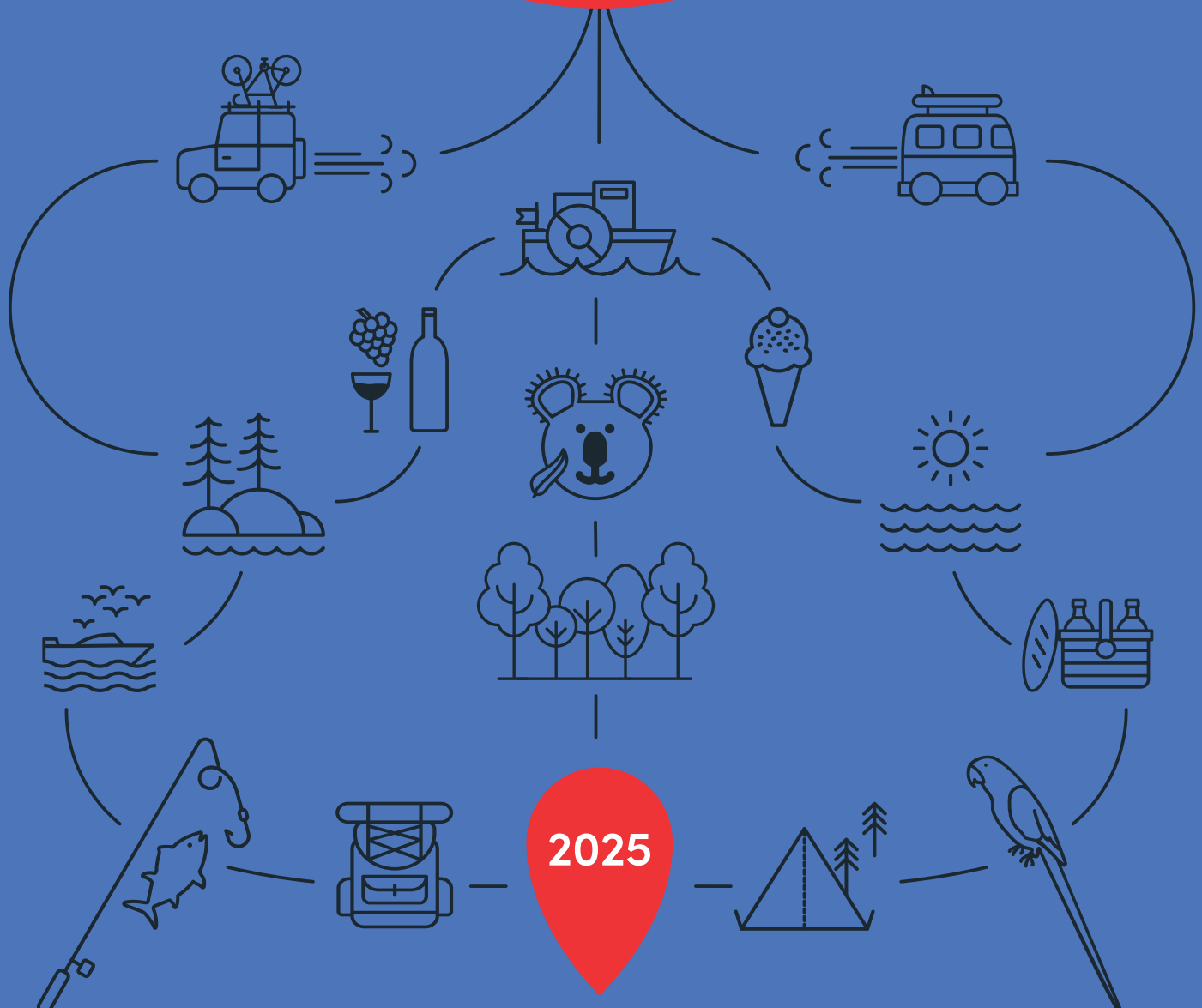


SOUTH AUSTRALIAN REGIONAL VISITOR STRATEGY



**Realising the potential of the
regional visitor economy by 2025**



ACKNOWLEDGEMENT OF COUNTRY

South Australia's Regional Tourism Organisation's, the South Australian Tourism Commission, and their collective stakeholders acknowledge Aboriginal people as the First People and Nations of the lands and waters we live and work upon.

We pay our respects to their Elders past, present and emerging. We acknowledge and respect the deep spiritual connection and relationship Aboriginal and Torres Strait Islander people have to Country.

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**OUR REGIONS ARE CRITICAL TO THE SUCCESS
OF SOUTH AUSTRALIA'S VISITOR ECONOMY.**



**LET'S WORK TOGETHER TO REBUILD
A THRIVING RESILIENT REGIONAL
TOURISM INDUSTRY**

**When you align strategies with the latest visitor
research, collaborate across the visitor economy
and are accountable for local action, the results
will speak for themselves.**

Message from the Chair

Our resilience, adaptability, inventiveness and unimagined collaboration will guarantee the prosperity of regional tourism.

Regional Tourism across Australia experienced enormous change over the last decade. Changes in visitor expectations, technology and key markets have required collaboration and adaptation to generate results. And that is exactly what South Australian regions did.

The first South Australian Regional Visitor Strategy was a standout achievement. A sustainable plan for regions by regions. By December 2019, regional tourism had generated 44 cents in every tourism dollar for the State. Collectively we achieved the 2020 target with a result of \$3.6 billion in regional visitor expenditure one year early in December 2019.

Early 2020 then delivered a very different set of challenges that brought uncertainty and severe disruption from drought, bushfires, and COVID-19. These difficulties required resilience, flexibility, and unimagined levels of collaboration. Ongoing evaluation and agreement on critical priorities for regeneration and growth in South Australian regional tourism demands new thinking and decision making. We have become adaptive learners; demonstrating our ability to observe, decide and act quickly.

During the creation of this 2025 Strategy, the Regional Visitor Strategy Steering Committee boosted consultation, communication, and local engagement, always mindful of involving all levels of Government and private investment in helping us to achieve the outcome of a vibrant and sustainable regional tourism economy. The 2025 South Australian Regional Visitor Strategy is our regional roadmap for navigating these challenges together and delivering future prosperity for all.



A handwritten signature in black ink, which appears to read 'H. Edwards', with a horizontal line underneath.

Helen Germein Edwards
Chair, Regional Visitor Strategy Steering Committee

Source: South Australian Tourism Plan 2020

Message from the Premier

Regional tourism has never been more important to the South Australian visitor economy.

In June 2018, the South Australian Government released the 2020 South Australian Regional Visitor Strategy (RVS). Developed through collaboration between the Regional Tourism Chairs Forum, Regional Development Australia network, Local Government Association of South Australia, Tourism Industry Council of South Australia, and the South Australian Tourism Commission, the 2020 RVS outlined the strategic priorities of South Australia's 11 tourism regions.

Two years later, I am pleased to recognise the success of the 2020 Regional Visitor Strategy. The outstanding results, strategic alignment across all 11 regions and true collaboration are central to this new 2025 Regional Visitor Strategy.

This new 2025 RVS supports the South Australian Visitor Economy Sector Plan 2030 which was released in August 2019. As a key economic pillar identified in South Australia's Growth State Strategy, the Visitor Economy Sector Plan sets targets for creating new jobs and growing visitor expenditure to \$12.8 billion by 2030.

As we navigate through these extraordinary times, the State Government will support South Australia's economic recovery by working across government at all levels (federal, state and local), with industry and through the South Australian Tourism Commission to deliver key outcomes for 2025.

COVID-19 has significantly impacted our tourism industry, however working together, we are supporting a plan that will focus our rebound and recovery and drive our visitor economy back to the record levels achieved pre-COVID-19. Prior to the triple crises of bushfires, drought and COVID-19, South Australia was welcoming a record number of visitors, with the

State's visitor economy soaring to an unprecedented \$8.1 billion in value. Domestic visitors primarily led this growth, with interstate expenditure up 20 per cent and intrastate expenditure up by 34 per cent.

Reinforcing the importance of regional tourism to South Australia's economic recovery is a key focus area of the 2025 South Australian Regional Visitor Strategy. The Strategy will be a critical guide in restoring the State's visitor economy. The Regional Visitor Strategy Steering Committee will lead the implementation of this strategy focussed on realising the potential of growing visitor expenditure in our regions.

I want to acknowledge and thank the number of stakeholders including industry, that represent our 11 regions, for working collaboratively to develop a Strategy that recognises the enormous potential to grow the visitor economy across South Australia.



A handwritten signature in blue ink, reading "Steven Marshall".

Hon Steven Marshall MP
Premier of South Australia



Executive summary

The 2025 South Australian Regional Visitor Strategy is a roadmap for the industry to navigate challenges and seize opportunities.

This strategy has been developed during a time of unprecedented uncertainty. Despite the severe disruption of drought, bushfires and COVID-19, regional tourism in South Australia is proving its resilience. This 2025 South Australian Regional Visitor Strategy builds upon the legacy and successes of the 2020 strategy and aligns with the State's 2030 Visitor Economy Sector Plan pillars and priorities.

This strategy has been based on four simple principles:

1. A focus on the health and wellbeing of our visitors, operators, and community.
2. Restoring sustainable visitation and access to regions and adapting to changing consumer needs.
3. Rebuilding business continuity and workforce development plans.
4. Creating a pipeline of appropriate investment to ensure thriving future regional communities.

For maximum alignment of resourcing and effort, stakeholders from all levels of government, regional tourism associations and operators have been involved in the creation of this strategy. In fact, over 800 regional stakeholders from across all 11 South Australian regions have contributed.

The opportunity

Regional tourism is critical to the State's visitor economy. It generates 17,200 direct and 7,000 indirect regional tourism jobs and \$3.6 billion in visitor expenditure. Across the State there are over 18,000 tourism businesses, with over 5,300 based in the region. In fact, by 2025 South Australian regional visitor spend has the potential to grow to \$4 billion. Although only 23% of South Australians live in regional areas, these areas account for over 40% of the State's total visitor spend currently. To reach this 2025 potential, regions have collectively agreed on the following priority action areas:

Marketing

Customers continue to grow their use of digital channels for trip inspiration, planning, booking, and experience sharing. Natural disasters and COVID-19 mean consumers now rely even more on digital channels for real time updates. They seek reassurance of what is open, safe, and of course what exceptional visitor experiences are on offer. Showcasing each region's unique experiences through richer storytelling and better targeted digital marketing that aligns with the South Australian Tourism Commission's and Tourism Australia's activity, is required across all regions. COVID-19 has also meant regions need to prioritise domestic markets in the medium term, while remaining agile to international market opportunities as they re-emerge. Understanding the latest consumer research on travel preferences and behaviour across different target audiences is essential.



LAKE GAIRDNER, EYRE PENINSULA

Experience and supply development

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

Consumers are also seeking quality and experiential accommodation in remarkable natural environments and more of this is needed in regional South Australia. This will help lift regional room rates, occupancy levels and visitor spend. By 2025, over 500 new rooms are required across regional South Australia plus over 800 rooms require refurbishing. These developments will generate jobs in the construction phase and ongoing jobs within the regional visitor economy.

Well-maintained visitor infrastructure provides a safe and enjoyable visitor experience, helps protect the natural environment and supports operator growth. Key priorities include improvements to regional nature trails (an area of high visitor demand), regional roads, the supply of reliable telecommunications across all areas and upgrading of public amenities such as toilets, rubbish bins and better waste management across coastal, outback and remote areas. Other priorities identified by regions include coastal, marine and aviation infrastructure and signage.

Collaboration

Borderless collaboration was a fundamental theme of the 2020 Strategy and continues for this 2025 Regional Visitor Strategy. That means working closely with other Australian States, the Federal Government, neighbouring South Australian regions (including Adelaide), local government, and all partners within a region. Visitors do not see borders, just great experiences. This is particularly important when further developing and promoting regional self-drive touring routes across the State - an experience proving very popular since COVID-19. The continuation of co-ordinated tourism pandemic and natural disaster responses are essential, helping to provide visitors with reassurance they are in good hands, and tourism operators with the knowledge they are well supported.

Industry capability

One of the most important pillars of this strategy is supporting regional operators with the skills needed to navigate these uncertain times. Specific skill development areas include business continuity and risk management skills, digital marketing, event management, working with distribution intermediaries, customer service training, storytelling, and tourism grant writing. Government and industry bodies will need to work closely to drive this effort. Tourism accreditation can be a way for industry to drive business standards which can reduce government compliance costs and deliver a professional and capable industry.

Leisure and business events

Regional South Australia offers a diverse selection of local festivals and events. They range from sporting, arts and heritage events, food and drink festivals, community markets to business meetings and conferences. Events are a valuable way to build awareness of a region, drive visitation and create a unique personality for each region. Tourism's new normal means regions must adapt and innovate with the delivery of COVID-19 safe event experiences for visitors and the community. This includes dispersing event activities throughout a region and extending benefits more broadly. Events however remain resource-intensive and rely heavily on volunteers. A focus on long-term regional event capability building is needed so events can continue to be a major drawcard for regions.

Promote the value of tourism

Promoting the value of regional tourism will help the industry to bounce back better. Collectively, regions need to demonstrate tourism's economic, social, cultural, and environmental value. Tourism is a sector that not only drives visitor dollars into local businesses but provides exciting careers in regional communities, better infrastructure for locals to enjoy, and plays a role in protecting natural and man-made heritage assets. Ongoing research and performance data that demonstrates the value of tourism must be shared widely. The priority is to engage with local community, government, and regional tourism operators to continue to champion the benefits of regional tourism.

Enablers of the visitor economy

Enabling a successful and thriving regional visitor economy requires government support across three key areas. Firstly, by creating new and maintaining existing regional public infrastructure, secondly by streamlining regulations to make it easier for operators to innovate and develop sustainable tourism opportunities, and finally through ongoing industry skills development.

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. The final section of the document outlines South Australia's 11 individual regional response priorities. Each region's summary details a concise list of actions and areas of collaboration required to meet regional targets.



2020 Regional Visitor Strategy

- what we achieved together

By December 2019, South Australian regional tourism had generated 44 cents in every tourism dollar for the State. The regions had collectively achieved the 2020 target of \$3.6 billion one year early.

Regional visitor economy results

- 36% increase in visitor expenditure
- 1.8% increase jobs in regions
- 2% increase in regional tourism businesses
- 22% increase in new or upgraded rooms
- 127% increase in Australian Tourism Data Warehouse operator listings
- 226% increase in regional operators leads from South Australian Tourism Commission consumer website
- 62 Wi-Fi hotspots installed regionally



Since 2015, South Australia's visitor economy expenditure has grown on average by 8% annually.

Source: Regional Tourism Satellite Accounts 2018-19, Tourism Research Australia - National Visitor Survey and International Visitor Survey December 2017 - December 2019

COVID-19 and natural disaster impact

The United Nations World Tourism Organisation has forecast that the COVID-19 global health pandemic will reduce international visitor arrivals by over 70% in 2020.

To date, Australia has fared better than many other global destinations, regarding the spread of the virus and health impacts on our population. At the time of writing, Australian borders are closed for international travel however, it is anticipated they will gradually open in 2021. What we do know is that even in the most optimistic scenarios, at least 2021 will be COVID-19-affected and there will be a heavier reliance and priority placed on domestic tourism for at least the next three years. Domestic visitors currently contribute 94% of visitor spend in South Australian regions annually. The opportunity to grow new and loyal interstate and intrastate visitors is there for the taking.

As well as a global health pandemic, recent and recurrent natural disasters such as drought and bushfires have significantly impacted South Australian regional tourism infrastructure, landscapes, and operators. Over the last two years alone, Adelaide Hills, Kangaroo Island, Limestone Coast, Eyre Peninsula, and Yorke Peninsula have all been impacted by bushfires, while certain parts of the Flinders Ranges, Outback, Riverland, Eyre Peninsula, and Kangaroo Island have been or continue to be drought effected.

Consumer impact

- The recession in 2020 in Australia led to consumer confidence dipping, and reduced consumer spending including on travel. As restrictions continue to lift this will continue to slowly ease.
- Shorter booking lead times - With ongoing uncertainty and changing travel regulations, consumers have shifted to shorter booking lead times and an increased interest in flexible booking terms.
- Road trip boom - With over 82% of visitors arriving in South Australian regions by car, the growth in self-drive touring continues. Car travel represents control of the journey, who is in the car and most importantly, being able to return home without relying on an airline or travel company to facilitate the journey. Drive touring itineraries are in high demand and help consumers understand what a region has on offer.
- International trip substitution - While Australians are travelling more domestically, they are not directly substituting a three-week European holiday for an equivalent in Australia, but rather creating shorter more frequent domestic travel itineraries.
- Greater desire for nature – The desire to connect with nature, space and the outdoors has increased during lockdowns and restrictions and provides travellers with physical and mental health benefits.
- Greater desire for wellness experiences – Consumers are increasingly placing more value on their own health and seeking ways to enhance, kickstart or maintain their own wellbeing through wellness tourism experiences.

Tourism operator impact

- Business continuity plans – There is a critical need for businesses to identify what is required to adapt, operate, and survive when faced with minor or major disruptions to business operations.
- Adapting ongoing business practices – COVID-19 safety and hygiene protocols and natural disaster risk mitigation plans are now seen as standard requirements for tourism business operations.
- Workforce development – There is a strong ongoing need to support tourism workers and business owners with new skills and to address regional labour market shortages.
- Diversifying business offerings - Alternative experience offerings, new product development and diversification are becoming important ways to navigate the uncertainty.




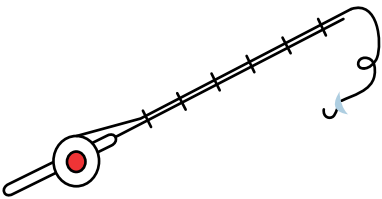
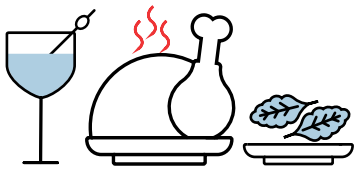
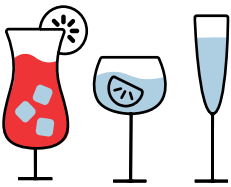
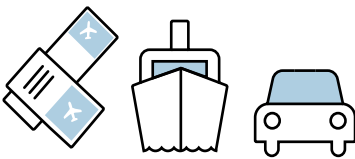
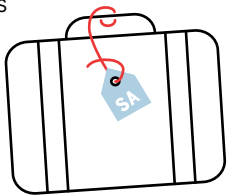
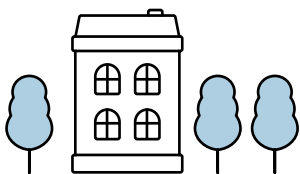


What is the visitor economy?

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 sectors as well.

VISITOR ECONOMY
= any money spent
by visitors in South
Australia

SECTORS OF THE VISITOR ECONOMY - DIRECT TOURISM OUTPUT

<p>Accommodation \$325m</p> 	<p>Other retail trade \$368m</p> 	<p>Dining out \$336m</p> 
<p>Clubs, pubs and bars \$203m</p> 	<p>All transport \$750m</p> 	<p>Travel agency and tour operator services \$414m</p> 
<p>Dwelling ownership \$320m</p> 	<p>Education and training \$251m</p> 	<p>Other \$320m</p> 

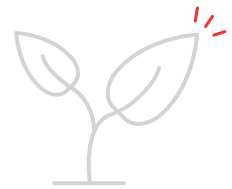
Source: State Tourism Satellite Account 2018/2019 - Direct Tourism Output by Industry

South Australian 2030 Visitor Economy Sector Plan

The State's visitor economy, with tourism at its epicentre, delivered \$8.1 billion spend to the South Australian economy in the year to December 2019. It also directly employed 40,500 people across 18,000 businesses.

Prior to COVID-19 and the recent bushfires, the South Australian visitor economy had experienced strong and consistent growth, outpacing the overall South Australian economy by more than double from 2013-2019. The 2030 South Australian Visitor Economy Sector Plan builds on this growth and has a bold ambition of growing the visitor economy by 37% to \$12.8 billion by 2030 and an additional 16,000 jobs in South Australia. The plan also highlights the very significant role of regional South Australia in driving the State's overall success. A regional expenditure target of \$5.1 billion has been set for 2030.

The priority areas for the 2030 South Australian Visitor Economy Sector Plan are shown in the figure below.



Between 2013 and 2019, State-wide tourism expenditure grew by 57%.

SOUTH AUSTRALIAN 2030 VISITOR ECONOMY SECTOR PLAN PRIORITIES



Source: Regional Tourism Satellite Accounts 2018-19, Tourism Research Australia - National Visitor Survey and International Visitor Survey December 2013 - 2019

Importance of regional tourism

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

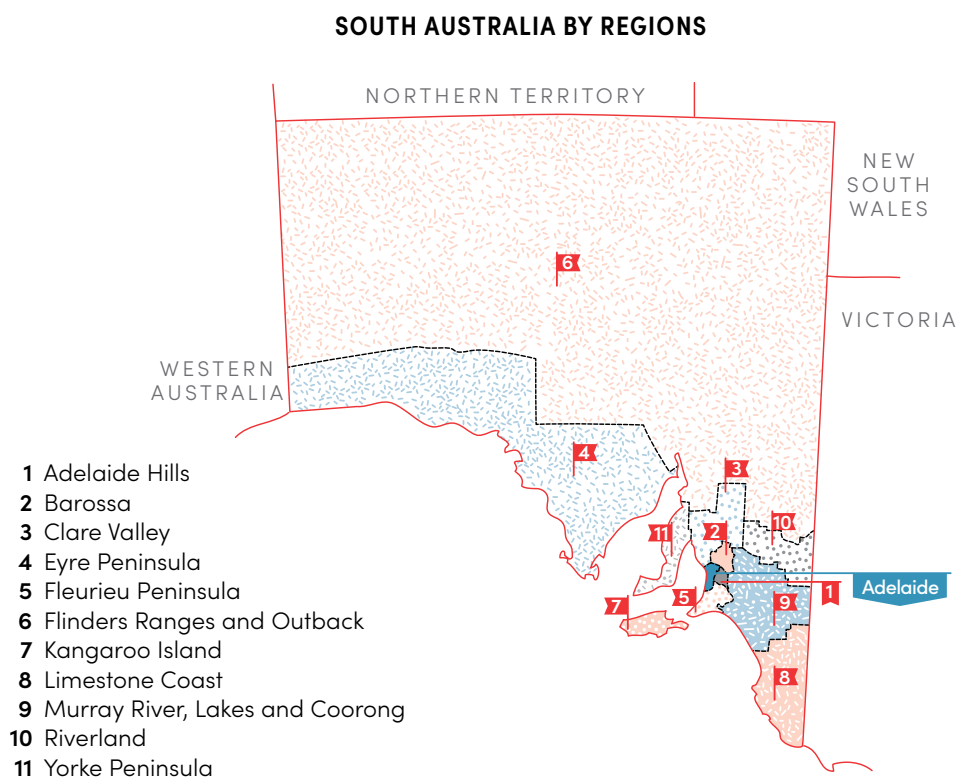
- \$3.6 billion in visitor expenditure
- 44% of all State visitor expenditure
- 17,000 tourism jobs in regions
- 43% of all State direct tourism-related jobs
- Up to \$5.1 billion in visitor expenditure by 2030

Raising the awareness of South Australia's regional tourism value and its contribution to the State's visitor economy is vital. Local government, local industry associations and national peak bodies all have an advocacy role to play.

Advocacy partners for this include local government, local industry associations and national peak bodies such as Restaurant and Catering Association and the Australian Hotels Association.



The State's six signature touring routes provide inspiring itineraries to explore regional South Australia.



Source: South Australian Visitor Economy Sector Plan 2030, Regional Tourism Satellite Accounts 2018/2019, Tourism Research Australia – National Visitor Survey and International Visitor Survey December 2019

Regional visitor snapshot

HOW VISITORS ARRIVE IN REGIONS

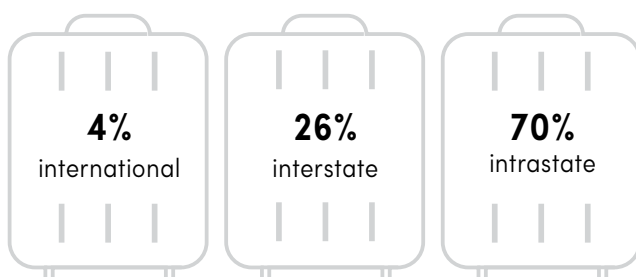


The remaining visitors arrive in regions by air, train, bus or tour vehicle.

PURPOSE OF REGIONAL VISIT – OVERNIGHT VISITORS

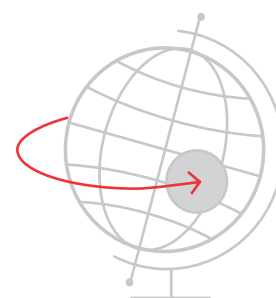
- 52% holiday
- 28% visiting friends or relatives
- 17% business
- 5% education and other

REGIONAL VISITOR EXPENDITURE

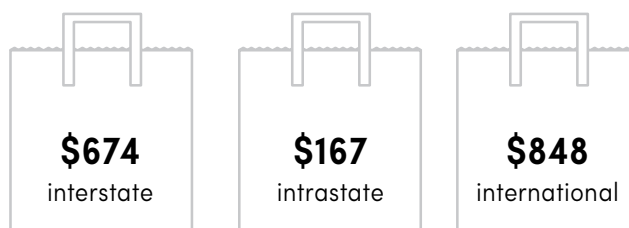


TOP 5 INTERNATIONAL VISITOR SPENDS IN REGIONS

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



AVERAGE VISITOR SPEND IN REGIONS



AVERAGE LENGTH OF STAY IN REGIONS PER TRIP

- 4 days for interstate visitors
- 1 day for intrastate visitors
- 10 days for international visitors

INTERSTATE OVERNIGHT VISITORS IN REGIONS

- 56% are from Victoria
- 19% are from New South Wales
- 12% are from Queensland

Source: Tourism Research Australia – National Visitor Survey and International Visitor Survey December 2019

Strategic partners

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

The range of partners required to grow South Australia's regional visitor economy and deliver the recommendations contained in this strategy is extensive. More than 800 regional operators and stakeholders participated in workshops and online surveys to review individual regional priorities and key actions required.

Each strategic partner plays a valuable role in contributing their own resources and expertise. They include:

- Private sector (tourism and non-tourism)
- Local Government Association of South Australia
- Regional councils
- Regional Tourism Organisations
- Regional Development Australia
- Tourism Industry Council of South Australia
- 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 strategic partners external to the regions which have a partnership role to play such as airlines, airports, and Adelaide-based operators.



Strategic pillars

Marketing

The South Australian Tourism Commission provides the largest regional marketing engine for the State delivering over 1 million leads to operators annually. Combining this with the marketing efforts of over 5,000 regional tourism operators, creates an opportunity for even greater marketing impact. Tourism Australia, regional tourism organisations and local councils all play a crucial role in harnessing this collective effort.

Regional marketing priorities

1. Attract the right visit mix

A global pandemic and the closing of international borders has meant regions needed to adjust their visitor priorities. The outcome is an even greater focus towards domestic leisure markets in the medium term, while staying agile to specific international market opportunities as they arise. Many regions will also put extra effort in attracting domestic business visitors for events, meetings, and conferences. Domestic visitors currently contribute 94% of all visitor spend in regions, with total interstate visitor spend growing 10% in the last 3 years. From an intrastate perspective, Adelaide's 1.33 million residents represent a significant pool of potential visitors. Adelaide also plays a critical role as a visitor access point to regional South Australia.



2. Utilise the right marketing channels

Digital

Harnessing digital marketing channels is a priority for all regions. Customers continue to grow their use of digital devices for destination inspiration, planning, booking, and experience sharing. The bushfires and COVID-19 mean consumers now rely even more on digital channels for real time updates from regions and operators. They are seeking reassurance of what is open, current safety and hygiene protocols, and of course what exceptional visitor experiences are on offer. Positive social media engagement from visitors can also have a powerful impact on a region and an operator's business.

Partner Channels

Federal and State government tourism activity across digital, public relations, and events provide opportunities for regional exposure. As a result of the bushfires and COVID-19, Tourism Australia has re-engaged its role in domestic tourism with consumer initiatives. Working closely with Tourism Australia, the South Australian Tourism Commission's domestic and international marketing strategy is heavily geared towards digital channels and provides significant lead generation and content opportunities for regions and operators. Other priority marketing partners for regions include Adelaide Convention Bureau, StudyAdelaide, Flight Centre, RAA, Phil Hoffman Travel, numerous retail travel agents,



ADELAIDE FRINGE FESTIVAL

Qantas Airways, Virgin Australia, Regional Express and the Australian Tourism Data Warehouse (ATDW). ATDW provides free business and regional event listings which enable a variety of partners to extract this information and use it on their own sites. Currently there are over 5,000 regional ATDW listings with the goal of growing this by another 10% by 2025.

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. Showcasing regional experience strengths

There are many outstanding regional visitor experiences on offer in South Australia and the priority is to storytell to potential visitors, triggering visitation and spend. These experiences can range from food and drink, tours, accommodation, nature-based experiences to local festivals and events. Based on customer insight and appeal, signature experiences can be used as a marketing hook to 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.

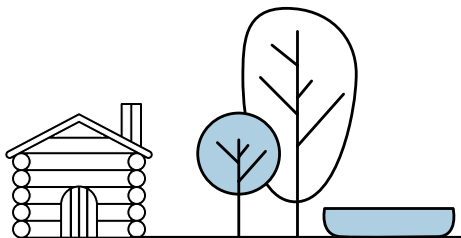
4. Role of messaging

COVID-19 has redefined travel and provided an opportunity to reaffirm South Australia's 'A Curious Place' brand positioning and messaging to the Australian market.

Understanding the latest travel preferences of potential visitors is essential for impactful marketing messaging. The global health pandemic has led to consumers now seeking an even greater connection to nature and open spaces, something South Australian regions can easily deliver. Overall South Australian regions offer iconic nature-based experiences, wine regions, distinctive dining, fresh local produce, wildlife, coastal experiences, authentic local festivals, events, art, history and cultural experiences (including Aboriginal). Marketing messaging can also help drive off-peak, shoulder season or winter visitation by demonstrating the travel benefits and experiences on offer during these times.

SUPPORTING THE BRAND POSITIONING OF 'A CURIOUS PLACE' ARE FIVE BRAND PILLARS THAT SET SOUTH AUSTRALIA APART FROM ITS COMPETITORS:

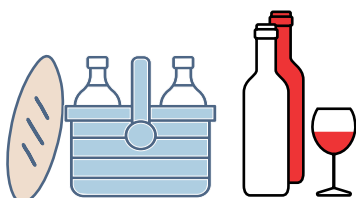
1



NATURAL THERAPY

From off grid cabins to natural thermal pools on the edge of the outback, South Australia allows you to slow down, disconnect and immerse in nature without sacrificing comfort or style.

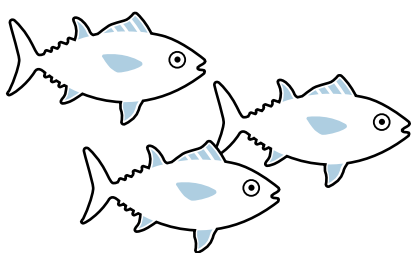
2



ACCESSIBLE PROVENANCE

Visitors can enjoy fresh local produce in amazing natural locations. There is nothing better than connecting visitors with the source of the food and beverages they are enjoying. Meet winemakers, learn about wine production, and sample South Australia's finest.

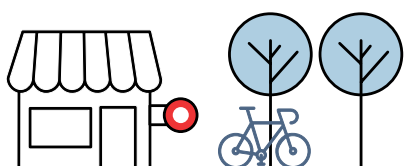
3



WILDLIFE ENCOUNTERS

Share pristine beaches, national parks, the outback, and wild coasts with some of Australia's most iconic wildlife. Observe koalas, kangaroos, echidnas, and native birds in their natural habitat. Swim with sea lions, tuna or even cage dive with sharks.

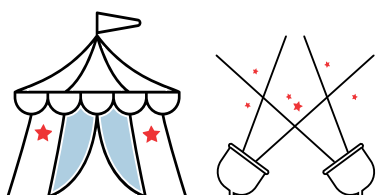
4



THE COOLEST BOUTIQUE CAPITAL

Bursting with creativity and personality, Adelaide is ready to be explored. Enjoy outdoor adventures, bustling bars and restaurants and welcoming locals.

5



LOVES A PARTY

Voted as the Best Event State in Australia in 2020, South Australia delivers over 500 events and festivals across 52 weeks that showcase the State's exceptional food, drink, sport, art, and vibrant city life.

Experience and supply development

Experiences

The opportunity is to combine each region's amazing natural and built assets with new or enhanced sustainable visitor experiences. These should reflect each region's uniqueness and the latest insights on what visitors are seeking.

Regional experience development priorities

1. Nature-based

Since COVID-19, visitors are continuing to seek more nature-based experiences for social, physical, and mental benefits. There is now increased demand and interest from all regions to boost nature trail-based activities like hiking, cycling and soft adventure experiences.

2. Food and beverage

Immersive local food and beverage experiences that further entrench the State's leadership position in this space are a continued priority for all regions.

3. Experience packages and bookability

With increased work and life pressures, regions need to make it easy for the consumer to decide where to go and what to book. Experience bundling helps visitors to easily understand what is 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. Working with distribution intermediaries is another way to get regional product packaged and bookable via new channels.

4. Wellness

Wellness tourism experiences are experiences that maintain, kickstart or enhance a visitor's wellbeing while on a trip. Some examples of wellness experiences include great local food, spa experiences, yoga, meditation, immersive wellness retreats, and of course nature-based attractions.

Many regions are looking to grow this part of their visitor mix and attract this high yielding, year-round sustainable visitor segment.

5. Aboriginal

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.

6. Cruise

Regions are looking to develop more onshore excursions for cruise visitors (including expedition vessels and small ships) that can be pre-booked by intermediaries and cruise operators for when the cruise market resumes. While the cruise sector is still only a relatively small portion of all visitors to the State, it can provide an additional economic boost to local communities when managed appropriately.

Support required

- Focus on enhancing existing and creating new signature experiences.
- Share the latest ongoing consumer research on appealing experiences for different visitor groups to assist experience development and refinement.
- 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.

Accommodation

As competition across Australian regions intensifies, visitors are expecting 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 was conducted as part of the South Australian Tourism Plan 2020 and has been updated for this 2025 Strategy and has revealed:

- The standard of tourism accommodation in regional South Australia is lagging other States.
- A shortage of accommodation, especially of scale, can inhibit regional tourism development in some locations.
- More unique and experiential accommodation is needed in regions.

- Holiday and caravan parks are in a phase of growth (including cabins) and require ongoing investment.
- New regional rooms are still required across the State – with a target of 500 new rooms by 2025.
- Many regional rooms require an upgrade from three to four-star standard – with a target of 800 upgraded rooms by 2025.
- Revenue per available room and occupancy rates are low for some regions, particularly during winter.
- There is a need to drive more mid-week overnight stays across all regions.

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 holiday and caravan parks and the camping sector to continue to build the quality and appeal of their accommodation and gain access to funds for improvements.
- Assist operators to develop strong business cases for investment in new developments and enhancements.



THE CUBE, MURRAY RIVER, LAKES AND COORONG

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 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:

- Road-related infrastructure including new or enhanced parking bays and pull-out areas.
- Sealing specific routes (e.g. Strzelecki track) and upgrading some unsealed roads. This will allow regions to attract new visitor markets and enable hire car traffic.
- Road widening, shoulder sealing, passing lanes and fixing bottlenecks on popular regional routes (in particular Port Wakefield interchange).
- Ensuring road stops include appropriate amenities such as toilet blocks, rubbish bins and waste collection facilities.

2. Trails

COVID-19 has seen an increasing desire from visitors to spend more time experiencing nature-based tourism assets.

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.

3. 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. Addressing Wi-Fi and telephony black spots is critical as they impact both visitors and tourism operations.

4. Coastal, river and marine infrastructure

Most South Australian regions rely on water as not only a critical asset but a visitor attraction. Water-related infrastructures such as jetties, wharves, boat ramps and navigation aids are crucial to activating tourism experiences. Regions strongly support ongoing maintenance of this critical maritime infrastructure.

5. Signage

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

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

6. Air access

Regular passenger aviation

Visitors are often time poor, so growing affordable regional aviation options will aid visitor dispersal rates and volumes. The priority is to continue discussions between airports and airlines to increase flights into regional areas when 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.

Support required

A whole of government approach across departments and local, state and federal jurisdictions is required to deliver on these critical regional infrastructure and development priorities.

A long term view with regard to funding commitments and sustainable investment is also essential.

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

Collaboration

The 2025 Regional Visitor Strategy was created from a strong desire by all partners to continue 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:

- Neighbouring South Australian regions;
- The five States that connect to 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 and Metro areas.

Regional collaboration priorities

1 Natural disaster and pandemic coordination

The new normal of tourism means that ongoing co-ordinated tourism responses relating to COVID-19 and potential natural disasters are a must. This cohesive approach supports tourism operators during difficult disruptions and reassures visitors in times of uncertainty. Resilience building priorities include sharing of industry learnings on new ways of

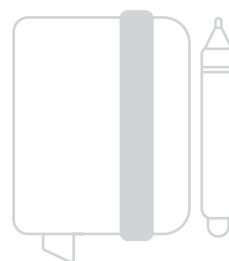
mitigating risks, communicating with visitors, and diversifying or adapting business offerings.

2 Touring routes

COVID-19 travel disruptions have led to a surge of self-drive touring visitors into regional South Australia. Consumer research shows touring routes provide potential visitors with a way to understand what a region has to offer and thus encourage visitation, greater dispersal, and discovery.

Given 82% of visitors to regions arrive by car, the South Australian Tourism Commission has developed six highly appealing 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
- 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.



Over 800 stakeholders participated in workshops, surveys and consultation in creating this strategy.



CYGNET RIVER, KANGAROO ISLAND

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

3 Visitor information services

Visitor information servicing continues to rapidly evolve as consumers seek timely, inspiring, and practical information via multiple channels during their trip. In addition to face-to-face information delivery, the use of digital platforms and mobile phones is now a critical part of the visitor servicing mix. All regions in collaboration with councils and industry stakeholders, agreed that their visitor servicing goal is to encourage visitors to stay longer, do more and share their great experiences.

4 Regional festivals and events

A consistent theme throughout this strategy is the need to foster a sustainable regional event program. Events can be resource intensive and require strong collaboration and sharing of expertise amongst local councils, volunteers, and other key event organisers. Appropriate timing of events across and within regions is needed for maximum flow on benefits.



There are 41 accredited visitor information servicing centres throughout Australia.

Industry capability

Championing industry skills development helps grow both operator revenue and the wider visitor economy. Building resilient and agile tourism businesses is the top priority for all regions.

Regional capability priorities

1 Industry resilience

All regions believe that ongoing support for operators in the space of resilience and business continuity planning is needed. This includes developing skills required for new market and experience development, business cases and grant applications, as well advocating and supporting operator mental wellbeing during times of high stress and uncertainty.

2 Digital capability

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

3 Event management

All regions require continued training and support related to running visitor events especially in a COVID-19 safe way. Workshops, toolkits, and best practice event management systems are required.

4 Understanding third-party distribution intermediaries

Understanding pricing structures and commissions for third-party distribution channels such as travel agents, wholesalers, online travel agents (OTAs) and inbound tour operators (ITOs) is a training need for many regional operators. Partnership with third-party distributors can foster greater marketing and sales impact.

5 Business management

General business management was another area identified for skills training. Identifying, promoting, and connecting with existing organisations offering such training is recommended. Other opportunities are through formalising business credentials and quality through accreditation and engaging in business development programs.

6 Customer service

Some operators in regions are new to the service industry, and customer service training is the first requirement. Additional training such as cultural awareness covering international visitor service expectations, particularly for Asian countries, is also needed.

Support Required

Raising the capability of the sector is a shared responsibility, with each stakeholder contributing their area of expertise. Key industry support agencies such as the Tourism Industry Council of South Australia, Regional Development Australia boards, Regional Tourism Organisations, the South Australian Tourism Commission, and local councils all have a role to play. Harnessing informal regional and operator networks is also essential for fostering peer-to-peer mentoring and support.

Leisure and business events

Events play an important role in the South Australian regional visitor economy. They are a great way to showcase the personality of a region, build community pride, develop social connections, and deliver revenue into the local economy.

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

Federal and State grants, local councils and Events South Australia provide funding support for a range of regional and community events. Local councils also provide substantial funding and other critical event delivery support.

Regional event priorities

Regions have identified the following key event priorities:

1 Create and support existing signature events

Signature events successfully showcase and celebrate a region's unique offerings. Examples include Port Lincoln's Tunarama and Adelaide Hills' Crush Festival. COVID-19 now requires events to be planned and delivered in a COVID-19 safe format. Adapting regional events to this changing environment provides an opportunity to celebrate smaller events that disperse visitors

throughout the region and extend the benefits more broadly. Prioritising events that are leisure-based and reflective of a region's authentic personality is important. Ongoing regional strategic event planning will help identify new events and adapt existing signature events for even greater success.

2 South Australia's major event collaboration

Overall, Regions believe that South Australia's major events calendar in Adelaide, including events such as Tasting Australia and cross regional border events, such as South Australian Living Artists Festival, Bay to Birdwood and Santos Tour Down Under, present the perfect hook for greater regional discovery. Collaboration within regions, event organisers and with the South Australian Tourism Commission is required to help entice visitors with regional packages and offerings for extended stays.



Adelaide Fringe Festival just celebrated 60 years of operation and is a major reason to visit Adelaide and then extend the trip into regions.



MIKKIRA STATION, MIKKIRA LANE, PORT LINCOLN

3 Building event capability

Regional events rely on passionate volunteers to ensure they are successful. A key priority is expanding the base of event volunteers and developing event management resources. Regions also believe that providing existing event organisers with new best practice event operations, marketing and risk management tools will help to raise regional event quality and capability.

4 Create and promote a region's annual event calendar

A calendar of events anchored around a signature event/s can drive year-round visitation, particularly during quieter months. The aim is 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

In partnership with the Adelaide Convention Bureau, many regions are well placed to attract more business events including meetings, incentives, and conferences by using existing regional infrastructure and operator conferencing facilities. Business events are a great way to drive more mid-week visitation and spend into a region. Intrastate business events are the most immediate opportunity with interstate a strong option in the medium term.



South Australia was recognised as Australia's Best Event State at the 2020 Australian Event Awards.

Promote the value of tourism

For tourism to truly bounce back from COVID-19, recent bushfires and drought, regions need to rally support for the tourism sector from all levels of government, the local community, industry, operators, partners, and visitors.

Tourism as a sector, needs to showcase its economic, social, cultural, and environmental value. As the central point in the visitor economy, tourism not only drives visitor dollars into local businesses but creates exciting career opportunities and jobs in regional communities. It also provides better infrastructure for local communities to enjoy and can play a role in protecting natural and man-made heritage assets that are appealing to visitors. Great places to live are also great places to visit.

Support required

To promote the value of tourism and its benefits to the regional visitor economy, regions need to:

- Engage with the local community about the benefits of tourism and on decisions relating to local tourism development opportunities.
- Foster local tourism ambassadors and visitor advocates.
- Engage and educate complementary government departments about tourism's value to the regional visitor economy.
- Preserve and celebrate a region's iconic cultural and environmental assets for the benefit of all.

- Support sustainable tourism development that is in keeping with a region's charm and character.
- Continually share data driven insights on tourism's value across economic, social, cultural, and environmental areas.

Enablers of the visitor economy

The 2030 South Australian Visitor Economy Sector Plan highlights a range of enablers that are needed to support the success of the visitor economy. These are areas of critical importance that are outside the control of direct stakeholders and require collaboration across different government agencies. Enablers include public infrastructure, labour and skills support and streamlining regulation. Tourism operators can be impeded by complex regulatory and legislative constraints. This can limit new tourism start-ups as well as existing operators' diversification or expansion plans.

Individual regional support required is detailed in the next section under experience and supply development or industry capability priorities. Achieving these enabler goals requires collaboration across multiple government agencies.



The 2030 target for regional tourism is \$5.1 billion in visitor expenditure.



Regional response priorities

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



Aquatic adventures



Beach / coastal



Camping



Caravanning



Cycling



Domestic visitors



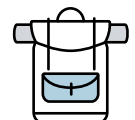
Family



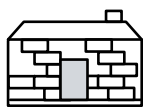
Fishing



Food, wine and beverages



Hiking



Historic



International visitors



Aboriginal experiences



Local produce



Nature / wildlife



Short drive
(close to Adelaide)



Long drive
(touring route)



Regional airport



Regional transport



Water experiences



Wellness



Adelaide Hills



VISITOR SPEND

\$170 million

EMPLOYMENT IN REGION

1300 direct + 400 indirect =

1700 jobs

1 in 18 jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	1,333,000	\$90m
Overnight	195,000	\$80m
OVERNIGHT SPLIT		
International	11,000	\$9m
Interstate	79,000	\$35m
Intrastate	105,000	\$35m

OCCUPANCY AND RATES

	ADELAIDE HILLS	REGIONAL AVERAGE
Occupancy	58%	51%
RevPAR (average yield of a hotel room)	\$96	\$76

773 tourism businesses

293 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Adelaide Hills priorities

Adelaide Hills' priority is to build a resilient and sustainable industry that capitalises on its proximity to Adelaide. The region aims to convert more visitors to stay overnight, encourage day trippers to linger longer, spend more and grow repeat visitation. Of key importance is understanding and meeting changing visitor needs via regional experiences, events and strong marketing in a post-bushfire and pandemic environment.

Marketing

- Grow visitors to the new Adelaide Hills website and use site data to better understand visitor behaviour.
- Leverage South Australian Tourism Commission's marketing initiatives to increase leads to local businesses.
- Provide locals with new reasons to explore their own region, which will then enhance the trips of their friends and relatives.
- Encourage greater mid-week visits from all groups (corporate, sporting and incentives) and regenerate interstate and international markets.
- Boost the promotion of experiences that best match changing visitor needs and are reflective of the Adelaide Hills Tourism Interpretative Plan key messages.
- Work collaboratively with the South Australian Tourism Commission's team to adapt visitor target markets and messages based on changing global and local pandemic responses.
- Work with StudyAdelaide to encourage international students to visit and bring their visiting families.

Experience and supply development

- Support the development of experiences that reflect the Adelaide Hills Interpretation Plan themes of food and beverage, towns and villages (including twilight activities), art, heritage and culture (including Aboriginal), nature and lifestyle (including soft adventure, wellness, hiking, cycling and horse riding).
- Support Department for Environment and Water initiatives such as the reinvigoration of Cleland Wildlife Park.
- Advocate for the development of 16 new rooms and 22 room upgrades by 2025.
- Encourage unique accommodation linked to trails, nature, wildlife, food, beverage, and wellness.
- Advocate for improved regional Wi-Fi and telephony connectivity.
- Address infrastructure including touring routes, scenic drives signage, walking and cycling trails and coach and car parking facilities.
- Address gaps in transport connectivity (e.g. ride sharing services and shuttles).



Jurlique founded their global brand in the region 35 years ago, firmly positioning the Adelaide Hills as a wellness hub.



Collaboration

- Encourage partnerships between local tourism operators via industry networking events, familiarisations, digital platforms, cross-promotion and bundling of commissionable visitor experiences.
- Implement the Visitor Information Services strategy and ensure changing visitor needs are being serviced by local tourism operators and across all digital platforms.
- Ensure Adelaide Hills is well represented on major cross-regional touring route promotions (e.g. Epicurean Way).
- Support cross-regional and cross-industry resilience and crisis management plans to minimise risks for operators and visitors.
- Collaborate with rail, cruise and other specialist tour operators to include Adelaide Hills as part of their extended itineraries or packages.

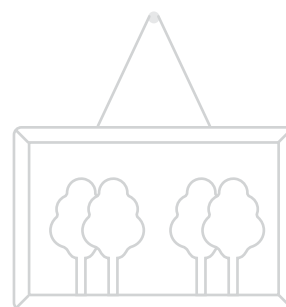
Industry capability

- Focus on building skills across digital marketing, customer service, experience development and distribution.

- Support industry resilience including developing business cases for grants and investment.
- Research and expand the health and wellbeing sector by becoming an incubator for State-wide industry development and positioning the region as a wellness hub.
- Advocate for a training centre to upskill local regional tourism and hospitality staff.

Leisure and business events

- Optimise major Adelaide and cross-regional events including Bay to Birdwood, Tasting Australia and Santos Tour Down Under.
- Embrace new wine events such as Chardonnay May and Sparkling Spring, existing signature wine events Crush Festival and Winter Reds, as well as exploring new agritourism, arts and wellness event opportunities.
- Drive greater mid-week opportunities from business meetings and events.
- Collaborate with Mount Barker District Council to attract events to the new recreation and leisure precinct.



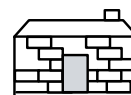
At The Cedars in Hahndorf, visitors can feel the presence of the famous artist Sir Hans Heysen in his studio, home and garden.

PARTNERS



Adelaide Hills Tourism, Adelaide Hills Council, Mount Barker District Council, Regional Development Australia Adelaide Hills, Fleurieu and Kangaroo Island, Stirling Business Association, Hahndorf Business and Tourism Association, Business Mount Barker, Adelaide Hills Wine Region, South Australian Tourism Commission, Tourism Australia, Tourism Industry Council SA, and sub-regional tourism, commerce groups and agricultural industry associations.

Barossa



VISITOR SPEND

\$235 million

EMPLOYMENT IN REGION

900 direct + 500 indirect =

1400 jobs

1 in 21 jobs
supported by the
tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	927,000	\$89m
Overnight	260,000	\$146m
OVERNIGHT SPLIT		
International	14,000	\$8m
Interstate	96,000	\$84m
Intrastate	150,000	\$54m

OCCUPANCY AND RATES

	BAROSSA	REGIONAL AVERAGE
Occupancy	59%	51%
RevPAR (average yield of a hotel room)	\$105	\$76

359 tourism businesses

502 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Barossa priorities

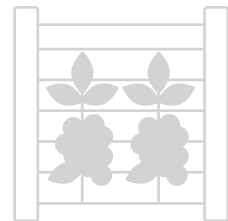
The main priority for driving future growth to the Barossa is to continue to increase overnight visitation from intrastate, interstate, and overseas markets focusing on refreshed and new unique accommodation offerings and visitor experiences. While the region receives 3.5 day trip visitors for every overnight visitor, overnight visitors deliver nearly two thirds of total visitor spend.

Marketing

- Leverage the Barossa's strong brand position as a global wine, culinary and culture destination and grow messaging around wine experiences, provenance dining, regional food, art, history, nature, family, and wellness experiences.
- Adapt marketing towards the most relevant post COVID-19 international visitor markets in alignment with South Australian Tourism Commission's and Tourism Australia's priorities.
- Leverage intrastate, interstate, and trans-Tasman promotion of the Barossa's distinctive European cultural connections and appeal.
- Leverage global marketing platforms such as Ultimate Winery Experiences and Great Wine Capitals of the World for promotion of the region's unique offering.
- Position Barossa as a great base for exploring wine, food, and leisure experiences across the southern part of the State.

Experience and supply development

- Increase the Barossa's bookable tourism experiences available via key distribution channels.
- Leverage the region's global wine and wine tourism reputation and develop new wine experiences that include education, digital technologies, enhanced storytelling, and visitor immersion.
- Expand tourism experience offerings with digital technologies that engage and inform.
- As a boutique region with strong accommodation yields and high weekend occupancy, there is an opportunity to expand the region's experiential offerings across nature and wellness.
- 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 45 new and 41 upgraded rooms (from 3 to 4-star) by 2025 that complement Barossa's culture and heritage.
- Review and simplify visitor wayfinding including signage to and around the Barossa.
- Leverage the region's cycling and walking infrastructure and intersection of key trails for investment and activation.



The Barossa is home to some of the world's oldest shiraz grapes.



Collaboration

- Continue collaboration with the state's key tourism, business, event organisations and community to ensure a cohesive approach to promotion and visitor attraction.
- Leverage the Epicurean Way touring route with investment, experience development and linkages with cycle and walking paths as a cross-regional marketing platform to attract self-drive food and wine travellers.
- Support the Visitor Information Servicing model to meet changing visitor needs in person and online.
- Build collaboration around a cross-regional event strategy to build scale, impact, resilience, and capability.
- Prioritise the Adelaide Wine Capital Cycle Trail Project as a cross regional globally significant tourism asset.
- Build tourism links across and between regions to encourage extended visitor nights.

Industry capability

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

- Prioritise hospitality, events and tourism careers and incentives to build a sustainable regional workforce for the future.

Leisure and business events

- Work towards greater overnight stays from events by positioning the Barossa as Australia's premium regional events destination with great accessibility from Adelaide.
- Increase overnight visitors coming for business events and mini-festivals to fill mid-week occupancy and drive visitor spend.
- Build on the region's two largest food and wine festivals (Barossa Vintage Festival and Barossa Food Festival) to grow length of stay and visitor spend.
- Work with the Adelaide Convention Bureau to build the funding, resources, and capabilities of businesses in Barossa to attract meetings, events, conferences, and incentive trips.
- Support sporting and recreational events for community and visitor economy benefits, including ongoing activation of cycle tourism.

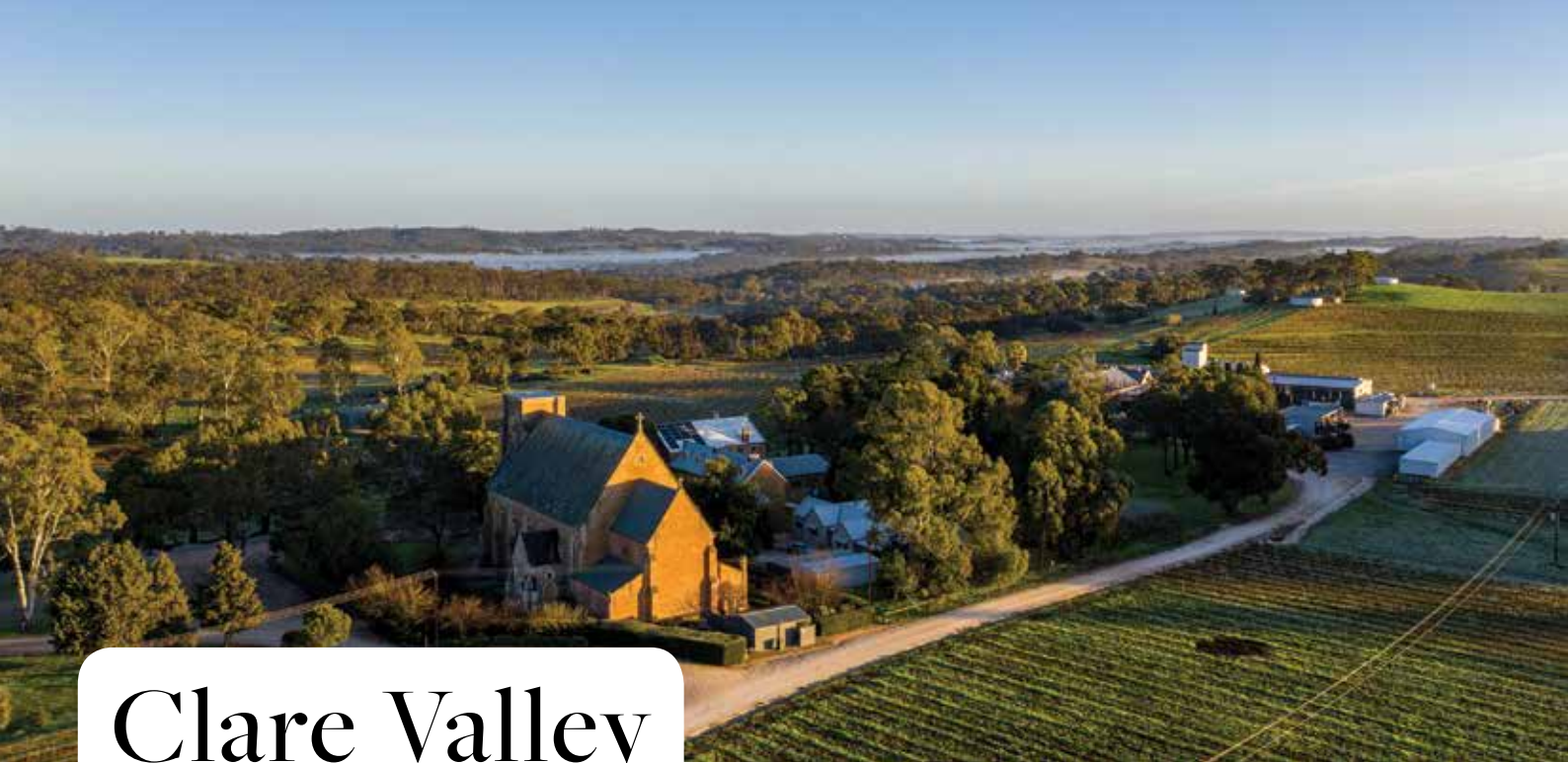


The Barossa is less than an hour's drive from Adelaide and home to more than 80 cellar doors.

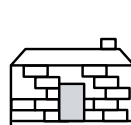
PARTNERS



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



Clare Valley



VISITOR SPEND

\$90 million

EMPLOYMENT IN REGION

500 direct + 200 indirect =

700 jobs

1 in 13
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	303,000	\$28m
Overnight	186,000	\$62m
OVERNIGHT SPLIT		
International	4,000	\$2m
Interstate	57,000	\$22m
Intrastate	125,000	\$38m

OCCUPANCY AND RATES

	CLARE VALLEY	REGIONAL AVERAGE
Occupancy	65%	51%
RevPAR (average yield of a hotel room)	\$84	\$76

193 tourism businesses

237 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Clare Valley priorities

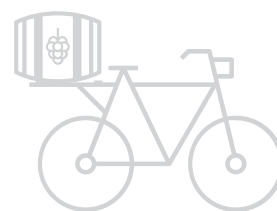
Building off the region's strong self-drive visitor market, the focus for the Clare Valley is to encourage high spending interstate and international visitors to stay overnight in the region. Developing sustainable and commissionable nature-based, heritage, wellness and epicurean visitor experiences and additional quality accommodation will be key.

Marketing

- Position the region as authentically Australian: offering epicurean, nature-based, wellness, outback, and heritage experiences.
- Market the Clare Valley to those intrastate, interstate, and international visitors seeking either an active or indulgent holiday.
- Grow the region's marketing impact and leads to operators by aligning with South Australian Tourism Commission's digital and other marketing strategies.
- Ensure Clare Valley's Breathe It In messaging is across all communication with fresh visual assets.
- Develop and expand experiences around the touring routes that support dispersal through regions and appeal to the self-drive market.
- Increase the number of commissionable visitor experiences in the region.
- Develop more experiential accommodation offerings linked to local farms and vineyards.
- Aim to develop 19 new and 14 upgraded rooms (from 3 to 4-star) in the region by 2025.
- Encourage the development of a boutique 6-star offering.
- Improve the ongoing maintenance of key heritage assets such as Burra Cultural Centre and Martindale Hall.

Experience and supply development

- Use the region's excellent network of trails for the development of new soft adventure, wellness, and Aboriginal tourism experiences.
- Develop more authentic food and wine visitor experiences that lend to the local agricultural industry, while enhancing existing offerings.
- Develop an aviation tourism strategy for the region to encourage visitors to arrive via helicopters and small planes.
- Make nature-based assets more accessible via the provision of amenities and signage.
- Significantly improve telecommunications.
- Improve the capture of regional visitor spend information to support future tourism investment.
- Create opportunities for in-region operators to collaborate and package together to increase nights in region.



The Clare Valley's Riesling Trail was one of the first rail-trails to be developed in South Australia. It runs for 35 kilometres.



Collaboration

- Continue to develop strengthened linkages between local councils and tourism associations.
- Build stronger connections with neighbouring regions such as Yorke Peninsula, Barossa, Riverland, and Southern Flinders Ranges.
- Continue to leverage the Explorers Way and Epicurean Way touring routes as marketing platforms for the region and grow stopovers to the Clare Valley from those heading to and from the Flinders Ranges and Outback.
- Continue to evolve regional Visitor Information Services in Clare Valley, Goyder, and Port Wakefield and strengthen the region's capacity to meet visitor information needs where and when they seek it.

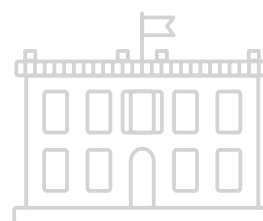
Industry capability

- Raise industry capability in digital marketing, customer service, event management, event promotion, tour guiding and commissionable products.

- Explore ways to attract and retain quality staff in the regions (especially chefs and front-of-house staff).
- Explore potential rideshare partnerships (e.g. Uber) to improve transport services available in the region.
- Invest in future tourism leaders through youth initiatives.

Leisure and business events

- 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.
- Drive in-region dispersal via flagship events such as Clare Valley Gourmet Weekend and the SA Autumn Garden Festival, as well as developing new events.



Martindale Hall was part of the setting for Peter Weir's 1975 film *Picnic at Hanging Rock*.

PARTNERS



Regional Development Australia Yorke and Mid North, Clare and Gilbert Valleys Council, Regional Council of Goyder, Wakefield Regional Council, , Clare Valley Wine and Grape Association, Clare Valley Business and Tourism Association and South Australian Tourism Commission.



Eyre Peninsula



VISITOR SPEND

\$400 million

EMPLOYMENT IN REGION

2100 direct + 800 indirect =

2900 jobs

1 in 13 jobs
supported by the
tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	524,000	\$104m
Overnight	470,000	\$296m
OVERNIGHT SPLIT		
International	20,000	\$9m
Interstate	118,000	\$87m
Intrastate	332,000	\$200m

OCCUPANCY AND RATES

	EYRE PENINSULA	REGIONAL AVERAGE
Occupancy	50%	51%
RevPAR (average yield of a hotel room)	\$59	\$76

585 tourism businesses

304 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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 domestic and international visitors. The region has approximately 100 State, National and Conservation Parks, ten State Marine Parks, and three Commonwealth Marine Reserves. A whole of tourism approach is needed across marketing, events, product development, council collaboration and investment.

Marketing

- Improve the region's digital presence and align this with South Australian Tourism Commission's digital efforts.
- Increase promotion of the region's competitive strengths and new offerings (coastal, wildlife, seafood, soft adventure, outback, Aboriginal experiences, and astrotourism).
- Promote different seasonal wildlife and nature occurrences across the whole year.
- Grow select smaller higher yielding cruise visitation and capture greater onshore regional spend.
- Capitalise on the region's appeal and growth potential from relevant South Australian Tourism Commission international market priorities.
- Develop a regional brand strategy that identifies and communicates the unique qualities of the Eyre Peninsula including the Seafood Frontier brand.
- Embrace the evolution of the Seafood Frontier brand for those experiences related to coastal Eyre Peninsula.
- Build the region's accommodation yields by aiming to develop 63 new rooms and upgrade 133 rooms (from 3 to 4-star) by 2025, especially in more remote locations.
- Encourage the development of sustainable 5 or 6-star accommodation in a national park or iconic natural location.
- Support the Eyes on Eyre project, which includes camping infrastructure, regional trails, wayfinding and signage, Wi-Fi and visitor interpretation experiences.
- Maintain and enhance key coastal infrastructure and national parks including trails for walking and cycling and recreational fishing.
- Invest in infrastructure that supports the drive market and encourages overnight stays.
- Address reliability of water, energy supply and telecommunications for regional tourism related businesses.

Experience and supply development

- Create compelling new visitor experiences across coastal, wildlife, seafood, outback, soft adventure, astrotourism, and Aboriginal themes.
- Increase bookable products via travel intermediaries that help build the region's profile domestically and internationally.



In early May, the Head of Bight becomes a nursery for calving Southern Right Whales.



Collaboration

- Develop the region's network of visitor information services to meet changing consumer behaviour and digital needs.
- Build on existing partnerships and collateral to drive dispersal to inland and outback Eyre Peninsula.
- Continue working with aviation partners to deliver flexible and affordable access to the region for business and leisure travellers and regain lost COVID-19 capacity and loads.
- Increase visitation along the Seafood Frontier touring route and foster dispersal from the route to other parts of the region including inland.
- Increase collaboration and alignment of activities across the three tiers of Federal, State, and local government including Regional Development Australia Eyre Peninsula led projects for greater impact.

Industry capability

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

Leisure and business events

- Create an event strategy to support, develop and attract events that are fitting to the character and aspirations of the region and build a balanced portfolio of signature events.
- Grow existing signature events such as Tunarama, and create new community events to attract new visitors and increase length of stay and visitor spend.
- Build regional event resourcing to support this event strategy.



Coffin Bay is home to the world-famous Coffin Bay oyster.

PARTNERS



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



Fleurieu Peninsula



VISITOR SPEND

\$493 million

EMPLOYMENT IN REGION

3300 direct + 1300 indirect

4600 jobs

1 in 8 jobs supported by the tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	2,912,000	\$230m
Overnight	772,000	\$263m
OVERNIGHT SPLIT		
International	27,000	\$13m
Interstate	139,000	\$73m
Intrastate	06,000	\$177m

OCCUPANCY AND RATES

	FLEURIEU PENINSULA	REGIONAL AVERAGE
Occupancy	50%	51%
RevPAR (average yield of a hotel room)	\$65	\$76

836 tourism businesses
743 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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 and local residents, as well as convert some day trips into overnight stays. Levers include events, accommodation improvements, experience development and marketing.

Marketing

- Make the region known as a place for outstanding food and drink, adventure, arts, culture, wellness and nature and water-based experiences.
- Build awareness of the Fleurieu Peninsula's all-year, all-week visitor appeal based on its climate and proximity to Adelaide.
- Develop stakeholder marketing collaborations with a focus on digital.
- Generate increased spend from the region's large day-tripper, local residents, holiday home users and visiting friends and relatives' markets.
- Explore ways to attract new market segments and adapt to changing visitor needs from existing markets.
- Align the region's marketing activities with those of the South Australian Tourism Commission and Tourism Australia.

Experience and supply development

- Enhance existing experiences with a focus on food and drink, adventure, nature and wildlife, arts and culture, wellness, coastal and aquatic themes.
- Support operators to form partnerships and package their experiences and become online bookable and commissionable.
- Develop new and existing Aboriginal experiences.
- Support tourism developments which match the aspirations of their communities.
- Encourage a diverse range of enhanced accommodation including 71 new rooms and 47 room upgrades.
- Develop appealing nature-based walking and cycling trail infrastructure.
- Strengthen the region's retail experience with a focus on creating vibrant main street precincts to enhance the visitor experience.



Victor Harbor is home to the horse-drawn tram across a 630m causeway to Granite Island.



Collaboration

- Foster collaboration between councils and other stakeholders to strengthen the region's coastal areas for business development and improved visitor experience.
- Encourage closer interaction between experience and accommodation providers to increase visitor length of stay.
- Strengthen collaboration between industry associations and other stakeholders across marketing, development and building industry capability.
- Collaborate with other regions and experiences along established touring routes (Epicurean Way, Southern Ocean Drive and Mighty Murray Way) to strengthen the regions' appeal to the growing drive tourism market.
- Build on the collaboration between Fleurieu Peninsula Tourism and the region's Visitor Information Centres to cross-sell the region, increase visitor spend and support local businesses.

Industry capability

- Grow industry capability in digital marketing and general business skills.
- Improve customer service standards at all points along the visitor journey with a focus on hospitality and retail.
- Mentor and support operators to increase market share in international markets when possible and meet the needs of new residents from those markets.
- Promote better links between tourism businesses and regional suppliers.

Leisure and business events

- Address the challenges related to sustaining existing and developing new events.
- Seek ways to improve a balance of the region's rich but fragmented events calendar.
- Support events which foster discovery, repeat visitation, or overnight stays and showcase the region's unique offerings.
- Leverage the region's proximity to major events taking place in Adelaide for additional visitation.



McLaren Vale is known as a leader in sustainability best practice for grape growers and winemakers.

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, Regional Development Australia Adelaide Hills, Fleurieu and Kangaroo Island and South Australian Tourism Commission.



Flinders Ranges and Outback



VISITOR SPEND

\$459 million

EMPLOYMENT IN REGION

2400 direct + 1300 indirect

4600 jobs

1 in 12
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	631,000	\$90m
Overnight	796,000	\$370m
OVERNIGHT SPLIT		
International	45,000	\$15m
Interstate	234,000	\$132m
Intrastate	517,000	\$223m

OCCUPANCY AND RATES

	FLINDERS RANGES & OUTBACK	REGIONAL AVERAGE
Occupancy	42%	51%
RRevPAR (average yield of a hotel room)	\$52	\$76

511 tourism businesses

277 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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, Aboriginal experiences, and local characters in the region.
- Develop a social media strategy for the region that leverages South Australian Tourism Commission's digital strategy and grows operator leads.
- Maximise the region's appeal to the domestic self-drive visitor and to European and North American markets (e.g. Explorers Way, Aboriginal tourism and World Heritage Bid).
- Leverage the growing interest in nature-based activities such as walking and cycling trails, focusing on the Southern Flinders Ranges Precinct and the Flinders Ranges.
- Promote the Aussie Travel Code which raises awareness around respect of the natural environment, local community, pastoral and traditional owners.
- Explore new experience opportunities that connect with natural landscapes such as Kati Thanda-Lake Eyre, astrotourism and significant cultural sites.
- Work with Department for Environment and Water to support and promote the Ediacara fossil experience at Nilpena.
- Foster the continued development of Station Stays concept across the region's network of pastoral tourism properties.
- Build the region's accommodation yields by aiming to develop 100 new rooms and upgrade 134 rooms (from 3 to 4-star) by 2025.
- Address the reliability of water and energy supply for regional tourism businesses.
- Advocate for significant improvements in telecommunication black spot areas.
- Support improved road maintenance and road closure procedures.
- Address outback airstrips maintenance and upgrades for tourism including William Creek and Oodnadatta.
- Advocate for the sealing and ongoing maintenance of the Birdsville Track and Oodnadatta Track.

Experience and supply development

- Develop new and improve existing visitor experiences which reflect the region's strengths in nature-based, Aboriginal, pastoral, heritage, and soft adventure tourism.



Marree is home to the famous Australasian Camel Cup.



Collaboration

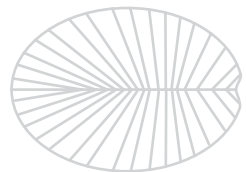
- Create promotional partnerships with the caravan and camping sector peak bodies.
- Increase the effectiveness of the region's Visitor Information Centres and outlets including digital capabilities and on-selling services.
- Support the Flinders Ranges World Heritage bid.
- Leverage and collaborate more with other touring routes (e.g. Heritage Rail Trail, Epicurean Way Seafood Frontier, Silver 2 Sea Way, and the Outback Loop).
- Use the Explorers Way as a platform for marketing, product, and infrastructure development.
- Encourage greater cross-council, government, and agency collaboration.
- Create tourism partnerships with neighbouring regions, States and Territories to drive visitation and promotion.
- Provide greater support and collaboration for Aboriginal tourism.

Industry capability

- Raise industry capability in digital marketing, tour guiding, events management, and customer service.
- Create ways of providing advice and support to organisers of smaller events.
- Provide mentoring and skills training for nature-based, Aboriginal, pastoral, heritage and soft adventure operators.

Leisure and business events

- Address event challenges (distance from target markets, maintaining volunteers) to create operational efficiencies and capability.
- Support the region's hero events and create new ones in the outback.
- Collaborate with cross-regional events (e.g. South Australian Living Artists Festival, Tasting Australia) and iconic events (e.g. Birdsville Races, Finke Desert Race).
- Support unique events such as water-events on Kati Thanda-Lake Eyre.



Over 500 million years old, the Ediacaran fossils were first discovered in 1946 by geologist Reg Sprigg, the founder of the Arkaroola Wilderness Sanctuary.

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 South Australian Tourism Commission.

Kangaroo Island



VISITOR SPEND

\$141 million

EMPLOYMENT IN REGION

900 direct + 300 indirect =

1,200 jobs

1 in 3 jobs
supported by the
tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	72,000	\$11m
Overnight	172,000	\$130m
OVERNIGHT SPLIT		
International	47,000	\$38m
Interstate	53,000	\$46m
Intrastate	72,000	\$46m

OCCUPANCY AND RATES

	KANGAROO ISLAND	REGIONAL AVERAGE
Occupancy	57%	51%
RevPAR (average yield of a hotel room)	\$176	\$76

115 tourism businesses

223 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Kangaroo Island priorities

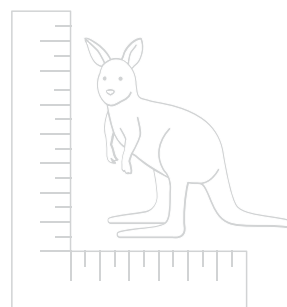
After the devastating summer 2020 bushfires in which more than 40% of Kangaroo Island was impacted, the Island's priority is industry resilience and regrowth. As an established visitor region, the focus for Kangaroo Island has always been about exceeding on visitor expectations, growing visitor yield, dispersal and managing the sustainable development of tourism on the Island. With highly seasonal visitation, encouraging visitation in the quieter months of May to August continues to be a priority.

Marketing

- Promote Kangaroo Island as an all-year destination with a reinforced winter message.
 - Provide a greater focus on the domestic market while maintaining international market engagement.
 - Explore new international market opportunities such as New Zealand.
 - Continue to build the profile of the Island's artisan producers, wine and other beverage makers and artists.
 - Promote Kangaroo Island's brand essence of immersive nature and wildlife encounters and seasonal natural occurrences.
 - Cross promotion of local businesses and local produce.
 - Align digital marketing efforts with the South Australian Tourism Commission and Tourism Australia to maximise operator leads.
- Establish ways to capture and track the Island's total bed capacity more accurately.
 - Foster the development of 58 new rooms and upgrading of at least 32 rooms (from 3 to 4-star) by 2025.
 - Explore potential internal Island transport links for visitors.
 - Advocate for significant improvements in telecommunication black spot areas.
 - Advocate for improvements to tourism infrastructure. This includes the installation of roadside stopping bays for wildlife/nature encounters and coastal jetties.
 - Support infrastructure and experience development in the main hubs such as Kingscote, American River, Penneshaw and Parndana.
 - Ensure land and sea access to Kangaroo Island remains competitive and delivers on visitor requirements.
 - Together with the South Australian Tourism Commission and Kangaroo Island Council work to attract and retain regular air services to the Island.
 - Advocate for improved and well-maintained marine infrastructure that supports consistent and safe ferry services.

Experience and supply development

- Develop and activate nature trails year-round to cater to soft adventure activities.
- Support operators to continue in the winter months.
- Develop and support dining options and encourage the use of local produce on menus.



Kangaroo Island is approximately 145 km long and 90 km wide and is Australia's third largest Island.



Collaboration

- Increase visitor information services across the Island.
- Utilise operators and locals better as visitor information ambassadors.
- Champion for inclusion in Tourism Australia's Signature Programs.
- Use the Southern Ocean Drive as a platform for marketing and cross-regional collaboration.
- Explore collaborative marketing opportunities with other regions.
- Collectively monitor the cruise market's sustainability while delivering on cruise visitor expectations.
- Generate Island wide collaboration to rebound and grow sustainably.
- Work with Department for Environment and Water to support Kangaroo Island Fire Recovery Projects.

Industry capability

- Explore ways to attract and retain skilled workers.

- Improve operator capabilities in digital marketing, storytelling, and international product and distribution.
- Maintain support for Tourism Optimisation Management Model (TOMM) data collection and its use for decision making.
- Work with industry to be travel trade-ready.
- Provide support to tourism businesses to help adjust product that will appeal to the domestic market.

Leisure and business events

- Support signature events (e.g. Kangaroo Island Racing Carnival, Marathon), and smaller established events.
- Leverage major mainland events to encourage visits to Kangaroo Island.
- Prioritise new leisure events that are low-impact, spread throughout the year and reflect the Island's brand positioning.
- Package and promote the island to the domestic business events sector.



Kangaroo Island has the world's purest strain of disease-free Ligurian bees.

PARTNERS



The key stakeholders are Kangaroo Island Tourism Alliance (formerly known Kangaroo Island Tourism Food Wine and Beverage Association), Department for Environment and Water, Regional Development Australia Adelaide Hills, Fleurieu and Kangaroo Island, Kangaroo Island Council and South Australian Tourism Commission.

Limestone Coast



VISITOR SPEND

\$370 million

EMPLOYMENT IN REGION

2100 direct + 900 indirect

3000 jobs

1 in 16 jobs
supported by the tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	762,000	\$107m
Overnight	688,000	\$263m
OVERNIGHT SPLIT		
International	44,000	\$18m
Interstate	289,000	\$113m
Intrastate	355,000	\$132m

OCCUPANCY AND RATES

	LIMESTONE COAST	REGIONAL AVERAGE
Occupancy	45%	51%
RevPAR (average yield of a hotel room)	\$53	\$76

767 tourism businesses

429 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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, local food and wine experiences and culture (including heritage and Aboriginal experiences) and building on the regional brand.
- Promote the State's only World Heritage site, the Naracoorte Caves, and other significant sites such as the Blue Lake, as part of the visitor experience.
- Raise the region's digital marketing footprint and align with the South Australian Tourism Commission's digital efforts to increase leads to operators.
- Promote the region's winter visitor experiences including events.
- Maintain the focus on attracting families, as well as young and older couples to visit the region.
- Continue to embrace the growing caravan and camping market as well as sports tourism, group touring and cruise ship visitation.

Experience and supply development

- Create new experiences and increase the number of commissionable products to build the region's profile domestically and internationally.
- Develop hero coastal and soft adventure offerings with a focus on nature-based experiences such as hiking and cycling trails.
- Continue to develop experiences that reflect the regions strengths, such as unique landscapes, wildlife, local food and wine and culture (including heritage and Aboriginal experiences).
- Package existing operator experiences to drive visitation and dispersal through to the region.
- Grow the region's accommodation yields by fostering the development of 68 new rooms and upgrade 202 rooms (from 3 to 4-star) by 2025. Quality and experiential accommodation of scale is needed across the region's winery and coastal communities.
- Prioritise the enhancement of infrastructure around the region's nature-based assets.
- Improve ongoing maintenance of key coastal infrastructure (jetties and boat ramps).



The Naracoorte caves is South Australia's only World Heritage site.



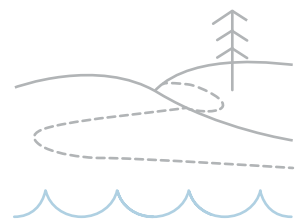
Collaboration

- Borderless collaboration with operators, councils and regions is required across the Melbourne to Adelaide touring route (Southern Ocean Drive) to cross-promote and package existing experiences.
 - Continue to evolve visitor servicing by providing excellent face to face and digital solutions to match changing visitor needs.
 - Leverage the Limestone Coast Wine Trails website to encourage improved collaboration throughout the region and into neighbouring Victoria.
- Address the shortage of tourism workers especially seasonal workers and event volunteers.
 - Improve industry capability to cater to the emerging international self-drive visitor market.
 - Support operators to list on the Australian Tourism Data Warehouse.

Leisure and business events

Industry capability

- Raise industry capability in digital marketing, customer service and understanding tourism distribution systems.
 - Use the region's network of 24 industry associations to train and educate operators.
 - Improve event capability via regional event development workshops.
- Identify gaps and seek opportunities to host events that complement the regional calendar and brand.
 - Strengthen the coordination and promotion of small-scale events in region (Coonawarra Cabernet Celebrations, Generations in Jazz, Robe Home-Brew Festival, Bay Escape, Mega Fest, Diesel and Dirt.)
 - Capitalise on pre and post event visitors from larger events taking place in Adelaide and Melbourne.
 - Refresh existing events to meet changing consumer expectations.
 - Build a regional proposition to attract corporate and business travellers and establish a regional business bureau.



With its spectacular natural wonders, the Limestone Coast is a perfect holiday spot for families touring the Southern Ocean Drive.

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 South Australian Tourism Commission.



Murray River, Lakes & Coorong



VISITOR SPEND

\$192 million

EMPLOYMENT IN REGION

1300 direct + 500 indirect

1800 jobs

1 in 13
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	976,000	\$79m
Overnight	368,000	\$113m
OVERNIGHT SPLIT		
International	10,000	\$6m
Interstate	78,000	\$30m
Intrastate	280,000	\$77m

OCCUPANCY AND RATES

	MURRAY RIVER, LAKES AND COORONG	REGIONAL AVERAGE
Occupancy	54%	51%
RevPAR (average yield of a hotel room)	\$58	\$76

308 tourism businesses

212 businesses listed on Australian
Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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 predominantly a self-drive visitor market, leveraging existing touring routes and promoting and developing events and tourism experiences that reflect the region's uniqueness will be key.

Marketing

- Strengthen the region's position as a vibrant destination with a diverse range of experiences on offer including nature and water-based experiences.
- Increase the region's digital marketing and leads to operators and ensure alignment with South Australian Tourism Commission's digital strategy.
- Maximise the region's promotions to the self-drive and boating tourism markets.
- Leverage the regions emerging and hero experiences including the Murray Coorong Trail, River Murray International Dark Sky Reserve, Monarto Safari Park and The Bend Motorsport Park's all-year program.
- Continue to promote and grow caravan and camping visitors to the region.
- Increase the promotion of the highly appealing and rejuvenated river shack and houseboat experience.
- Boost the promotion of heritage and cultural tourism experiences in the region.
- Educate visitors on their contribution to sustainable tourism including respect for culture, community, and the environment.

Experience and supply development

- Use the region's new and emerging hero products (The Bridgeport Hotel, the Bend Motorsport Park, Monarto Safari Park and River Murray International Dark Sky Reserve) to develop complementary experiences.
- Develop new and enhance existing Aboriginal and agritourism experiences.
- Develop new on-water experiences and improve river infrastructure including navigational aids, moorings, boat washing facilities and other visitor amenities.
- Create new signature nature-based visitor experiences at the Lower Lakes and northern ends of the region.
- Develop complementary nature-based operator experiences to support the Murray Coorong Trail.
- Foster the development of 26 new rooms and the upgrade of 66 rooms (from 3 to 4-star) by 2025. Encourage experiential accommodation across the region. This includes houseboats, river shacks, camping, glamping, and star-rated accommodation.
- Encourage investment in caravan parks to upgrade and include more cabins and family-friendly amenities.
- Develop new infrastructure and accommodation around the River Murray International Dark Sky Reserve.



The first paddle steamer on the Murray River was the Mary Ann in 1853.



Collaboration

- Collaborate with the region's five neighbours on the Southern Ocean Drive and Mighty Murray Way touring routes to package and better promote tourism products across borders.
- Encourage the region's Visitor Information Centres and outlets to expand their role as accessible touchpoints with exceptional service for visitors.
- Seek ways to calculate traffic flows and visitation to the region to assist planning and business cases for investment.
- Work with regional operators that are members of the Adelaide Convention Bureau and promote the region as a pre-and post-convention touring opportunity.
- Leverage private and public sector support for regional research studies.
- Embrace more Aboriginal storytelling as part of the regions marketing messaging and experiences.

Industry capability

- Raise industry capability in the areas of digital marketing, online bookings and distribution, business management, hospitality, customer service and virtual tourism.
- Increase operator take-up of free Australian Tourism Data Warehouse listings.
- Attract more skilled tourism workers into the region.

Leisure and business events

- Address visitor seasonality by working with the region's strong calendar of events and expand seasonal fringe opportunities.
- Explore the opportunity to grow corporate and business events utilising existing operators' facilities.
- Create aligned events across the region (e.g. The Bend and Monarto Safari Park) to drive greater reasons to visit and stay overnight.
- Support recreational local and/or state sporting events.



The Coorong is recognised under the Ramsar Convention as a wetland of international importance.

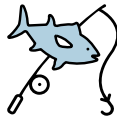
PARTNERS



The key stakeholders are the Murray River, Lakes and Coorong Tourism Alliance; Regional Development Australia Murraylands and Riverland ; 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 South Australian Tourism Commission.



Riverland



VISITOR SPEND

\$183 million

EMPLOYMENT IN REGION

1100 direct + 500 indirect =

1600 jobs

1 in 15 jobs
supported by the tourism industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	383,000	\$35m
Overnight	415,000	\$147m
OVERNIGHT SPLIT		
International	9,000	\$7m
Interstate	92,000	\$47m
Intrastate	313,000	\$93m

OCCUPANCY AND RATES

	RIVERLAND	REGIONAL AVERAGE
Occupancy	44%	51%
RevPAR (average yield of a hotel room)	\$48	\$76

348 tourism businesses

210 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

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: increased collaboration, growing events, creating new visitor experiences, and supporting operators.

Marketing

- Based on the Riverland Tourism Plan, promote the region's emerging and core strengths around nature-based tourism experiences, food, wine, local producers, and unique accommodation.
- Maximise the region's drive tourism appeal from intrastate and interstate visitors and continue to focus on growing future visitors from New Zealand, UK/Europe and North America with inspiring itineraries and greater depth of content about the region's offerings.
- Align the region's digital efforts with South Australian Tourism Commission's digital marketing to drive more operator leads.
- Increase alignment and collaboration of regional, council and town level marketing activities for greater impact, including the use of expanded visitor itineraries to encourage longer stays and visitor spend.
- Use repeat visitors and the Riverland Ambassador Program to champion storytelling and information about the region to encourage visitation from family and friends.

Experience and supply development

- Extend the range of family-friendly soft adventure, water, and nature-based activities in the region.
- Build on the region's growing food and beverage reputation by developing more products and experiences in this space.
- Upgrade and develop 40 new rooms across experiential eco-friendly accommodation such as houseboats, caravan parks and luxury offerings. Build upon the region's low accommodation yield by upgrading 69 rooms (from 3 to 4 star) by 2025.
- Improve signage outside of major towns that are located on the edge of the highways and interpretive signage within the region.
- Develop more infrastructure to support nature-based tourism in the region's national parks.
- Maintain river infrastructure for newer houseboats including the slipway.



The Riverland is home to the oldest known Indigenous site: a midden of mussel shells that is at least 29,000 years old.



Collaboration

- Use the Mighty Murray Way touring route for marketing and collaboration across the two South Australian river regions. Encourage operators, associations, and councils to work together to package experiences and itineraries that meet visitor's needs.
- Encourage collaboration between the region's Visitor Information Centres and outlets to adapt to changing visitor information servicing needs across both digital and face to face channels to drive greater spend and length of stay in the region.
- Support a strategy with other states to promote the Murray River as a national and international icon.
- Connect, collaborate, and embrace more Aboriginal storytelling as part of the regions marketing messaging and experiences.

Industry capability

- Raise industry capability in digital marketing, customer service, food and beverage delivery and use of local produce, and writing grant applications.

- 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.
- Work on attracting more skilled tourism workers to the region.

Leisure and business events

- Focus on growing existing consumer events (e.g. Riverland Wine and Food Festival) to drive greater spend in the region.
- Coordinate local council event resources better and improve impact, timing, and greater visitor awareness of the entire region's event program.
- Encourage use of the Riverland event management system by industry.
- Explore the potential to grow business events using existing facilities to boost mid-week and low season visitation.



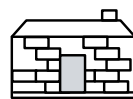
The Renmark Hotel was the first community hotel in the British Empire, established in 1897.

PARTNERS



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

Yorke Peninsula



VISITOR SPEND

\$220million

EMPLOYMENT IN REGION

1400 direct + 600 indirect =

2000 jobs

1 in 11
jobs
supported
by the
tourism
industry

POTENTIAL



VISITORS

	VISITS	EXPENDITURE
Day trips	727,000	\$58m
Overnight	565,000	\$162m
OVERNIGHT SPLIT		
International	8,000	\$4m
Interstate	63,000	\$21m
Intrastate	494,000	\$138m

OCCUPANCY AND RATES

	YORKE PENINSULA	REGIONAL AVERAGE
Occupancy	38%	51%
RevPAR (average yield of a hotel room)	\$40	\$76

428 tourism businesses

697 businesses listed on Australian Tourism Data Warehouse (ATDW)

Sources: International Visitor Survey, National Visitor Survey, Tourism Research Australia December 2019, STR Global, Australian Tourism Data Warehouse, Australian Bureau of Statistics, Regional Tourism Satellite Accounts 2018-19

Yorke Peninsula priorities

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

Marketing

- Create awareness of Yorke Peninsula's accessibility, open space, and coastal landscapes with a focus on nature, wildlife, aquatic, Aboriginal, agritourism, art and heritage experiences.
- Target the intrastate and interstate drive markets via the Coastal Way touring route and other drive itineraries.
- Communicate the region's coastal lifestyle, vast variety of accommodation options, wildlife, produce and events to encourage greater interstate visitation and cross-regional exploration.
- Align the region's digital efforts with the South Australian Tourism Commission's digital marketing strategy and drive operator leads primarily through the Australian Tourism Data Warehouse.

Experience and supply development

- Encourage new operator experiences around potential gamechanger projects including Dhilba Guuranda-Innes National Park, Marna Banggara, Windara Reef, Walk the Yorke and Moonta Mines National Heritage Area.
- Create additional experiences and increase online bookable and commissionable products for the interstate and cruise markets.
- Increase dining options that celebrate and showcase seafood experiences and regional produce.
- Generate greater awareness and bookings for regional operators through the distribution system.
- Develop 32 new rooms around high-quality experiential accommodation and aim to upgrade 62 rooms (from 3 to 4 star) by 2025.
- Upgrade the accommodation options within the region's strong network of caravan parks.
- Maintain key coastal infrastructure such as jetties and boat ramps.
- Improve digital connectivity across the region.



Walk the Yorke provides more than 500 kilometres of continuous walking and cycling trails from Port Wakefield to Moonta Bay



Collaboration

- Evolve visitor information networks to meet changing visitor needs, drive greater dispersal and spend.
- Cluster operator experiences for marketing and travel trade purposes. Educate the industry on the benefits of packaging and collaboration.
- Activate the Coastal Way touring route to showcase a variety of local experiences and encourage dispersal and increased spend from repeat visitors.
- Rally local ambassadors and the community to promote the region to their families, friends, and networks.

Industry capability

- Raise industry capability across customer service and consistent standards of delivery, including opening hours.
- Attract, retain, and foster staff development to encourage a career in local tourism and hospitality.
- Advocate for funding opportunities for the tourism industry on Yorke Peninsula.

Leisure and business events

- Generate greater awareness of the region's calendar of events especially during low season.
- Promote new events and continue to build the appeal of the region's signature events (e.g. Kernewek Lowender, Yorke Peninsula Saltwater Classic, Yorke's Classic, Yorke Peninsula Field Days and Seafood on Spencer).
- Encourage longer stays from event visitors by showcasing the diversity of experiences on offer.
- Grow mass participation events using the region's strong sporting facilities.
- Create new leisure events and drive new business events across the region.



Moonta Mines National Heritage Area is amongst the most significant in Australia, illustrating the early mining mostly by Cornish immigrants.

PARTNERS



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



**LET'S BUILD A GREAT
FUTURE TOGETHER**

