

SOUTH
AUSTRALIAN

REGIONAL

VISITOR
STRATEGY



Realising the potential of the
regional visitor economy by 2020



**THERE'S NEVER BEEN A BETTER TIME
TO PLAN FOR A STRONGER TOURISM
FUTURE FOR SOUTH AUSTRALIA.**

**THE OPPORTUNITY IS THERE, AND
THIS STRATEGY AIMS TO SEIZE IT.**

Contents

Introduction

Message from the Chair.....	2
Message from the Minister.....	3
Executive summary	4
What is the visitor economy?	6
South Australian Tourism Plan 2020.....	7
Importance of regional tourism.....	8
Regional visitor snapshot.....	9
Stakeholders.....	10

Strategic pillars

Marketing	12
Collaboration	14
Accommodation	15
Experience development	16
Events	17
Industry capability	18
Cost of doing business.....	19
Visitor infrastructure	20

Regional response priorities

Adelaide Hills.....	23
Barossa.....	26
Clare Valley	29
Eyre Peninsula.....	32
Fleurieu Peninsula.....	35
Flinders Ranges and Outback.....	38
Kangaroo Island	41
Limestone Coast.....	44
Murray River, Lakes and Coorong	47
Riverland	50
Yorke Peninsula.....	53

**OUR REGIONS ARE CRITICAL TO THE
SUCCESS OF SOUTH AUSTRALIAN
TOURISM. WE ARE KEEN TO WORK
TOGETHER TO BUILD A DYNAMIC AND
FLOURISHING SOUTH AUSTRALIA.**

Message from the Chair

Regional tourism in South Australia is an economic powerhouse. Over 5,000 tourism operators work closely with regional tourism organisations, local government and key players to generate more than 40% of South Australia’s visitor revenue.

In 2015 the leaders of the 11 regional tourism organisations initiated a review to identify the successes, challenges, and digital disruption affecting South Australian regional tourism. Their aim was to realise the outstanding potential of regions in an era of growth for Australian tourism. The key outcome of the review was a compelling case for developing an overarching South Australian Regional Visitor Strategy that would:

- Create alignment between the South Australian Tourism Commissions’ research about visitor needs and regional priorities.
- Consider the five pillars of sustainability (regional marketing, dispersal, infrastructure, product development and industry capability).
- Link to the State Tourism 2020 Plan.
- Foster collaboration across regional boundaries.
- Translate easily into regional strategies.

In June 2016 a South Australian Regional Visitor Strategy Steering Committee began its work. Members included representatives from Regional Development Australia, local government, the South Australian Tourism Industry Council, the chairs of our regional tourism organisations and the South Australian Tourism Commission. Together we led a process of exceptional consultation and collaboration with every region analysing current research, assessing local priorities, tourism products, experiences and business capability. Collectively we evaluated and agreed key opportunities for generating growth, increasing jobs and integrating regional plans into shared strategic priorities. These priorities are the foundation of this first South Australian Regional Visitor Strategy.

Through implementing these priorities we will strengthen regional capacity, improve collaboration within and between regions and create new models of public and private investment and partnership that build sustainability and community vibrancy.

First and foremost, the measures of our success will be increased tourism revenue and visitation through memorable visitor experiences and more tourism-related jobs.

We need to be bold and “seize the day”. There has never been a greater opportunity to build a sustainable future for regional tourism.



A handwritten signature in black ink that reads "H Edwards".

Helen Edwards
Chair, Regional Visitor Strategy Steering Committee

Source: South Australian Tourism Plan 2020

Message from the Minister

Tourism is a super-growth sector and an economic priority for South Australia, with sights set firmly on an \$8 billion visitor economy by 2020.

The State Government is committed to continuing the success of our regions and the visitor economy offers incredible opportunities for growing jobs and sustaining communities across South Australia. As a dynamic sector, tourism is a driver of opportunity for the many areas of our economy which feed into it.

We are also committed to collaboration between all parts of government.

I have the privilege of leading the relevant and linked portfolios of Trade, Tourism and Investment. I will also work closely with my colleagues in agencies like transport, infrastructure and planning to deliver key outcomes of the Regional Visitor Strategy.

I commend the spirit of collaboration between regions and peak agencies like the South Australian Tourism Commission, the Regional Development Australia network, the Local Government Association of South Australia and the South Australian Tourism Industry Council in shaping this Strategy. This is the first time that all our regions have joined forces to consider common needs, action areas and priorities for regional South Australia. I am particularly pleased to note the focus on the important role of local government.

The State Government has moved quickly to address issues raised in the Strategy. As an example, our tourism regions have identified inefficient telecommunications as an impediment to business and a detractor for visitors. The new government is committed to initiatives which will improve the coverage and connectivity within our regions.

I am committed to ensuring that regional funding programs are deployed to drive the Strategy forward, that we reduce the costs of doing business and that the South Australian Tourism Commission is effectively resourced as the central coordinating agency. I look forward to engaging with regional stakeholders about the ways in which we can together actively implement the Strategy.

Our regions have a strong history of contributing to the State's economy and they will play a key role in our future prosperity. They generate 40 per cent of total visitor expenditure while comprising only 23 per cent of the State's population. This Strategy identifies our regions' strengths and puts in place a plan to achieve their true potential.



A handwritten signature in blue ink, appearing to read 'David Ridgway'.

Hon David Ridgway MLC
Minister for Trade, Tourism and Investment

Executive summary

The South Australian Regional Visitor Strategy is a first for the state.

It presents an exciting opportunity for the State's regional tourism. It puts the visitor front and centre. It also focuses attention on the wider economic stakeholders in tourism who form part of what is now commonly called the 'visitor economy'.

The Strategy is a collaborative effort. It has been built from the ground up via extensive consultation with local councils, state government, regional tourism associations, peak bodies and most importantly, tourism operators who interact with visitors every day. The common aim is to align all available resources more effectively. The consumer is at its absolute core. Its recommendations are based on visitor research, consumer insights and the collective experience of regional tourism organisations.

The opportunity

Regional tourism is critical to the State's visitor economy. It generates 13,000 direct and 6,000 indirect tourism regional jobs and \$2.6 billion in visitor expenditure. In fact, by 2020 this has the potential to grow to \$3.55 billion. Although only 23% of South Australians live in regional areas, these areas account for over 40% of the State's total visitor spend.

To reach this 2020 potential, regions have collectively agreed on the following regional priority action areas:

Marketing

Today's customer has turned to digital platforms for trip inspiration, planning, booking and sharing. Better coordinated and targeted digital marketing, aligned with the South Australian Tourism Commission's strategies, is required across all regions. Regions want to shape their marketing to express their brands. They want to promote their regions better by coordinating industry marketing efforts and building the rich content which consumers are hungry for. And they want to build industry's engagement with tourism distribution systems.

Accommodation

Quality and experiential accommodation in remarkable natural environments will help lift regional room rates, occupancy levels and total visitor spend. New rooms are required across regional South Australia, including several projects of scale. A significant number of regional rooms also need refurbishing. These developments in turn will generate jobs in the construction phase and ongoing jobs in the visitor economy.

Experience development

Enhancing existing tourism experiences and creating new offerings which reinforce South Australia's brand strengths are required across all regions. Priorities include food and wine, nature and wildlife, cultural, coastal and aquatic, outback and soft adventure experiences.

Events

Regional South Australia offers a diverse range of festivals and events. They range from food and wine festivals, arts and heritage events, fairs and local markets to business meetings, conferences, sport and recreational events. They are valuable assets that build brand awareness and visitation and create a unique reputation for every region. However, they are resource-intensive and frequently rely heavily on volunteers. A long-term strategic focus is needed at a regional level on strengthening hero events and improving the coordination and resourcing of regions' offerings. This will help to ensure that events continue to be a major drawcard.



Industry capability

One of the most important pillars of this strategy is capability building. Areas of support most needed throughout regional South Australia include digital marketing skills, event management expertise, working with distribution intermediaries, business management skills, customer service and understanding the emerging Chinese visitor market. Government and industry bodies will need to work more closely to drive this effort.

Collaboration

Borderless collaboration is a fundamental theme across this entire strategy. That means working closely with other Australian States, neighbouring South Australian regions (including Adelaide), and all partners within a region. Consumers don't see borders - they just see great experiences. The State's touring routes are a key area for more shared effort. Closer alignment of the State's network of Visitor Information Centres with the strategies of regional tourism organisations is essential. And close collaboration between key State agencies in areas such as infrastructure development and industry support will be crucial. Overall, the aim is to optimise existing financial and human resources already being directed towards the visitor economy.

Visitor infrastructure

Well-maintained visitor infrastructure provides a safe and enjoyable visitor experience and helps operators to grow. Priorities include improvements to key regional

roads and the supply of reliable telecommunications across all areas. Regions have also identified coastal and marine infrastructure, signage, aviation infrastructure and trails as other priorities.

Cost of business

Addressing barriers to developing tourism businesses is a major concern for all regions. Simplifying regulations will enable businesses to diversify or expand and encourage new entrants. Key areas include planning and licensing and product to plate limitations. Regions all report the cost and reliability of power and numerous telecommunications black spots as key issues for industry and visitors.

Region by region focus

This strategy draws together the needs and aspirations of all South Australia's regions. It recognises that each region has specific opportunities and challenges, with the final section outlining South Australia's eleven individual regional response priorities. These summaries provide a concise list of actions, investment priorities and areas of collaboration required to reach each region's visitor growth potential.

Globally tourism is a major economic growth sector. South Australia, with its world-class attributes, is well-placed to capitalise on this growth. This strategy's purpose is to ensure that regions are able to seize the opportunity and share in the growth.


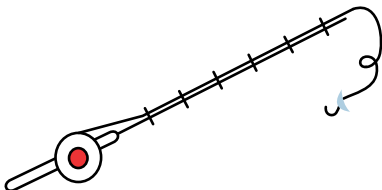
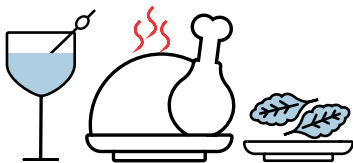
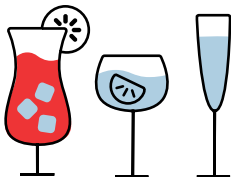
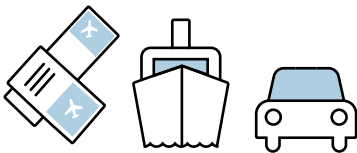
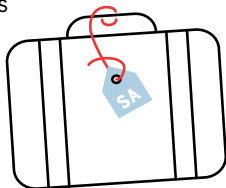
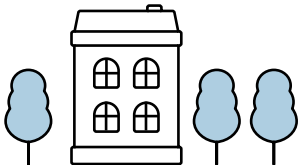
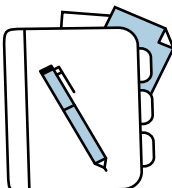

What is the visitor economy?

VISITOR ECONOMY = any money spent by visitors in South Australia

While the term 'visitor economy' is intrinsically linked to tourism, it is much broader. It refers to the money that *any* visitor spends in the state. That includes international, interstate and South Australians travelling within their own state. It covers people visiting on holidays, for business, education purposes or just visiting family and friends.

The visitor economy covers spend beyond just tourism experiences. For example, visitors may get their clothes dry cleaned, buy local wine, or enjoy a local produce-based meal. They may travel by taxi or buy groceries from the local store. The money spent on all these items flows into industries such as beverages, agriculture, transport, and retail. This not only creates more jobs in the tourism industry but other complementary industry sectors as well.

SECTORS OF THE VISITOR ECONOMY - DIRECT TOURISM OUTPUT

Accommodation \$697m 	Other retail trade \$628m 	Dining out \$762m 
Clubs, pubs and bars \$318m 	All transport \$1363m 	Travel agency and tour operator services \$175m 
Dwelling ownership \$427m 	Education and training \$263m 	Other \$289m 

Source: State Tourism Satellite Account 2016/2017 - Direct Tourism Output by Industry

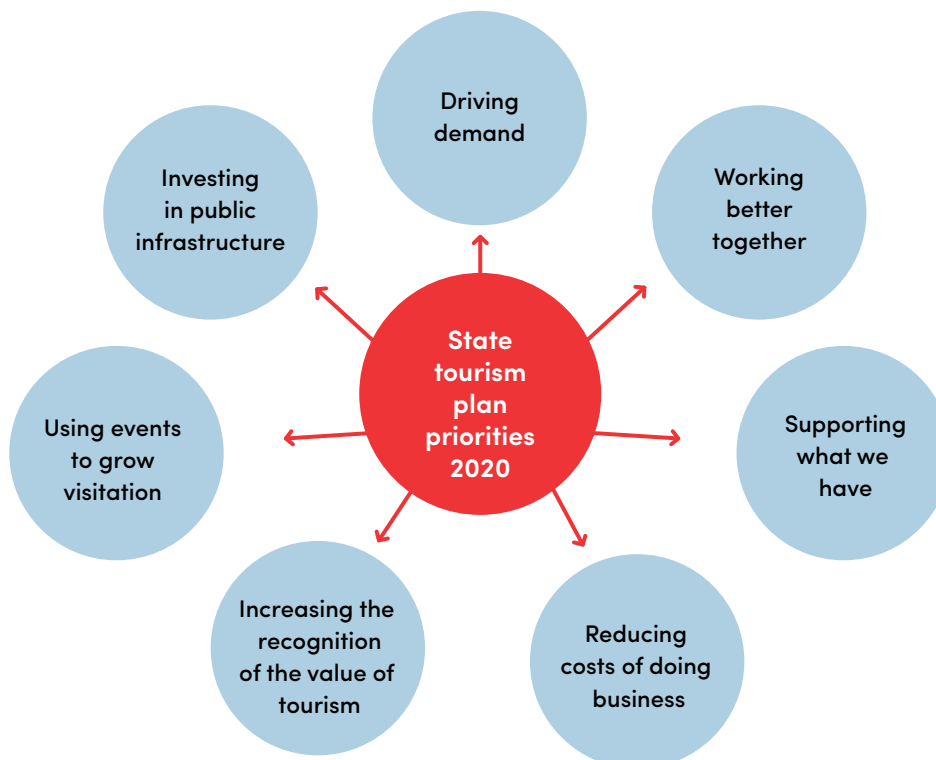
South Australian Tourism Plan 2020

Tourism is considered one of Australia's top 5 super-growth sectors and is a vital contributor to South Australia's economy. It currently delivers \$6.6 billion in visitor expenditure and directly employs more than 36,000 South Australians.

The South Australian tourism sector's growth has outperformed manufacturing, agriculture, healthcare, financial and insurance services over the last decade. Through extensive stakeholder consultation, a state tourism 2020 plan was created to maximise the contribution of this super growth sector. The plan aims to deliver \$8 billion in visitor expenditure to South Australia by 2020. The priority areas for the State Tourism plan are shown in the figure below.

The role that South Australian regions play in delivering this 2020 potential is significant. In fact, 44% of the State's 2020 tourism expenditure is expected to come from regions.

SOUTH AUSTRALIAN TOURISM PLAN 2020 PRIORITIES



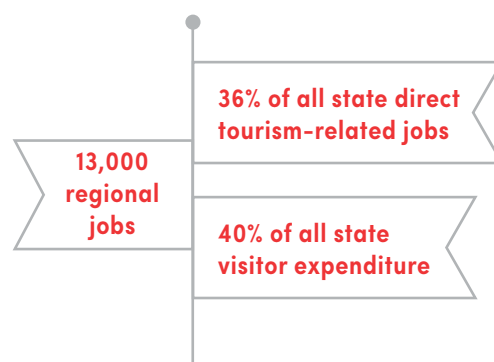
Since 2006, tourism's average annual growth rate has been 4.7% versus the state-wide industry average of 4.2%.

Source: Regional Tourism Satellite Accounts 2015/2016, Tourism Research Australia – National Visitor Survey and International Visitor Survey December 2017

Importance of regional tourism

Regional tourism is a critical part of the South Australian visitor economy delivering:

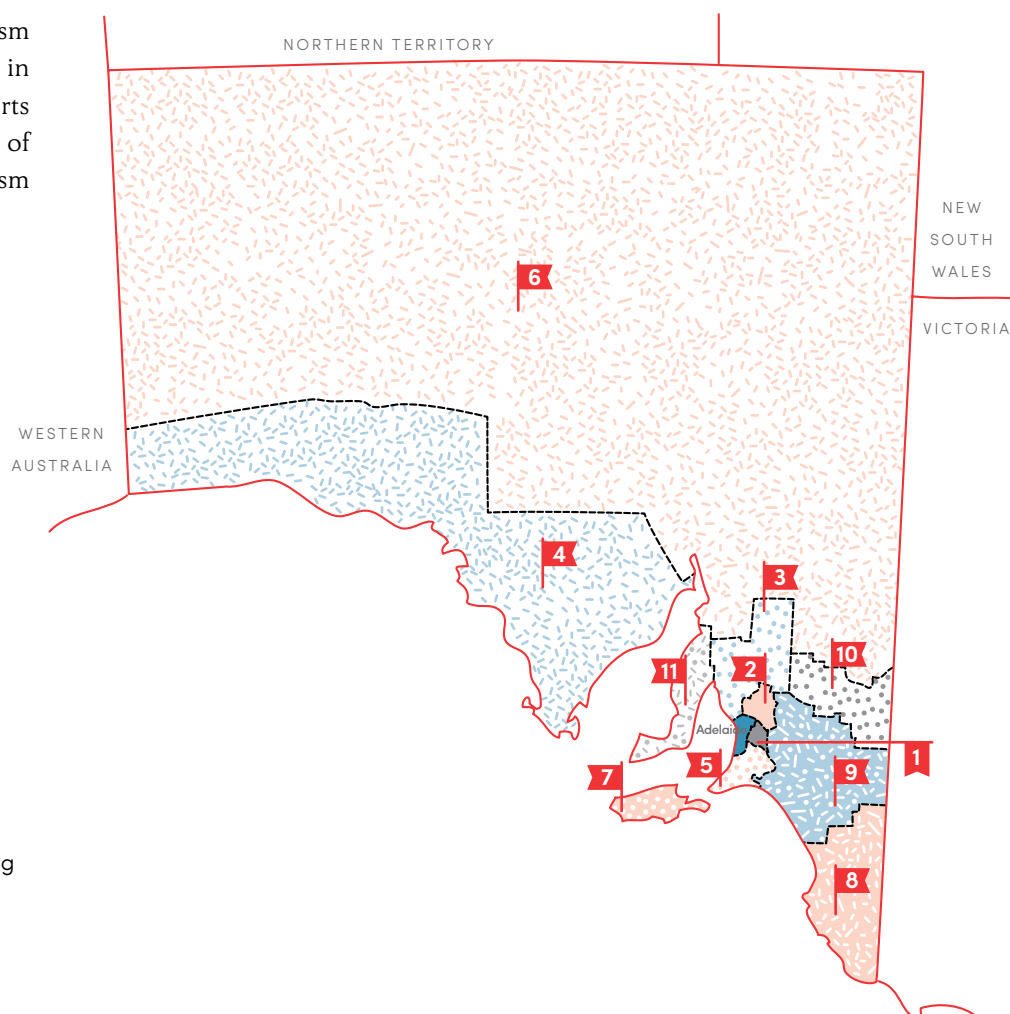
- \$2.6 billion in visitor expenditure
- 40% of all state visitor expenditure
- 13,000 tourism jobs in regions
- 36% of all state direct tourism-related jobs
- 44% of all state visitor expenditure by 2020 (\$3.55 billion)



The state's regional tourism organisations play a key role in coordinating regional efforts and leveraging the activities of the South Australian Tourism Commission.

SOUTH AUSTRALIA BY REGION

- 1 Adelaide Hills
- 2 Barossa
- 3 Clare Valley
- 4 Eyre Peninsula
- 5 Fleurieu Peninsula
- 6 Flinders Ranges and Outback
- 7 Kangaroo Island
- 8 Limestone Coast
- 9 Murray River, Lakes and Coorong
- 10 Riverland
- 11 Yorke Peninsula



Source: South Australian Tourism Plan 2020, Regional Tourism Satellite Accounts 2015/2016, Tourism Research Australia – National Visitor Survey and International Visitor Survey December 2017

Regional visitor snapshot

HOW VISITORS ARRIVE IN REGIONS



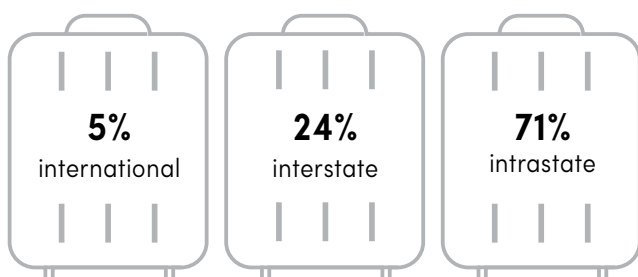
87% self-drive

The remaining visitors arrive in regions by air, train, bus or tour vehicle.

PURPOSE OF REGIONAL VISIT – OVERNIGHT VISITORS

- 52% holiday
- 28% visiting friends or relatives
- 16% business
- 6% education and other

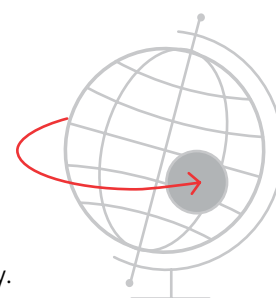
REGIONAL VISITOR EXPENDITURE



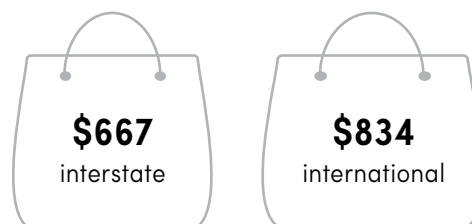
TOP 5 INTERNATIONAL VISITOR SPENDS IN REGIONS

- 1 UK
- 2 USA
- 3 Germany
- 4 New Zealand
- 5 France

China is 7th but growing rapidly.



AVERAGE VISITOR SPEND IN REGIONS



AVERAGE LENGTH OF STAY IN REGIONS

- 5 days for interstate visitors
- 12 days for international visitors

INTERSTATE OVERNIGHT VISITORS IN REGIONS

- 49% are from Victoria
- 25% are from New South Wales

Stakeholders

This strategy has been built on extensive stakeholder consultation with all key stakeholders involved in South Australia's regional visitor economy.

There are a range of stakeholders required to grow South Australia's regional visitor economy and deliver the recommendations contained in this strategy. Each stakeholder plays a valuable role in contributing resources and expertise towards these shared goals. They include:

- Private sector (tourism and non-tourism)
- Local Government Association of South Australia
- Regional councils
- Regional tourism organisations
- Regional Development Australia
- South Australian Tourism Industry Council
- State/Federal government agencies
- Government departments with key roles in the visitor economy (e.g. Department for Environment and Water and Primary Industries and Regions SA)
- South Australian Tourism Commission
- Tourism Australia
- Tourism and business associations

There are also stakeholders external to the regions which have a partnership role to play such as airlines, airports and Adelaide-based operators.



Regional Development
SOUTH AUSTRALIA

Strategic pillars

Marketing

The South Australian Tourism Commission provides the largest regional marketing engine for the State. Combined with the marketing efforts of 5,000 regional tourism operators, this creates an opportunity for greater marketing impact. Regional tourism organisations will play a crucial role in harnessing this collective effort.

Regional marketing priorities

1. Attract the right visit mix

International, interstate and intrastate visitors all have a role to play in growing regional visitor economies. From an intrastate perspective, Adelaide's 1.3 million residents represent a significant pool of potential visitors. The city also plays a critical role as a visitor access point to the State. Consumer research shows that appeal for South Australia is strongest when both regions and Adelaide are part of an itinerary.

2. Utilise the right marketing channels

Digital

Embracing digital marketing channels is a priority for all regions. Customers continue to grow their use of digital devices for destination inspiration, selection, planning, booking and experience sharing. Social media advocacy can have a significant impact on a region and an operator's business and help drive repeat visitation. Aligning the digital efforts of regional tourism organisations and operators with the South Australian Tourism Commission's strategy will drive greater impact for all.

Partner Platforms

Another high impact channel to leverage more for regional marketing is partner platforms. Key partners include South Australian Tourism Commission, Tourism Australia, Adelaide Convention Bureau and StudyAdelaide.

South Australian Tourism Commission's domestic and international marketing strategy is heavily geared towards digital and provides significant lead generation opportunities for regions and operators. Free operator and regional event listings on the Australian Tourism Data Warehouse (ATDW), enable partners to extract this information and use it on their own sites.

Familiarisations

Familiarisations, that is, bringing people to experience the destination first hand, continues to be a powerful channel for media, trade and key influencer marketing and promotion. The return on investment is often significant.

3. Champion hero regional experiences

There are many outstanding regional visitor experiences on offer in South Australia. These can be operator experiences, wildlife or nature experiences, local festivals or events. Based on customer insight and appeal, using a hero experience as a marketing hook can drive consumer interest and conversion for an entire region. Once a visitor has decided to visit, bundling experiences together can encourage visitors to stay longer and spend significantly more.

4. Role of messaging

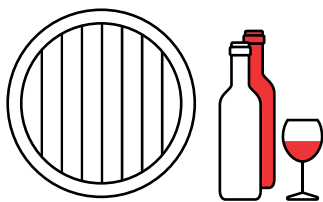
South Australian regions offer the following appealing and accessible visitor experiences: credible wine regions, distinctive dining, fresh local produce, wildlife, coastal, unique festivals and events, and art and culture including Aboriginal experiences.

Source: ABS Census 2016

Consumer testing by the South Australian Tourism Commission has identified six brand pillars that the State's regions could be famous for:

Wine experiences

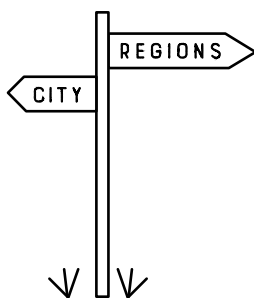
With over 18 wine regions in the state, visitors can meet winemakers, walk through vineyards, learn about wine production and sample South Australia's finest.



1

Boutique accessibility

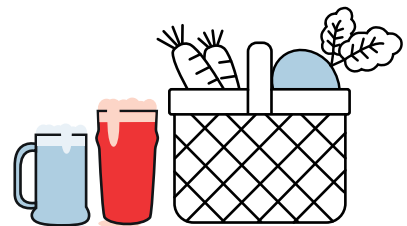
Incredible experiences on the doorstep of a major capital city.



2

Progressive destination dining

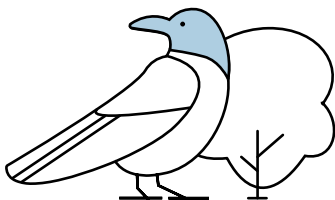
Eating fresh local produce in amazing natural locations. Connecting visitors with the source of the food and beverages they are enjoying.



3

Wildlife in the wild

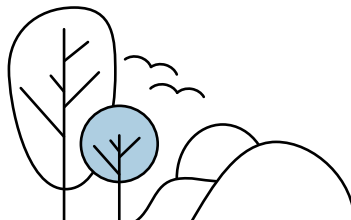
Experience wildlife up close. Observe koalas, kangaroos, echidnas and native birds in their natural habitat. Swim with sea lions, tuna or even cage dive with sharks.



4

Open space and naturalness

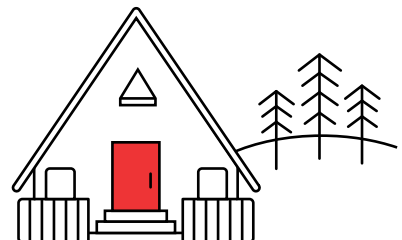
Memorable experiences for everyone in an untouched, easily accessible and uncrowded natural environment.



5

Unique accommodation

Quality accommodation done differently. Unique designs in remarkable natural settings create a reason to visit.



6

Collaboration

This regional visitor strategy was created from a strong desire by all stakeholders to align priorities and increase the impact of resources within the South Australian regional visitor economy.

The theme of *Borderless Collaboration* underpins this strategy and means working closely with:

- The five states that connect to South Australian regions
- Neighbouring South Australian regions
- Relevant federal and South Australian government organisations and departments
- All local councils within a region or in a neighbouring region
- Neighbouring regional tourism organisations and peak bodies
- The City of Adelaide.

Regional collaboration priorities

1 Touring Routes

Given 87% of visitors to regions are self-drive, the South Australian Tourism Commission has developed six highly appealing and popular touring routes:

- The Coastal Way - Yorke Peninsula
- The Epicurean Way - Adelaide Hills, Barossa, Clare Valley and Fleurieu Peninsula
- The Explorers Way - Clare Valley and Flinders Ranges and Outback South Australia

- The Mighty Murray Way - Murray River, Lakes and Coorong, Riverland and Fleurieu Peninsula
- The Seafood Frontier - Eyre Peninsula
- The Southern Ocean Drive - Limestone Coast, Murray River, Lakes and Coorong, Fleurieu Peninsula and Kangaroo Island.

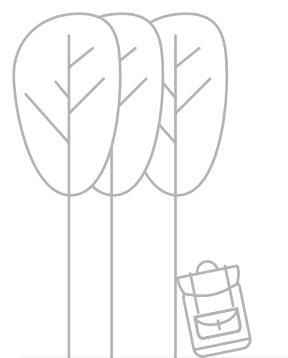
These journeys across regional South Australia provide the perfect vehicle for collaborative marketing efforts including cross promotion of regions, operators, and experience bundling. These touring routes also provide an impetus for improving self-drive visitor infrastructure.

2 Visitor Information Services

The traditional model of delivering visitor information is evolving to increase visitor satisfaction, dispersal, length of stay and spend. The new approach utilises valued face-to-face communication and digital channels to meet the needs of visitors when and where they seek it.

3 Regional Festivals and Events

A consistent theme throughout this strategy is the need to foster a sustainable regional event program. This requires collaboration and sharing of expertise amongst local councils, volunteers, and other key event organisers.



South Australia's six key regional touring routes provide an ideal opportunity for collaboration.

Source: Tourism Research Australia - National Visitor Survey and International Visitor Survey December 2017

Accommodation

As competition across Australian regions intensifies, visitors are demanding more from their accommodation. Quality and experiential accommodation that embodies the best of the local environment is now a catalyst for destination selection.

The benefits of improved accommodation

- Quality accommodation drives guest satisfaction and repeat visitation.
- Overnight stays deliver significantly more revenue than day trips and a broader positive impact including increased employment.
- Several regions will benefit from projects of scale which help lift regional room rates, occupancy levels and total visitor spend.

Regional accommodation priorities

An extensive regional audit of accommodation requirements conducted as part of the South Australian Tourism Plan 2020 revealed:

- The standard of tourism accommodation in regional South Australia is lagging behind other States.
- A shortage of accommodation, especially of scale, can inhibit regional tourism development in some locations.
- New regional rooms are still required across the state.
- A large number of regional rooms require an upgrade from three to four stars by 2020.

- More unique and experiential accommodation is needed in regions.
- Caravan parks are in a phase of growth and renewal.
- Revenue per available room and occupancy rates are low for some regions, particularly during winter.

Support required

- Encourage experiential accommodation development linked to an appealing landscape or activity: glamping, caravan parks, houseboats, golfing and other nature-based tourism such as hiking and cycling.
- Utilise marketing and events to drive increased overnight visitor stays and lift occupancies and room rates.
- Work with the caravan parks and the camping sector to continue to build the quality and appeal of their accommodation.
- Assist operators to develop strong business cases for investment in new developments and enhancements.

Experience development

The opportunity in regional South Australia is to combine stunning natural assets with creatively designed new and enhanced experiences. These should reflect a region's identity and brand positioning.

Regional experience development priorities

1 Food and beverage

Immersive local food and beverage experiences that further entrench the State's leadership position in this space are required.

2 Nature-based

Consumers are continuing to seek out more nature-based experiences for ongoing physical and mental wellbeing.

3 Experience bundling

Experience bundling helps to entice visitors and let them understand what's on offer in a region and encourage them to stay longer. Working with nearby tourism operators that offer complementary products is a way for regions to meet this visitor need.

Emerging or niche experience development priorities

1 Chinese visitor experiences

Creating products that appeal to the growing Chinese visitor market presents an opportunity for certain regions, especially those closest to Adelaide and on the Melbourne to Adelaide touring route.

2 Cruise visitor experiences

There is a need for more on-shore excursions for cruise visitors that can be pre-booked by intermediaries and cruise operators. While the cruise sector is still only a relatively small portion of all visitors to the State, it is forecast to grow 26% in the next 12 months alone.

3 Aboriginal experiences

Creating authentic Aboriginal tourism experiences provides a way of storytelling and connecting to Aboriginal history, culture and the natural environment. Fostering and supporting these experiences continues to be a significant regional tourism development priority.

Support required

- Share consumer research on appealing experiences for different visitor groups with all stakeholders.
- Focus on enhancing existing and creating new hero experiences.
- Support access to capital, government grants and investment for new product development.
- Foster peer-to-peer networking, mentoring and sharing case studies of success.
- Champion businesses which are developing or refreshing their visitor experiences.

Source: Tourism Research Australia – Tourism Businesses in Australia, June 2012 – June 2016

Events

Events play an essential role in the South Australian regional visitor economy. They are a great way to showcase the personality of a region and build community pride and social connections.

The benefits of events

For visitors specifically, regional events can:

- provide a compelling reason to visit and importantly to return
- encourage overnight stays
- drive increased spend
- drive significant intrastate visitation.

Events South Australia provides funding support to a range of regional and community events. Local councils also provide substantial funding and other support.

Regional event priorities

Regions have identified the following key event priorities:

1 Create or grow existing ‘hero’ regional events

Hero events are those events that successfully showcase and celebrate a region’s uniqueness. An example is the Barossa Vintage Festival. Regular strategic event planning will help identify and grow hero regional events.

2 Strengthening collaboration

Running successful events can be resource-intensive. Regions believe there is an opportunity for greater collaboration between event organisers, especially local councils, to share knowledge and expertise.

A whole-of-region collaborative approach will deliver a higher return on investment for all.

3 Building event capability

Regional events rely on passionate volunteers to make them a success. It is important to start broadening the appeal of event volunteering to a younger demographic.

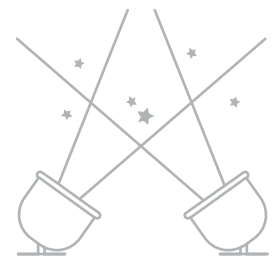
Regions also believe that providing existing event organisers with best-practice event management tools will help to raise regional event capability.

4 Create and promote a region’s annual event calendar

A calendar of events anchored around a hero event/s can drive year-round visitation, particularly during quieter months. This strategy aims to encourage all event organisers to list their regional events for free on the Australian Tourism Data Warehouse. Partners can then extract the information quickly for promotional purposes.

5 Attract more business events

Some regions are well placed to attract more business events including meetings, incentives and conferences.



There are several thousand regional events and festivals run throughout South Australia every year.

Industry capability

Championing industry capacity building helps grow both operator revenue and the wider visitor economy. Lifting the digital marketing capability of tourism operators is the top priority.

Regional capability priorities

1 Digital capability

This was the greatest area of need identified by regions. Specifically, learning how to create engaging websites, digital communication, drive leads and social media advocacy.

2 Event management

All regions require training and support related to running visitor events. Workshops, toolkits, and best practice event management systems are required.

3 Understanding third-party distribution intermediaries

Understanding pricing structures and commissions for third-party distribution channels such as travel agents, wholesalers, online travel agents (OTA's) and inbound tour operators (ITO's) is a training need for many regional operators.

4 Business management

General business management skills were another area identified for skills training. Identifying, promoting and connecting with existing organisations offering such training is recommended.

5 Customer service

Some operators in regions are new to the service industry, and customer service training is the first requirement. Additional training covering international visitor service expectations is also needed.

6 China visitor market

With a 32% increase in Chinese visitors to South Australia in the last year, operators require experience development, marketing and customer service training for this niche but growing market. An audit of each regions China readiness and appeal highlighted that those regions closer to Adelaide or on the Melbourne to Adelaide touring route have the greatest potential to attract this visitor. What is important is not only attracting this new visitor group but ensuring Chinese visitors spend in the region during their stay.

Who can help?

Raising the capability of the sector is a shared responsibility, with each stakeholder contributing in their area of expertise. The opportunity is there for key industry support agencies to work more closely together in identifying and addressing these needs. They include the South Australian Tourism Industry Council, Regional Development Australia boards, regional tourism organisations, the South Australian Tourism Commission and local councils. Harnessing informal regional and operator networks is also essential for fostering peer-to-peer mentoring and support.

Source: Tourism Research Australia International Visitor Survey – December 2017

Cost of doing business

Working with all levels of federal, state and local government to reduce or simplify regulatory processes would have a significant impact on growing regional visitor economies.

Tourism operators are often impeded by complex regulatory and legislative constraints. This can limit new tourism start-ups as well as existing operator expansion plans.

Some of the critical regulatory and legislative issues constraining regional visitor growth and innovation are:

- Complex business and event start-up requirements
- Restrictive liquor licensing regulations
- Visa constraints and costs related to attracting and retaining staff
- Planning issues related to the Mount Lofty Ranges
- Watershed and the 1956 River Murray Flood Line
- Licensing conflicts with “paddock to plate” services
- Regions commonly identify the price and reliability of power as a hindrance to business.



Visitor infrastructure

Adequate and well-maintained infrastructure is critical for the sustainable growth of regions and a safe and enjoyable visitor experience. Improving and maintaining infrastructure can open up new possibilities and remove barriers to growth.

Regional infrastructure priorities

1 Roads

Roads play a hugely important role in enabling the dispersal of visitors safely to all corners of the State. Improving the self-drive visitor experience is required via:

- Sealing specific routes (e.g. the Strzelecki track) and upgrading some unsealed roads. This will allow regions to attract new visitor markets.
- Road widening, shoulder sealing, passing lanes and fixing bottlenecks on popular regional routes (in particular Port Wakefield).
- Road-related infrastructure including new or enhanced parking bays and pull-out areas.

2 Air access

Regular passenger aviation

Visitors are often time poor, so growing affordable regional aviation options will aid visitor dispersal rates. The focus is to maintain existing flights and foster discussions between airports and airlines to increase flights where demand can be justified.

Touring aviation

Touring aviation includes activities such as sightseeing experiences, charter flights, touring products and self-fly access to regions. Some of these activities operate on privately owned unsealed airstrips. Infrastructure requirements include improving regional runways, landing strips, fuel availability, lighting and fencing.

3 Signage

Updating, repairing and extending visitor-related signage is a priority across all regions, particularly on major touring routes. Specifically:

- Directional signage
- Signage welcoming visitors to a region or town
- Interpretive and information signage for regional points of interest.



With 87% of all visitors driving to regional South Australian destinations, safe roads are a vital part of visitor infrastructure.



4 Telecommunication black spots

For destinations, wi-fi attracts visitors to stop in their town and spend time and additional dollars. It also allows visitors to enhance their trip experience via online mapping, recommendations and immediate social media advocacy. Ensuring reliable wi-fi availability in popular tourism towns, service centres, highly-visited sites, attractions and on regional touring routes is a priority. Addressing wi-fi and telephony black spots is critical as this impacts on both the visitor and tourism operators.

5 Coastal and marine infrastructure

Most South Australian regions rely on water as a critical asset and attractor. Water-related infrastructure such as jetties, wharves, boat ramps and navigation aids are crucial to activating tourism experiences. Regions strongly support ongoing maintenance but local councils often find this a challenge.

6 Trails

The upgrade, maintenance, and development of new hiking and cycling paths throughout the regions, including in National Parks, are required to support ongoing growth in popular nature-based tourism experiences.



Nature based tourism is worth \$1.3 billion to the South Australian visitor economy.

Specific visitor infrastructure priorities are shown in each region's individual section ✓

Source: Tourism Research Australia – National and International Visitor Survey December 2017

Regional response priorities

Each region has a selection of experiences which reflect the strengths and priorities of that region.



International visitors



Domestic visitors



Family



Beach / coastal



Cycling



Food, wine and beverages



Camping



Nature / wildlife



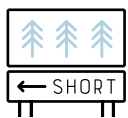
Aquatic adventures



Fishing



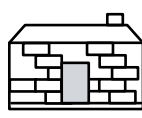
Local produce



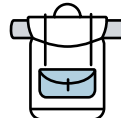
Short drive
(close to Adelaide)



Long drive
(touring route)



Historic



Hiking



Water experiences



Regional airport



Regional transport



Caravanning

Adelaide Hills



VISITOR SPEND

\$163 million

EMPLOYMENT IN REGION

1300 direct + 500 indirect =

1800 jobs

1 in 17 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	1,206,000	\$86m
Overnight	186,000	\$77m
OVERNIGHT SPLIT		
International	7,000	\$7m
Interstate	77,000	\$32m
Intrastate	101,000	\$37m

OCCUPANCY AND RATES

	ADELAIDE HILLS	REGIONAL AVERAGE
Occupancy	58%	51%
RevPAR (average yield of a hotel room)	\$96	\$79

744 tourism businesses

159 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Adelaide Hills priorities

Adelaide Hills' priority is to capitalise on its proximity to Adelaide through collaboration and partnerships. The region aims to convert more visitors to stay overnight and increase visitor spend. Adelaide Hills will leverage its reputation for fulfilling on visitor expectations to drive a thriving and sustainable region.

Marketing

- Capitalise on the region's proximity to Adelaide to drive increased day trips, repeat visitation and overnight stays.
- Create compelling communications targeted at the visiting friends and relatives market and their local hosts. This has a dual benefit of increased visitation and fostering local community tourism advocates.
- Better align Adelaide Hills and South Australian Tourism Commission's digital marketing efforts for greater impact and leads to local tourism operators and partners.
- Leverage Adelaide Hills marketing with that of StudyAdelaide to encourage students, their families and their friends to visit.
- Grow mid-week visitors to the region via the convention sector (business events and the incentive market).
- Boost the promotion of the region's accessible nature and wildlife offering to international visitors particularly the growing Chinese market.

Events

- Work with the Adelaide Hills Wine Region Association to refresh existing event strategies for "Crush Festival" and "Winter Reds Weekend" with a focus on innovation, resourcing and growth.

- Optimise local investment in and promotion of cross regional events such as Tour Down Under.

Collaboration

- Collaborate and leverage State tourism, business and event organisations to ensure a cohesive approach to promotion and visitor attraction.
- Encourage partnerships between local tourism operators via joint familiarisations, cross-promotion and bundling of commissionable visitor experiences.
- Improve the experience (signage, wi-fi access) and promotion of the Epicurean Way touring route.
- Support Adelaide Hills Visitor Information Centre and information outlets to meet changing visitor needs. Implement the hub and spoke model of the Visitor Information Services strategy.
- Support cross-regional crisis management plans for natural disasters to minimise risks for tourism operators and visitors.
- Collaborate with cruise operators to attract cruise visitors to the region.



Just a 20-minute drive from Adelaide and over 50 cellar doors to choose from.



Accommodation

- Advocate for the development of 41 new rooms and 25 room upgrades (from 3 to 4-star) by 2020.
- Encourage development of a new 5-star property around Hahndorf and accommodation linked to adventure trails, nature, wildlife and wellness.

Experience development

- Support the development of operator-led experiences that reflect the Adelaide Hills Interpretation Plan themes (food, wine, craft beer, spirits and cider, towns and villages, art and culture, nature and wildlife, accommodation, lifestyle and wellbeing).

Industry capability

- Raise industry capability in international marketing and distribution (especially China), digital marketing, accessible tourism, customer service, experience development and business cases for grants and investment.

Visitor Infrastructure

- Address parking issues in Hahndorf.
- Address infrastructure requirements in newer tourism areas such as Uraidla and Lenswood.
- Improve regional Wi-Fi and telephony connectivity.
- Influence investment in Cleland Wildlife Park and The Cedars.



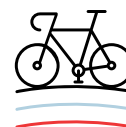
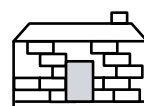
The Crush and Winter Reds festivals collectively attract over 30,000 visitors each year to the region.

PARTNERS



Adelaide Hills Tourism, Adelaide Hills Council, Mount Barker District Council, Regional Development Australia, Stirling Business Association, Hahndorf Business and Tourism Association, Business Mount Barker, the Adelaide Hills Wine Region Association and the South Australian Tourism Commission.

Barossa



VISITOR SPEND

\$190 million

EMPLOYMENT IN REGION

500 direct + 300 indirect =
800 jobs

1 in 32 jobs
supported by the
tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	828,000	\$82m
Overnight	209,000	\$108m
OVERNIGHT SPLIT		
International	12,000	\$13m
Interstate	73,000	\$48m
Intrastate	124,000	\$47m

OCCUPANCY AND RATES

	BAROSSA	REGIONAL AVERAGE
Occupancy	59%	51%
RevPAR (average yield of a hotel room)	\$105	\$79

372 tourism businesses

283 businesses listed on Australian
Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Barossa priorities

The main priority for driving future growth to the Barossa is to increase overnight visitation from interstate and overseas markets. While the region receives four day-trip visitors for every overnight visitor, overnight visitors deliver over two thirds of total spend. Accommodation improvements and developments will be crucial.

Marketing

- Leverage the Barossa's strong brand position as a global wine destination and grow messaging around provenance dining, art and history.
- Increase international, interstate and business event overnight visitors to fill mid-week occupancy and drive visitor spends.
- Increase marketing efforts towards key international visitor markets.
- Leverage established global marketing platforms such as Ultimate Winery Experiences and Great Wine Capitals of the World for promoting the region.
- Promote and grow the region's offering to cruise visitors.

Events

- Work towards the Barossa becoming Australia's premium regional events destination, based on quality events and accessibility from Adelaide.
- Build on the region's two largest food and wine festivals (Barossa Vintage Festival and Barossa Gourmet Weekend) to grow length of stay and visitor spend.
- Work with the Adelaide Convention Bureau to build the funding, resources and capabilities of Tourism Barossa to attract major business events to the region.

Collaboration

- Leverage the Epicurean Way touring route as a cross-regional marketing platform to attract self-drive food and wine travellers.
- Support consumer-facing Visitor Information Centre network services to meet changing visitor needs.
- Continue collaboration with the state's key tourism, business and event organisations to ensure a cohesive approach to promotion and visitor attraction.



The Barossa Vintage Festival is South Australia's largest regional festival attracting attendances of 55,000 each year. It has been running for 71 years.



Accommodation

- As a boutique region with strong accommodation yields and high weekend occupancy, there is opportunity to expand the region's offering.
- Foster the development of an iconic 4 to 5-star accommodation product of scale that could meet unmet demand during major events and for conferences.
- Aim to develop 241 new and 27 upgraded rooms (from 3 to 4-star) by 2020.

Experience development

- Increase the number and breadth of Barossa commissionable tourism experiences available via key distribution channels.

Industry capability

- Increase the industry's capabilities related to international marketing and distribution.

Visitor infrastructure

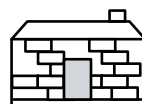
- Improve visitor wayfaring including signage to and around the Barossa.

PARTNERS



Tourism Barossa Inc, The Barossa Council, Light Regional Council, Regional Development Australia Barossa Gawler Light Adelaide Plains, Barossa Grape and Wine Association, Barossa Food and the South Australian Tourism Commission.

Clare Valley



VISITOR SPEND

\$93 million

EMPLOYMENT IN REGION

400 direct + 200 indirect =

600 jobs

1 in 16 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	326,000	\$35 million
Overnight	175,000	\$57 million
OVERNIGHT SPLIT		
International	4,000	\$3million
Interstate	66,000	\$19million
Intrastate	105,000	\$36million

OCCUPANCY AND RATES

	CLARE VALLEY	REGIONAL AVERAGE
Occupancy	65%	51%
RevPAR (average yield of a hotel room)	\$84	\$79

194 tourism businesses

120 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Clare Valley priorities

The focus for the Clare Valley is to encourage high spending international and interstate visitors to stay overnight in the region. Developing new and commissionable nature-based, heritage and epicurean visitor experiences and additional quality accommodation will be key.

Marketing

- Market the Clare Valley to those international and interstate visitors seeking either an active or indulgent holiday.
- Position the region as authentically Australian: offering epicurean, nature-based, outback and heritage experiences.
- Ensure Clare Valley's Breathe It In messaging is across all communication.
- Grow the region's marketing impact and leads to operators by aligning with South Australia Tourism Commission's digital and other strategies.

Events

- Use new flagship events to drive in-region dispersal.
- Continue to support events which showcase the region's local produce story and encourage longer visitor stays and spend.
- Focus on value not volume for key events.
- Encourage conferences and weddings to choose Clare Valley.

Collaboration

- Foster strong linkages between local councils and tourism associations.
- Continue to leverage the Explorers and Epicurean Way touring routes as marketing platforms for the region and grow stopovers to Clare Valley from those heading to and from the Flinders Ranges and Outback.
- Strengthen the region's capacity to meet visitor information needs where and when they seek it.
- Continue to embrace and evolve regional Visitor Information Centres in Clare and Burra.
- Build stronger connections with neighbouring regions such as Yorke Peninsula and Flinders Ranges.

Industry capability

- Raise industry capability in digital marketing, customer service, event management, event promotion and commissionable products.
- Explore ways to retain quality staff in the regions (especially chefs and front-of-house staff).



Conceived around winemaker Jane Mitchell's kitchen table, Clare Valley's Gourmet Weekend was the first event of its kind in Australia. It's now in its 34th year and attracts over 15,000 visitors to the region each year.



Accommodation

- Aim to develop 51 new and 7 upgraded rooms (from 3 to 4-star) in the region by 2020.
- Encourage the development of a boutique 6-star offering.
- Investigate the opportunity to provide farm/vineyard stays in the region.

Experience development

- Increase the number of commissionable visitor experiences in the region.
- Use the region's excellent network of trails for the development of new soft adventure, wellness and complementary tourism experiences.
- Develop more food and wine visitor experiences.

Visitor infrastructure

- Significantly improve telecommunications.
- Improve the ongoing maintenance of key heritage assets.
- Make nature-based assets more accessible via the provision of amenities and signage.
- Connect the Riesling, Rattler and other regional trails.
- Seal the Clare Valley Aerodrome.



Clare Valley has the highest average annual occupancy rate of all South Australian regions.

PARTNERS



Regional Development Australia Yorke and Mid North, Clare and Gilbert Valleys Council, Regional Council of Goyder, Clare Valley Winemakers Inc, Clare Valley Cuisine, Visual and Performing Arts (Mid North), Clare Valley Wine Grape Growers Association and Clare Valley Business and Tourism Association and the South Australian Tourism Commission.



Eyre Peninsula



VISITOR SPEND

\$263million

EMPLOYMENT IN REGION

1500 indirect + 500 direct

2000 jobs

1 in 16 jobs

supported by the tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	373,000	\$56m
Overnight	420,000	\$207m
OVERNIGHT SPLIT		
International	19,000	\$9m
Interstate	112,000	\$73m
Intrastate	289,000	\$125m

OCCUPANCY AND RATES

	EYRE PENINSULA	REGIONAL AVERAGE
Occupancy	50%	51%
RevPAR (average yield of a hotel room)	\$59	\$79

584 tourism businesses

194 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Eyre Peninsula priorities

The opportunity for the Eyre Peninsula is to capitalise on its pristine nature, immersive wildlife experiences and coastal lifestyle, to drive increased overnight stays from international and domestic visitors. A whole of tourism approach is needed across marketing, events, product development, council collaboration and investment.

Marketing

- Increase promotion of the region's competitive strengths (immersive wildlife experiences, pristine nature and fresh seafood).
- Promote unique seasonal wildlife and nature occurrences.
- Capitalise on the region's appeal and growth potential from international markets including China.
- Promote and grow cruise visitation and onshore regional spend.
- Improve the region's digital presence and align this with South Australia Tourism Commission's digital strategy.

Events

- Events can attract new visitors, increase length of stay and visitor spend.
- Create a regional event strategy reflective of the region's Seafood Frontier brand. Grow existing signature events such as Tunarama, and create new events.
- Build regional event resourcing to support this event strategy.

Collaboration

- Develop the region's network of visitor information services to meet changing consumer behaviour. Embrace new technologies and encourage increased visitor dispersal and spend.
- Build on existing collateral and partnerships to drive dispersal to inland and outback Eyre Peninsula.
- Increase flows along the Seafood Frontier touring route and foster dispersal from the route to other parts of the region.
- Work with aviation partners to improve access to the region for corporate, business and leisure travellers.



The Tunarama festival is in its 58th year and attracts over 15,000 people.



Industry capability

- Raise industry capability in the areas of digital marketing, business operations, event management and event promotion.
- Support Aboriginal tourism operators across all areas for business growth.

Accommodation

- Build the region's accommodation yields by aiming to develop 117 new rooms and upgrade 141 rooms (from 3 to 4-star) by 2020.
- Encourage development of an outstanding 5 or 6-star accommodation in a national park or iconic natural location.
- Support improvements to motels in smaller locations.

Experience development

- Create compelling new visitor experiences across coastal, wildlife, seafood and soft adventure areas.
- Embrace the Seafood Frontier brand for those experiences related to coastal Eyre Peninsula.
- Increase commissionable products for sale via travel intermediaries that help build the region's profile domestically and internationally.

Visitor infrastructure

- Maintain and enhance key coastal infrastructure and national parks. The region has approximately 100 State, National and Conservation Parks, 10 State Marine Parks, and 3 Commonwealth Marine Reserves.
- Invest in infrastructure that supports the drive market and encourages overnight stays.
- Address reliability of water and energy supply for regional tourism related businesses.

Ⓐ The Seafood Frontier touring route provides an ideal way for visitors to explore the regions aquatic wildlife experiences, amazing coastline and sample fresh seafood. This route has significant growth potential to attract more visitors to the region.

PARTNERS



The key stakeholders are Regional Development Australia Whyalla and Eyre Peninsula, the Eyre Peninsula Local Government Association and its member councils and the South Australian Tourism Commission.

Fleurieu Peninsula



VISITOR SPEND

\$437 million

EMPLOYMENT IN REGION

1800 direct + 1200 indirect

3000 jobs

1 in 8 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	2,518,000	\$182m
Overnight	730,000	\$255m
OVERNIGHT SPLIT		
International	23,000	\$14m
Interstate	138,000	\$71m
Intrastate	569,000	\$169m

OCCUPANCY AND RATES

	FLEURIEU PENINSULA	REGIONAL AVERAGE
Occupancy	50%	51%
RevPAR (average yield of a hotel room)	\$65	\$79

841 tourism businesses

450 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Fleurieu Peninsula priorities

The key priorities for the Fleurieu Peninsula are to encourage year-round visitation and drive visitor yield. The aim is to grow spend from day-trippers as well as convert some day-trips into overnight stays. Levers include events, accommodation improvements, product development and marketing.

Marketing

- Build awareness in key target markets that the Fleurieu Peninsula is only 45 minutes from Adelaide and its Mediterranean-like climate makes it an ideal all-year, all-week and inclusive visitor destination.
- Showcase the region's multiple touring routes, premium food and wine offerings, arts and cultural events and nature and adventure experiences, many of them unique to the region.
- Align the region's digital marketing efforts with South Australian Tourism Commission's digital strategy and increase operator leads.
- Focus on delivering premium digital content that can also be fed into Tourism Australia's platforms.

Events

- The region currently offers a rich but fragmented events program. Increase bundling and cross-promotion of events occurring around the same time.
- Support events which foster either discovery, repeat visitation or overnight stays, including but not limited to events such as Handpicked, the Fleurieu Film Festival and the Fleurieu Fringe.

Collaboration

- Work with iconic products such as the d'Arenberg Cube and Oceanic Victor to attract domestic and international travellers to the region.
- Collaborate with other regions and experiences on established touring routes (Epicurean Way, Southern Ocean Drive and Mighty Murray Way) for cross promotion.
- Build on the collaboration between Fleurieu Peninsula Tourism and the region's critical Visitor Information Centres. Advocate for Visitor Information Centres to embrace technology and a customer centric model.
- Secure inclusion of a Fleurieu Peninsula experience into Tourism Australia's Signature Experiences program.



The Fleurieu Peninsula is ranked 2nd highest in terms of total number of direct tourism jobs of any region in the State.



Industry capability

- Grow industry capability in digital marketing and cross-cultural customer service skills.
- Mentor and support operators to increase market share in international markets, including but not limited to China.

Accommodation

- Build the region's accommodation yields by aiming to develop accommodation of scale in McLaren Vale and upgrade 21 rooms in the region (from 3 to 4-star) by 2020.

Experience development

- Enhance existing experiences with a focus on food and wine, nature and wildlife, arts and culture, coastal and aquatic.
- Support operators to form partnerships and cluster their experiences.

Visitor infrastructure

- Develop nature-based walking and cycling trail infrastructure.
- Ensure that key tourism-associated jetties such as Normanville, Granite Island and Port Noarlunga are well maintained.
- Address signage gaps, especially around Langhorne Creek and the eastern entrance to the Fleurieu Peninsula, to ensure a cohesive approach to the region.



At \$437 million, the Fleurieu Peninsula has one of the highest visitor expenditure contributions of any region in the State.

PARTNERS



The key stakeholders are Fleurieu Peninsula Tourism and its member councils: Alexandrina Council, City of Onkaparinga, City of Victor Harbor and District Council of Yankalilla, and the South Australian Tourism Commission

Flinders Ranges and Outback



VISITOR SPEND

\$425 million

EMPLOYMENT IN REGION

1900 direct + 800 indirect

2600 jobs

1 in 12
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	672,000	\$97m
Overnight	694,000	\$329m
OVERNIGHT SPLIT		
International	41,000	\$15m
Interstate	229,000	\$140m
Intrastate	425,000	\$174m

OCCUPANCY AND RATES

	FLINDERS RANGES & OUTBACK	REGIONAL AVERAGE
Occupancy	42%	51%
RRevPAR (average yield of a hotel room)	\$52	\$79

516 tourism businesses

151 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Flinders Ranges and Outback priorities

The focus for the Flinders Ranges and Outback is to increase overnight visitation via greater regional and cross regional collaboration around touring routes and events. New products, infrastructure and capability building will be critical for success.

Marketing

- Promote strengths around immersive wildlife experiences, expansive natural landscapes, unique accommodation and local characters in the region.
- Maximise the region's appeal to the domestic drive tourism market and to European and North American markets.
- Develop a social media strategy for the region that leverages South Australia Tourism Commission's digital strategy and grows operator leads.

Events

- Grow the region's small number of hero events and focus on promoting existing hero events.
- Collaborate with major cross-border events (eg South Australian Living Artists Festival and Tasting Australia).
- Work with current event challenges (distance from markets, small communities and maintaining the willingness of volunteer organisers) to create operational efficiencies and capability.

Collaboration

- Encourage greater cross-council collaboration to maximise investment and impact for the region.
- Create cross-border tourism partnerships with neighbouring regions, states and territories to drive visitation and promotion.
- Use the Explorers Way as a strong platform for marketing, product and infrastructure development.
- Create promotional partnerships with the caravan and camping sector peak bodies.
- Identify ways to connect stakeholders across other key touring routes (e.g. Heritage Rail Trail, Southern Ocean Drive, Seafood Frontier and the Outback Loop).
- Increase the effectiveness of the region's Visitor Information Centres and outlets including development of digital capabilities and on-selling of visitor services.
- Support the Flinders Ranges World Heritage bid.



At \$425 million, the Flinders Ranges and Outback has one of the highest visitor expenditure contributions of any region in the State.



Industry capability

- Raise industry capability in digital marketing, tour guiding, events management and customer service.
- Provide mentoring and skills training for Aboriginal tourism operators.
- Explore ways of providing advice and support to organisers of the region's small events.

Accommodation

- Build the region's accommodation yields by aiming to develop 215 new rooms and upgrade 130 rooms (from 3 to 4-star) by 2020.

Experience development

- Foster the continued development of Station Stays across the region's network of pastoral tourism properties.
- Develop new and improve existing visitor experiences which reflect the region's strengths in nature-based, Aboriginal, pastoral and soft adventure tourism.

Visitor infrastructure

- Advocate for the sealing of the Strzelecki Track and the Lyndhurst to Marree road.
- Advocate for improved road maintenance and road closure procedures.
- Address the reliability of water and energy supply as impediments to regional tourism businesses.
- Significantly improve tele-communication black spot areas especially along key drive routes and tourism nodes.
- Several outback airstrips require maintenance and upgrades to be used safely for tourism.



With only 16 UNESCO World Heritage listed natural sites in Australia, achieving this for the Flinders Ranges would be a significant visitor drawcard.

PARTNERS



The key stakeholders are Regional Development Australia Far North, Flinders Ranges and Outback SA Tourism, Flinders Ranges Tourism Operator Association, Southern Flinders Tourism and Tastes, Coober Pedy Retail Business and Tourism Association, Flinders Ranges Council, District Council of Coober Pedy, Port Augusta City Council, Roxby Council, District Council of Peterborough, the Outback Communities Authority and the South Australian Tourism Commission.

Kangaroo Island



VISITOR SPEND

\$123 million

EMPLOYMENT IN REGION

500 direct + 200 indirect =

700 jobs

1 in 5 jobs
supported by the tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	38,000	\$6m
Overnight	148,000	\$117m
OVERNIGHT SPLIT		
International	43,000	\$31m
Interstate	36,000	\$29m
Intrastate	70,000	\$57m

OCCUPANCY AND RATES

	KANGAROO ISLAND	REGIONAL AVERAGE
Occupancy	57%	51%
RevPAR (average yield of a hotel room)	\$176	\$79

143 tourism businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Kangaroo Island priorities

As an established and thriving visitor region, the focus for Kangaroo Island is to exceed visitor expectations, deliver on the Island's brand proposition, grow visitor yield and dispersal and manage the sustainable development of tourism on the island. With highly seasonal visitation, growing visits during the quieter months of May–August continues to be important.

Marketing

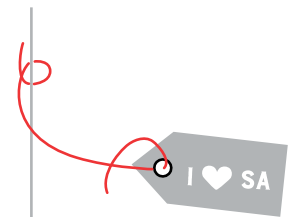
- Promote Kangaroo Island's brand essence of immersive nature and wildlife encounters and seasonal natural occurrences.
- Continue to build the profile of the Island's artisan producers, wine and other beverage makers and artists.
- Promote Kangaroo Island as an all-year destination by matching marketing to key seasonal offerings and events for domestic and international visitors.

Events

- Support the Island's existing signature events (eg Kangaroo Island Racing Carnival, Marathon, Ultra Marathon) and smaller established events to promote them to South Australians.
- Leverage major mainland events to encourage visits to Kangaroo Island and as marketing platforms.
- Prioritise new events that are activity-based, low-impact and reflective of the Island's brand positioning.

Collaboration

- Use the Southern Ocean Drive as a platform for marketing and cross-regional collaboration.
- Explore collaborative marketing opportunities with other regions.
- Build on relationships and align the Island's digital marketing efforts with South Australian Tourism Commission and Tourism Australia to maximise campaign leads.
- Investigate inclusion of the Kangaroo Island Wilderness Trail into Tourism Australia's Signature Walks program.
- Increase the range and effectiveness of visitor information services across the Island.
- Develop a multi-point visitor information service program (Kingscote and American River).
- Utilise operators more as visitor information advocates.
- Encourage and support operators to continue tourism operations in the winter months.
- Collectively monitor the cruise market's sustainability and impact while delivering on cruise visitor expectations.



Kangaroo Island has a higher proportion of international visitors than anywhere else in the State.



Industry capability

- Improve operator capabilities in digital marketing and international product and distribution (in particular for Chinese visitors).
- Address the shortage of skilled staff.

Accommodation

- Foster the development of at least 120 new rooms and upgrading of at least 30 rooms (from 3 to 4-star) by 2020.
- Establish ways to more accurately capture and track the Island's total bed capacity.

Experience development

- Activate Kangaroo Island Wilderness Trail as a hero experience to foster other experience development and drive low season visitation.
- Work with government, other agencies and operators to encourage investment in experiences around coastal, health, wellbeing and the arts.

Visitor infrastructure

- Advocate for improvements to coastal infrastructure. This includes the installation of roadside stopping bays for wildlife/nature encounters and the redevelopment of the Prospect Hill lookout.
- Priority coastal points include Kingscote, American River and Penneshaw.
- Improve telecommunication black spot areas.
- Address poor internal island transport links for visitors.



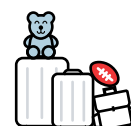
Kangaroo Island has the highest RevPAR of any region in South Australia.

PARTNERS



The key stakeholders are Tourism Kangaroo Island, Department for Environment and Water, Office for the Kangaroo Island Commissioner, and the South Australian Tourism Commission.

Limestone Coast



VISITOR SPEND

\$321 million

EMPLOYMENT IN REGION

2000 direct + 800 indirect

2800 jobs

1 in 18 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	717,000	\$104m
Overnight	594,000	\$217m
OVERNIGHT SPLIT		
International	45,000	\$16m
Interstate	226,000	\$78m
Intrastate	323,000	\$123m

OCCUPANCY AND RATES

	LIMESTONE COAST	REGIONAL AVERAGE
Occupancy	45%	51%
RevPAR (average yield of a hotel room)	\$53	\$79

765 tourism businesses

281 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia June 2017, Survey of Tourist Accommodation, Australian Bureau of Statistics, Regional Tourism Satellite Accounts; Deloitte/SATC

Limestone Coast priorities

The priority for the Limestone Coast is to increase overnight visitor volumes from international and domestic markets and convert some existing day trippers to linger longer and stay overnight. Being a predominantly self-drive visitor market, leveraging existing touring routes and promoting and developing hero tourism experiences and events that reflect the region's uniqueness will be key.

Marketing

- Focus on growing visitation via promoting the region's unique landscapes, immersive wildlife experiences and local food and wine experiences.
- Promote the region's winter visitor experiences including events.
- Raise the region's digital marketing footprint and align efforts with South Australian Tourism Commission's digital platforms for increased leads.

Events

- Strengthen the coordination and promotion of the region's events calendar (including Coonawarra Cabernet Celebrations, Generations in Jazz, Penola Coonawarra Arts Festival).
- Refresh existing events to meet changing consumer expectations, attract new markets and encourage overnight stays.
- Identify gaps and seek opportunities to host events that complement the regional calendar and brand.
- Build a regional proposition to attract corporate and business travellers and establish a regional business bureau.

Collaboration

- Leverage the Melbourne to Adelaide touring route (Southern Ocean Drive) via packaging or bundling existing experiences to visitors to drive increased visitation.
- Collaborate with the region's strong network of Visitor Information Centres and outlets to adapt to changing consumer needs, embrace new technologies and drive visitor dispersal and spend.

Industry capability

- Raise industry capability in digital marketing and customer service.
- Improve industry capability to cater to the small but emerging Chinese self-drive visitor market.
- Run regional event workshops on innovation and event development.
- Leverage the region's network of 24 operator associations to improve operator capabilities.



The Limestone Coast has more direct tourism employment than any other region in South Australia.



Accommodation

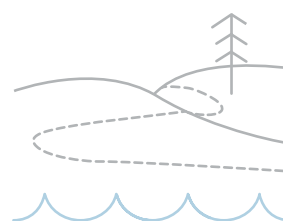
- Grow the region's accommodation yields by fostering the development of 17 new rooms and upgrade of 220 rooms (from 3 to 4-star) by 2020.
- Accommodation of scale is needed in the Coonawarra.

Experience development

- Create new experiences and increase the number of commissionable products to build the region's profile domestically and internationally.
- Develop hero experiences in the coastal and soft adventure areas.
- Bundle existing operator experiences to drive visitation to the region.

Visitor infrastructure

- Improve ongoing maintenance of key coastal infrastructure (jetties and boat ramps).
- Prioritise the enhancement of infrastructure around the region's natural assets such as national parks.



The Southern Ocean Drive touring route connects the Limestone Coast with the Coorong, Fleurieu Peninsula, Adelaide and Kangaroo Island. This appealing self-drive route provides visitors with a great way to experience the Limestone Coast's natural attractions and wineries.

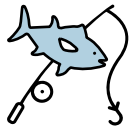
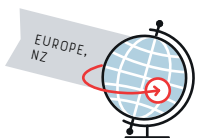
PARTNERS



The key stakeholders are the Limestone Coast Local Government Association and its member councils, the region's local tourism associations, Regional Development Australia Limestone Coast and the South Australian Tourism Commission.



Murray River, Lakes & Coorong



VISITOR SPEND

\$145 million

EMPLOYMENT IN REGION

900 direct + 500 indirect

1400 jobs

1 in 15
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	820,000	\$65m
Overnight	304,000	\$80m
OVERNIGHT SPLIT		
International	10,000	\$7m
Interstate	69,000	\$24m
Intrastate	226,000	\$49m

OCCUPANCY AND RATES

	MURRAY RIVER, LAKES AND COORONG	REGIONAL AVERAGE
Occupancy	54%	51%
RevPAR (average yield of a hotel room)	\$58	\$79

364 tourism businesses

103 businesses listed on Australian
Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Murray River, Lakes and Coorong priorities

The region's priorities are to grow visitor spend from intrastate day trips as well as increase overnight visits from interstate, intrastate and a small international base. As the region is a predominantly self-drive visitor market, leveraging existing touring routes and promoting and developing events and hero tourism experiences that reflect the region's uniqueness will be key.

Marketing

- Strengthen the region's position as a vibrant multi-faceted destination.
- Leverage and build upon The Bend Motorsport Park's all-year motor sports program.
- Maximise the region's penetration in the drive and boating tourism markets.
- Further grow the caravan and camping sector.
- Rejuvenate the consumer perception around river shacks (traditional shacks have been transformed into high-standard accommodation).
- Increase the promotion of highly appealing houseboat experiences.
- Increase the region's digital marketing and leads to operators and ensure alignment with South Australian Tourism Commission's digital strategy.

Events

- Address seasonality by working with the region's existing strong calendar of events and expand on seasonal fringe opportunities.

Collaboration

- Seek ways to calculate traffic flows and visitation to the region to assist planning and business cases for investment.
- Leverage private and public sector support for research.
- Partner with the Adelaide Convention Bureau and promote the region as a pre-and post-convention touring opportunity.
- Collaborate with the region's five neighbours on the Southern Ocean Drive and Mighty Murray Way touring routes to drive increased visitation and traffic flows.
- Encourage the region's Visitor Information Centres and outlets to expand their role as accessible touchpoints for visitors.

Industry capability

- Raise industry capability in the areas of digital marketing, booking distribution, business management, hospitality and customer service.
- Increase operator take-up of free Australian Tourism Data Warehouse listings.



Consumer research continues to highlight the very strong visitor appeal of houseboats and river shacks. These can be a key driver for destination selection for visitors.



Accommodation

- Grow the region's accommodation yields by fostering the development of 42 new rooms and upgrade of 54 rooms (from 3 to 4-star) by 2020.
- The region offers a growing range of ambient accommodation via houseboats, river shacks and glamping. Encourage the upgrade and ongoing development of experiential accommodation.
- Upgrade caravan parks to include more cabins and family-friendly amenities.

Experience development

- Develop the Murray Coorong 450km walking and cycling trail as a key experience in the region.
- Develop new Aboriginal experiences and on-water experiences.
- Use the region's new products (The Bend Motorsport Park and Monarto Zoo) as platforms for developing complementary experiences.

- Create new hero experiences at the Lower Lakes and northern ends of the region.

Visitor infrastructure

- Remove barriers to river-based tourism through the improvement of river infrastructure including navigational aids, moorings, boat washing facilities and other related visitor amenities.



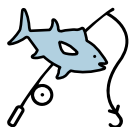
The Murray River flows more than 2500 kilometres from the Snowy Mountains to the Southern Ocean in South Australia. The Mighty Murray Way self-drive touring route provides visitors with ways to enjoy both water and land based experiences in this region. The touring route is a great way to promote the region.

PARTNERS



The key stakeholders are the Murray River, Lakes and Coorong Tourism Alliance; Regional Development Australia Murraylands; partner councils the Rural City of Murray Bridge, Mid-Murray Council, Coorong District Council, Alexandrina Council, District Council of Karoonda East Murray and Southern Mallee District Council; and the South Australian Tourism Commission.

Riverland



VISITOR SPEND

\$173 million

EMPLOYMENT IN REGION

800 direct + 500 indirect =

1300 jobs

1 in 18 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	443,000	\$44m
Overnight	386,000	\$129m
OVERNIGHT SPLIT		
International	8,000	\$7m
Interstate	95,000	\$32m
Intrastate	283,000	\$90m

OCCUPANCY AND RATES

	RIVERLAND	REGIONAL AVERAGE
Occupancy	44%	51%
RevPAR (average yield of a hotel room)	\$48	\$79

360 tourism businesses

124 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015-2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015-16; Deloitte/SATC

Riverland priorities

The priority for the Riverland is to increase visitation and length of stay from Adelaide as well as key interstate and international markets. A focus on all parts of the visitor mix are required: growing events, creating new visitor experiences, driving increased collaboration and supporting operators.

Marketing

- Promote the Riverland's strengths around wildlife experiences, nature and unique accommodation.
- Maximise the region's appeal to the drive tourism market particularly from Adelaide, New Zealand, Europe and North America.
- Use existing repeat visitors and the Riverland Ambassador Program to drive more visits to friends and family.
- Align the region's digital efforts with South Australian Tourism Commission's digital marketing strategy and drive operator leads.

Events

- Focus on growing existing events (eg Riverland Wine and Food Festival) to drive greater spend in the region.
- Coordinate local council event efforts to drive economies of scale and impact.

Collaboration

- Use the Mighty Murray Way touring route as a platform for marketing and collaboration across the two river regions.
- Encourage collaboration between the region's Visitor Information Centres and outlets to support regional priorities and improved information servicing.

Industry capability

- Raise industry capability in digital marketing, food and beverage delivery and customer service.
- Provide support to small operators as they build their tourism business.
- Encourage more operators to become bookable online and listed on the free Australian Tourism Data Warehouse directory.
- Foster use of the Riverland Event Management System for industry.



Accommodation

- Build upon the region's low accommodation yield by upgrading 71 rooms (from 3 to 4 star) by 2020.

Experience development

- Extend the range of experiences which are river related, family friendly and activity-based.
- Build on the region's growing food and wine reputation as an important linked area of investment.
- Upgrade and develop new experiential accommodation such as houseboats, caravan parks and luxury offerings.

Visitor infrastructure

- Improve river infrastructure including a slipway.
- Develop infrastructure in the region's national parks.
- Improve signage outside major towns that are located on the edge of the highways.



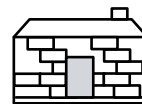
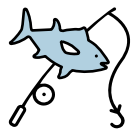
The Riverland region is the largest producer of wine in Australia.

PARTNERS



The key stakeholders are Destination Riverland; its partner councils Berri Barmera Council, Loxton Waikerie Council, Renmark Paringa Council and Mid-Murray Council; Regional Development Australia Murraylands Riverland; and the South Australian Tourism Commission.

Yorke Peninsula



VISITOR SPEND

\$198 million

EMPLOYMENT IN REGION

1000 direct + 600 indirect =

1600 jobs

1 in 15 jobs
supported by the
tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day Trips	625,000	\$51m
Overnight	518,000	\$147m
OVERNIGHT SPLIT		
International	6,000	\$5m
Interstate	61,000	\$19m
Intrastate	451,000	\$123m

OCCUPANCY AND RATES

	YORKE PENINSULA	REGIONAL AVERAGE
Occupancy	38%	51%
RevPAR (average yield of a hotel room)	\$40	\$79

461 tourism businesses

314 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2017, Survey of Tourist Accommodation 2015–2016, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2015–16; Deloitte/SATC

Yorke Peninsula priorities

Yorke Peninsula's priority is to increase visitor expenditure and dispersal from intrastate and interstate drive markets. Developing new and promoting existing experiences that play to the region's strengths of coastal lifestyle, wildlife and nature will be key.

Marketing

- Create awareness of Yorke Peninsula's offerings related to accessibility, open space, coastal landscapes, local produce, wildlife and aquatic experiences.
- Target the intrastate and interstate drive markets.
- Communicate the region's unique selling points to South Australians and Victorians.
- Align the region's digital efforts with the South Australian Tourism Commission's digital marketing strategy and drive operator leads.

Events

- Generate greater awareness of the region's current calendar of events especially during low season.
- Continue to build the appeal of the region's hero events (eg Kernewek Lowender and Yorke Peninsula Saltwater Classic).
- Grow mass participation events using the region's strong sporting facilities.

Collaboration

- Use the Coastal Way as a platform for encouraging dispersal and increased spend from repeat visitors.
- Evolve visitor information networks to meet changing visitor needs, drive greater dispersal and spend.
- Cluster or bundle operator experiences for marketing and trade purposes.

Industry capability

- Raise industry capability in customer service and consistent standards of delivery, including opening hours.



The Coastal Way touring route includes 20 natural, historical, indigenous, seafood and aquatic experiences to stop at along the way. This touring route provides a great way to cross promote the entire region.



Accommodation

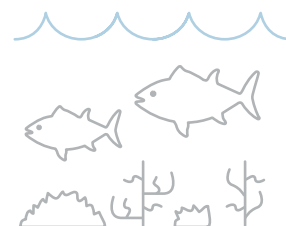
- Develop one major 4 or 5-star accommodation product of scale and aim to upgrade 44 rooms (from 3 to 4 star) by 2020.
- Upgrade the accommodation options within the region's strong network of caravan parks.

Experience development

- Create additional experiences and increase the number of commissionable products for the interstate and cruise markets.
- Generate greater awareness and conversion through the distribution system.
- Encourage more commercial operator experiences around key projects such as Rewilding Yorke Peninsula, Windara Reef, Walk the Yorke and Moonta Mines. These are potential breakthrough projects for the region.

Visitor infrastructure

- Address the Port Wakefield road bottleneck which impacts travel to and length of stay in the region particularly in peak times.
- Maintain key coastal infrastructure such as jetties and boat ramps.



South Australia's largest artificial shellfish reef near Ardrossan will be fully established by 2019. This will attract significantly more fish for recreational anglers.

PARTNERS



The key stakeholders are Yorke Peninsula Tourism; its funding partners, the Copper Coast and Yorke Peninsula Councils and the District Council of Barunga West; Regional Development Australia Yorke and Mid North and the South Australian Tourism Commission.



LET'S BUILD A GREAT
FUTURE TOGETHER

