP Implementation Working Party is supported by formalised working relationships with:
  - Murraylands Tourism Product and Experience Development Working Party.
  - Regional Events & Festivals Working Party.
  - Murraylands Tourism Marketing.
  - Strategic Tourism Industry Development Working Party.
  - Ngarrindjeri Vision for Country Cultural Tourism Plan Implementation Group.
- 1.3 In conjunction with operators, investigate opportunities for collaboration with neighbouring regions for marketing.
- 1.4 Engage with all tourism and business groups operating in the Murraylands region to clearly identify opportunities for collaboration and support for implementation of the MIRSTP.

\*Proposed MIRSTP Implementation Framework provided on page 58.

## Key Result Area

### Business and Industry Development

*Goal 2: A self reliant tourism industry that has access to relevant and practical business and industry support.*

Strategies:

- 2.1 Actively pursue and develop an online education and upgrade strategy for tourism operators.
- 2.2 Develop an active tourism operator mentoring program.
- 2.3 Secure targeted business development resources to assist operators with business planning, review, research and new product development activities.
- 2.4 Develop a community education strategy to promote the value and potential of the tourism industry in the Murraylands.
- 2.5 Ensure that a skilled and flexible workforce is available to the Murraylands Tourism industry by:
  - 2.5.1 Developing a *Murraylands Tourism Workforce Development Strategy* that is linked to the overarching *Murraylands Workforce Development Strategy* facilitated by the Murraylands Regional Development Board.
  - 2.5.2 Securing a range of in-region training and development opportunities for the tourism workforce including:
    - Marketing, sales and customer service training.
    - Quality service development and delivery

## Key Result Area

### Product and Experience Development

*Goal 3. A diverse range of new products are developed specifically to increase visitor yield, stay and experience.*

#### Strategies

- 3.1 Establish a cross regional, operator and community based, 'Murraylands Tourism Product and Experience Development Working Party'.
- 3.2 Task the Murraylands Tourism Product and Experience Development Working Party to:
  - 3.2.1 Actively pursue and support the implementation of the Tourism Product and Experience Development Officer (TPEDO) role.
  - 3.2.2 Facilitate the conceptual development and implementation of three regional trails that link the Murraylands region, with a key focus on: heritage (particularly rail); food and the linking of existing trails.
  - 3.2.3 Facilitate the development of a range of specific proposals for a range of new experiences including: 4WD tours and astronomy.
- 3.3 Actively support the implementation of the *Ngarrindjeri Vision for Country – Cultural Tourism Plan* (see appendix 11).
- 3.4 Prepare a coordinated Regional Events & Festivals Strategy to maximise visitor yield and access.
- 3.5 Support new and existing operators to identify opportunities to value add to existing product through collaborative regional planning workshops.
- 3.6 Support existing domestic and international operators to bundle packages suitable for both the domestic wholesale and international markets.

## Key Result Area

### Infrastructure Development

*Goal 4: The Murraylands tourism industry sector is supported by quality infrastructure that meets the needs of both community and visitors.*

Strategies:

- 4.1 Establish a cross regional '*Strategic Tourism Industry Development Working Party*'.
- 4.2 Task the *Strategic Tourism Industry Development Working Party* to:

Develop a ten year infrastructure workplan for the Murraylands Tourism Industry sector to progress both the high and low priority projects including:

  - 4 Star Accommodation
  - Conference facilities with water views
  - Accommodation development including Monarto, cabins, caravan and motor home facilities
  - Improved broadband access and signage upgrades
- 4.3 Develop a new *Strategic Tourism Industry Development Officer (STIDO)* position to progress the identified infrastructure and major projects detailed in the Murraylands Tourism Infrastructure Workplan.
- 4.4 Review Visitor Information Centres to determine the most strategically efficient network of centres.

## Key Result Area

### Brand and Marketing Development

*Goal 5: The Murraylands is repositioned as a region of choice that is vibrant, fun and active.*

Strategies:

- 5.1 Include collaborative strategies in the *Murraylands Tourism Marketing Strategy* so that it is inclusive of all regional MIRSTP council boundaries.
- 5.2 Secure a brand specialist to reposition the Murraylands Region by redefining the Murraylands Brand promise and re-focusing marketing activity on the regions defining attributes.
- 5.3 Progress a range of active relationships to promote a borderless river trail for consumers.
- 5.4 Develop strategic partnerships to develop an online strategy for marketing the region.
- 5.5 Support operators, community members and volunteers with an education strategy regarding the application of the refined brand.

## Key Result Area

### Environment and Planning Advocacy

*Goal 6: The Murraylands tourism industry is supported by effective environmental and planning structures.*

Strategies:

- 6.1 Ensure tourism development and activities operate effectively within the natural environment and enhance environmental assets by:
  - 6.1.1 Actively highlighting the need to maintain flows in the River Murray.
  - 6.1.2 Actively promoting sustainable design principles and encouraging environmentally appropriate design.
  - 6.1.3 Encouraging environmentally sustainable tourism activity.
  - 6.1.4 Researching and planning for the impacts of climate change on the natural and operating environment for tourism.
  
- 6.2 Minimise existing planning constraints by the coordinated amendment of all five Development Plans.

## Actions

### Phase 1 (2009 - 2010)

### Phase 2 (2011 – 2013)

	Strategy	Actions	Timeline	Lead	KPI
Governance	1.1. Task the MRDB to facilitate the development of an independent MIRSTP Implementation Working Party.	Develop and formalise a Terms of Reference and reporting framework for the MIRSTP Implementation Working Party.	2009 & 2010	MRDB	MIRSTP Implementation Working Party established.  Terms of Reference established.
		Review and maintain the status of the MIRSTP Implementation Working Party.	2011 – 2013	MRDB	MIRSTP is delivered and evolves.
	1.2. The MIRSTP Implementation Working Party has a bias towards action and is supported by active, formalised working relationships.	Formalise an operating relationship and/or Terms of Reference and reporting framework for the MIRSTP Implementation Structure.	2009 & 2010	MIRSTP Imp Committee	Implementation Structure formalised.
		Review and maintain the status of the MIRSTP Implementation Framework.	2011 – 2013	MRDB	MIRSTP is delivered and evolves.

	1.3. In conjunction with operators, investigate opportunities for collaboration with neighbouring regions for marketing.	Instigate discussions with operators, the Coorong District and Mid Murray Councils.  Formalise service delivery and collaboration arrangements.	2009 & 2010	MTM	Operators actively collaborating between regions to support the implementation of the MIRSTP.
		Review service delivery and collaboration arrangements for continuing relevance.	2011 – 2013	MTM	MIRSTP retains currency and application.
	1.4. Engage with all tourism and business groups operating in the Murraylands region to clearly identify opportunities for collaboration and support for implementation of the MIRSTP.	Individually meet with all relevant business groups.  Seek, identify and explain the opportunities to get involved with the MIRSTP.  Host a group workshop to formalise responsibilities and arrangements.	2009 & 2010	MIRSTP Imp Committee	Business groups actively supporting the implementation of the MIRSTP.
Business and tourism groups clearly identify their role in achieving the MIRSTP.  Business and tourism groups adapt changed objectives to meet the needs of MIRSTP implementation.		2011 – 2013	MRDB	Business and tourism groups collaborate to achieve MIRSTP implementation.	

	Strategy	Actions	Timeline	Lead	KPI
Business & Industry Development	2.1. Actively pursue and develop an online education and upgrade strategy for tourism operators.	Work with Murray and Mallee Broadband Development Officer and MTM to develop an immediate education strategy for operators.	2009 & 2010	MRDB	30 operators participate in online education workshops.
		Collaborate with a range of providers to deliver targeted workshops for operators to increase online presence.		MRDB	20 operators increase online presence by 2010.
		Explore, develop and establish a booking portal/s for the Murraylands.	2011 – 2013	MTM	40 operators are linked to a centralised booking system.
	2.2. Develop an active tourism operator mentoring program.	Access <i>Small Business Advisory Services (Aus Industry)</i> funding to deliver mentoring support.	2009	MRDB	20 operators access targeted mentoring support.
Develop project brief and secure resources for a Regional Tourism Mentoring Strategy (Phase 2).		2011 – 2013	MRDB	Operators are able to identify and access appropriate mentoring support.	

2.3. Secure targeted business development resources to assist operators with business planning, review, research and new product development activities.	Access <i>Small Business Advisory Services (Aus Industry)</i> funding to deliver business development support.	2009	MRDB	10 operators access targeted business development support.
	Review the success of phase 1, business development support program. Refine and develop a phase 2 program in consultation with operators. Deliver ongoing, targeted, business development support to tourism operators.	2011 – 2013	MRDB	Ongoing business development support is locally available to operators.
2.4. Develop a community education strategy including a focus on youth, to promote the value and potential of the tourism industry in the Murraylands.	Promote the development of the MIRSTP and targets.	2009	MIRSTP Imp Committee	Minimum of 5 regional workshops delivered. Education strategy delivered.
	Deliver a series of regional ' <i>What is Tourism</i> ' workshops.	2010		
	Develop an education campaign to work with the 'extended tourism industry sector (bakeries, pubs, service stations) to explain the tangible value of tourism.	2011	MTM	Murraylands community understands their role in the tourism industry

	<p>2.5. Ensure that a skilled and flexible workforce is available to the Murraylands Tourism industry by:</p> <p>2.5.1. Developing a <i>Murraylands Tourism Workforce Development Strategy</i> that is linked to the overarching <i>Murraylands Workforce Development Strategy</i> facilitated by the MRDB.</p> <p>2.5.2. Securing a range of in-region training and development opportunities for the tourism workforce.</p>	<p>Work with the Murraylands Employment and Skills Formation Network and the MRDB to develop a pilot Workforce Development Strategy for the tourism industry.</p> <p>Access <i>Department of Trade &amp; Economic Development (DTED) Workforce Development</i> funds to support a range of in-region training.</p>	2009	M/Lands ESF Network	<p>Tourism Workforce Development Strategy developed.</p> <p>Tourism Workforce Development Strategy integrated with Murraylands regional strategy.</p> <p>Local training opportunities provided.</p>
		<p>Ongoing implementation and refinement of the pilot Workforce Development Strategy for the tourism industry.</p>	2011 – 2013	M/Lands ESF Network	<p>Local workforce development opportunities provided.</p>

	Strategy	Actions	Timeline	Lead	KPI
Product & Experience Development	3.1. Establish a cross regional, operator and community based, <i>'Murraylands Tourism Product and Experience Development Working Party'</i>	Identify and invite a diverse range of operators and community members to participate on the Working Party.  Develop Terms of Reference and Reporting Framework for the Working Party.	2009 & 2010	MRDB	Murraylands Tourism Product & Experience Development Working Party established.
		Review success and outcomes of the MTPED Working Party.  Continue to support the MTPED Working Party.	2011 – 2013	MTPED Working Party	Review complete.  Revised workplan in place.
	3.2. Task the <i>Murraylands Tourism Product and Experience Development Working Party</i> to:  3.2.1. Actively pursue and support the implementation of the Tourism Product and Experience Development Officer (TPEDO) role.	Develop a workplan for the MTPED Working Party that includes: <ul style="list-style-type: none"> <li>▪ The TPEDO 2009 workplan. A short term focus on the opportunities for development that will realise immediate yield.</li> <li>▪ Shortlisting a preferred regional trail and develop it's concept to feasibility stage.</li> <li>▪ Shortlisting two new major products/experiences to develop to feasibility stage.</li> </ul>	2009	MTPED Working Party	MTPED Work Plan developed and milestones achieved.  TPEDO Workplan confirmed and milestones achieved.

	<p>3.2.2. Facilitate the conceptual development and implementation of three regional trails that link the Murraylands region, with a key focus on: heritage (including rail); natural landscapes and 4WD adventure tours.</p> <p>3.2.3. Facilitate the development of a range of specific proposals for a range of new experiences including: birdwatching, astronomy and flight experiences.</p>	Develop a successive workplan for the MTPED Working Party and the TPEDO position.	2010	MTPED Working Party	TPEDO Succession Plan developed.
		<p>Assess the continuing need for, and achievements of the TPEDO role.</p> <p>Refine the workplan for the MTPED Working Party that includes:</p> <ul style="list-style-type: none"> <li>▪ Shortlisting a further two regional trails and develop their concepts to feasibility stage.</li> <li>▪ Shortlisting a further two new major products/experiences to develop to feasibility stage.</li> </ul>	2011 – 2013	MTPED Working Party	Refined MTPED Work Plan developed and milestones achieved.
	<p>3.3. Actively support the implementation of the <i>Ngarrindjeri Vision for Country – Cultural Tourism Plan</i></p>	Meet with key proponents of the Ngarrindjeri Vision for Country – Cultural Tourism Plan to facilitate broad industry support for its implementation.	2009 & 2010	MIRSTP Implementation Committee	4 joint meetings held with MIRSTP Implementation Committee.
		Continued support for the <i>Ngarrindjeri Vision for Country Cultural Tourism Plan</i> .	2011 – 2013	MIRSTP Implementation Committee	4 joint meetings held with MIRSTP Implementation Committee.

	3.4. Prepare a coordinated Regional Events & Festivals Strategy to maximise visitor yield and access.	Establish a Regional Events & Festivals Working Party.  Develop Terms of Reference and Reporting Framework for the Working Party  Develop a project brief and secure resources for a Regional Events & Festivals Strategy.	2009	Regional Events & Festivals Working Party	Working Party Established
		Develop and deliver a Regional Events & Festivals Strategy.	2010	Regional Events & Festivals Working Party	Strategy resourced and developed.
		Develop and deliver an ongoing Regional Events & Festival Strategy.	2011 – 2013	Regional Events & Festivals Working Party	Regional events are linked and coordinated on an annual basis.
	3.5. Support new and existing operators to identify opportunities to value add to existing product through collaborative regional planning workshops.	Access <i>Department of Trade &amp; Economic Development (Better Business)</i> funding to deliver collaborative planning workshops in 2009.  Access support via new South Australian Tourism Industry Body (formerly SATAB, SATA).	2009 & 2010	MRDB  SATIC	Operators supported to attend group based value adding workshops.

		Access ongoing support via new South Australian Tourism Industry Body (formerly SATAB, SATA)	2011 – 2013	SATIC	Operators continue to be supported to attend group based value adding workshops.
	3.6 Support existing domestic and international operators to bundle packages suitable for both the domestic wholesale and international markets.		2009 & 2010		
			2011 – 2013		

	Strategy	Actions	Timeline	Lead	KPI
Infrastructure Development	4.1. Establish a cross regional ' <i>Strategic Tourism Industry Development Working Party</i> '.	Identify and invite regional planning and development staff to participate on the Working Party.  Develop Terms of Reference and Reporting Framework for the Working Party.	2009 & 2010	MIRSTP Imp Committee	Murraylands Strategic Tourism Industry Development Working Party established.
		Review success and outcomes of the STID Working Party.  Continue to support the STID Working Party.	2011 – 2013	STI Working Party	Review and support undertaken.
	4.2 Task the <i>Strategic Tourism Infrastructure Working Party</i> to develop a ten year infrastructure workplan.	Workshop and prioritise regional tourism infrastructure priorities identified in the MIRSTP.  Develop 10 year infrastructure plan including lead agencies, urgency, risk and investment value.	2009	STI Working Party	Infrastructure Plan developed.  Key priorities identified.
Key infrastructure priorities identified in the plan are actively progressed.		2011 – 2013	STI Working Party	New tourism infrastructure is realised.	

	4.3. Develop a new <i>Strategic Tourism Industry Development Officer (STIDO)</i> position to progress Murraylands Tourism Infrastructure Workplan.	Resource and employ a STIDO to progress the Infrastructure Plan.	2010	STI Working Party	STIDO employed.
		<ul style="list-style-type: none"> <li>▪ STIDO position resourced.</li> <li>▪ STIDO workplan confirmed.</li> <li>▪ STIDO workplan, milestones and successes reviewed.</li> </ul>	2011 & 2012	STID Working Party	Key milestones in the STIDO workplan are achieved.
			2013		
	4.4 Review Visitor Information Centres to determine the most strategically efficient network of centres.	Determine feasibility of a high quality, high profile Visitor Information Centre and Regional Showcase Centre in the region.	2009 & 2010	SATC STID Working Party	Feasibility of a strategic VIC determined.
		Realign Visitor Information Centres to create networks which focus on adding to the visitor experience.	2011 - 2013	SATC STI Working Party	Visitor Information Centres meeting consumer demand.

	Strategy	Actions	Timeline	Lead	KPI
Brand & Marketing Development	5.1. Include collaborative strategies in the <i>Murraylands Tourism Marketing Strategy</i> so that it is inclusive of all regional MIRSTP council boundaries.	Build the brand focus in line with the key attributes of the broader region and implement collaborative marketing strategies.	2009	MTM	Marketing Strategy includes collaboration with neighbouring regions.
		Continue implementation of collaborative marketing strategies in line with the key attributes of the broader region.	2011 – 2103	MTM	Collaboration with neighbouring regions maintained.
	5.2. Secure a brand specialist to reposition the Murraylands Region by redefining the Murraylands Brand promise and re-focusing marketing activity on the regions defining attributes.	Develop a project brief for the contracted brand specialist to undertake a detailed brand strategy including the creation of new brand guidelines, collateral and creative content.  Refine the Murraylands Brand based on the refined brand strategy.	2009	MTM	Murraylands brand refined and implemented.
		Murraylands Brand further refined to take into account new and emerging product (particularly indigenous, day trip and experiential opportunities).  Ongoing refinement of the Murraylands Brand and marketing activities to reflect changing product mix.	2011	MTM	Murraylands marketing evolves with new product development.
			2012 & 2013		

	5.3. Progress a range of active relationships to promote a borderless river trail for consumers.	Instigate discussions with a range of providers to formalise a working partnership that promote the region.	2009 & 2010	MTM	MOU with service providers in place.
		Develop a MOU to confirm operating principles of partnership/s.			
		Realise the partnership opportunities by supporting operators to access agreed services (in the MOU).	2011 – 2013	MTM	Operators have access to multilateral marketing support.
	5.4. Develop strategic partnerships to develop an online strategy for marketing the region.	Online strategy to include education of operators, in conjunction with specific online marketing initiatives.	2009 & 2010	MTM	MOU with service providers in place.
		Instigate discussions with range of providers to promote active support for operators.			
		Develop a MOU to confirm operating principles of partnership.			
		Make a (MTM) budget allocation to support operators online marketing initiatives including workshops.			

		Actively promote the strategic partnerships and their tangible support for operators.  Combine MTM and operator budget allocations to maximise marketing support.	2011 – 2013	MTM	Increased online presence and marketing standards of operators is achieved.
	5.5. Support operators, community members and volunteers with an education strategy regarding the application of the refined brand.	Develop a ' <i>How to use the Murraylands brand</i> ' guide for operators, volunteers and the community.	2009	MTM	Brand awareness campaign delivered.
		Develop an education campaign to work with the 'extended' tourism industry sector (bakeries, pubs, service stations) to explain the application of the refined Murraylands brand.	2011	MTM	Broad community awareness of the refined Murraylands brand and its application.

	Strategy	Actions	Timeframe	Lead	KPI
Environment and Planning Advocacy	<p>6.1 Ensure tourism development and activities operate effectively within the natural environment and enhance environmental assets by:</p> <p>6.1.1 Actively highlighting the need to maintain flows in the River Murray, Lakes and Coorong.</p> <p>6.1.2 Actively promoting sustainable design principles and encouraging environmentally appropriate design.</p> <p>6.1.3 Encouraging environmentally sustainable tourism activity.</p> <p>6.1.4 Researching and planning for the impacts of climate change on the natural and operating environment for tourism.</p>	<p>Work with the River Murray WAP process to promote the need for environmental flows.</p> <p>Lobby Federal government to ensure economically viable flows are maintained.</p> <p>Ensure tourism participants are aware of relevant environmental guidelines.</p> <p>Develop and distribute a Rivercraft Environmental Education Kit.</p> <p>Develop a plan to develop and maintain infrastructure to support rivercraft to reduce environmental impacts. (Link to strategy 4.2).</p>	2009 & 2010	MIRSTP Imp Committee	<p>Recreational water levels are sustained.</p> <p>Operators have access to good environmental and rivercraft information.</p> <p>Rivercraft infrastructure plan developed.</p>
		<p>Continued work with the River Murray WAP process to promote the need for environmental flows.</p> <p>Continued lobbying of the Federal government to ensure economically viable flows are maintained.</p> <p>Review the success and ongoing need for environmental and rivercraft education programs.</p>	2011 – 2013	MIRSTP Imp Committee	<p>Recreational water levels are sustained.</p> <p>Operators have access to good environmental and rivercraft information.</p>

		<p>Implement the Rivercraft Infrastructure program (see also 4.2).</p> <p>Research the potential local impacts of climate change on the Murraylands tourism industry.</p> <p>Plan for, and respond to, the impacts of climate change.</p>			Rivercraft infrastructure plan implemented.
	6.1 Minimise existing planning constraints by the coordinated amendment of all five Development Plans.	Strategic Tourism Industry Development Working Party to convene regional discussions on Development Plan amendments.	2009 & 2010	STID Working Party	Development Plans amended with consistency.
		A Development Plan Amendment process in the Murraylands is coordinated and undertaken.	2011 – 2013	STID Working Party	Development Plans amended with consistency.