Alexandrina Council

Tourism & Visitor Strategy
2017-2022

CONNECTING COMMUNITIES

Alexandrina
Connecting Communities

Strategic Management Plans
2017-26 Long Term Financial Plan
2016-25 Infrastructure & Asset Management Plan
2014-23 Community Strategic Plan

Alexandrina
Connecting Communities

Contents

ACKNOWLEDGEMENT OF COUNTRY

The Alexandrina Council and its communities acknowledge the Ngarrindjeri people as the traditional custodians of the lands and waters of our Council district.

Message from the Mayor

Tourism is a significant industry in the Alexandrina Council economy. Due to recent international exposure and its close proximity to Adelaide, the Fleurieu Peninsula is one of the most popular holiday destinations in South Australia. We welcome hundreds of thousands of people every year to our region to experience the lifestyle we enjoy every day.

Setting strategic direction for tourism industry growth is important to attracting new visitors to our region, while retaining current visitor numbers. We have a great opportunity to assist and support local businesses and business associations and improve economic development in the region.

The creation of the Tourism and Visitor Strategy strives to provide direction on how existing visitor numbers can be maintained and stimulated and how visitor spending can be increased. Key areas of development focus are identified to maintain competitiveness and increase business profitability.

Council aims to provide necessary conditions and surroundings in which tourism can flourish. The Strategy also looks to explore possible improvements in the way events are funded and supported.

A healthy, dynamic tourism economy with clear direction is required to achieve our goals. We want to create unique, memorable experiences for visitors and residents. The Tourism and Visitor Strategy will assist in supporting our vision of developing a sustainable, thriving economy.

Mayor Keith Parkes

Executive Summary

The South Australian Tourism Plan 2020 sets a bold target of increasing tourism visitor spend in the state from around $6 billion to $8 billion by December 2020. The Fleurieu Peninsula currently has the highest visitation of any other region in South Australia other than Adelaide reflecting the importance of the region to the achievement of state tourism targets.

The total number of visitors to South Australia for the year ending September 2015 was 6,080,000, of that Adelaide ranked number 1 visits and the Fleurieu ranked number 2, followed closely by Limestone Coast and the Flinders Ranges & Outback.

The Alexandrina Council area recorded the second highest number of visitor nights (after Onkaparinga) for councils on the Fleurieu Peninsula.

Tourism is a key driver of the Alexandrina economy. Setting strategic direction for tourism industry growth is vital to retaining the current visitor preference for the region, attracting new visitors and increasing spend in the region.

This Strategy has been developed to assist the following key partners to work together to deliver tourism outcomes for the region:

- Alexandrina Council: to guide its application of resources (staff and funding), and development of assets and services (Council as a tourism operator, infrastructure, tourism assets, visitor information services, events, planning and programs).

- Regional Tourism Organisations (Fleurieu Peninsula Tourism & Murray River Lakes & Coorong Tourism Alliance) and Regional Development Australia Adelaide Hills, Fleurieu & Kangaroo Island (input into planning and service delivery) neighbouring councils (collaborative projects and initiatives).

- Local tourism operators (opportunities for growth and new investment).

The key focus of this Strategy is to provide direction on how existing visitor numbers can be maintained and grown and on how visitor spend can be increased.

The Strategy:

- identifies key areas of focus for development of experiences to maintain competitiveness, address current gaps, increase

existing business profitability and diversification and drive new investment

- identifies current needs of existing businesses in terms of achieving business growth and increasing capacity and capability

- provides direction to tourism stakeholders in terms of aspirations for the sector for the next five years and setting of appropriate targets and measures

- aligns with key Alexandrina Council, regional stakeholder and South Australian Government plans and strategies encouraging a collaborative government, community and business approach to tourism in the region

- defines Council's role in delivering on tourism targets with particular focus on visitor information services, events and festivals, communications and marketing, industry support and development of partnerships

- identifies stakeholder aspirations, roles and responsibilities and promotes collaboration and engagement in implementing key initiatives.

Executive Summary (cont.)

Council's key stakeholders in the region are supportive of the development of a Strategy and of Council's proactive role in tourism. Miranda Lang, Executive Officer of Fleurieu Peninsula Tourism says,

"It is a pleasure to be part of the development process of Alexandrina Council's Tourism Strategy. Alexandrina Council is an integral part of the Fleurieu Peninsula's tourism offering.

The council area has a wide range of experiences that appeal to domestic and international visitors, including food, wine, arts, culture, heritage, history, nature, wildlife and coastal & aquatics.

With its close proximity to Adelaide, part of the Melbourne to Adelaide Touring Route and of course is en route to Kangaroo Island (coming from the east), this area makes it ideal for visitors to experience the best of South Australia.

The visitor economy is increasingly becoming more important in South Australia. Having Alexandrina Council take a proactive approach to implementing a tourism plan is a great reflection of recognising the potential and opportunities that tourism will bring to the region.

Fleurieu Peninsula Tourism looks forward to continuing to work in collaboration with Alexandrina Council to grow the local economy, support small businesses, and to position Alexandrina Council as a region that offers and delivers memorable tourism experiences."

Peter Calahan, representative of South Australian Tourism Commission (SATC) says,

"Alexandrina Council has an excellent reputation for its thorough and strategic approach to tourism. It's fortunate to be able to deploy a range of key tourism assets in a variety of appealing landscapes – the Murray River, Coorong, some key South Coast towns and beaches, the burgeoning Langhorne Creek wine tourism area and Strathalbyn with its village feel and antique shops.

Its consumer-facing tourism sector is in healthy shape – although capability-building work is always important for the many small new and existing businesses – and is backed by a network of suppliers of goods and services which together make a wider visitor economy spread across all parts of the council area and well beyond the classic tourism nodes.

All of these factors place Alexandrina in a strong position amongst councils in regional South Australia with the capacity and the opportunity to maximise on the growth of tourism as one of the strong pillars of a changing South Australian economy."

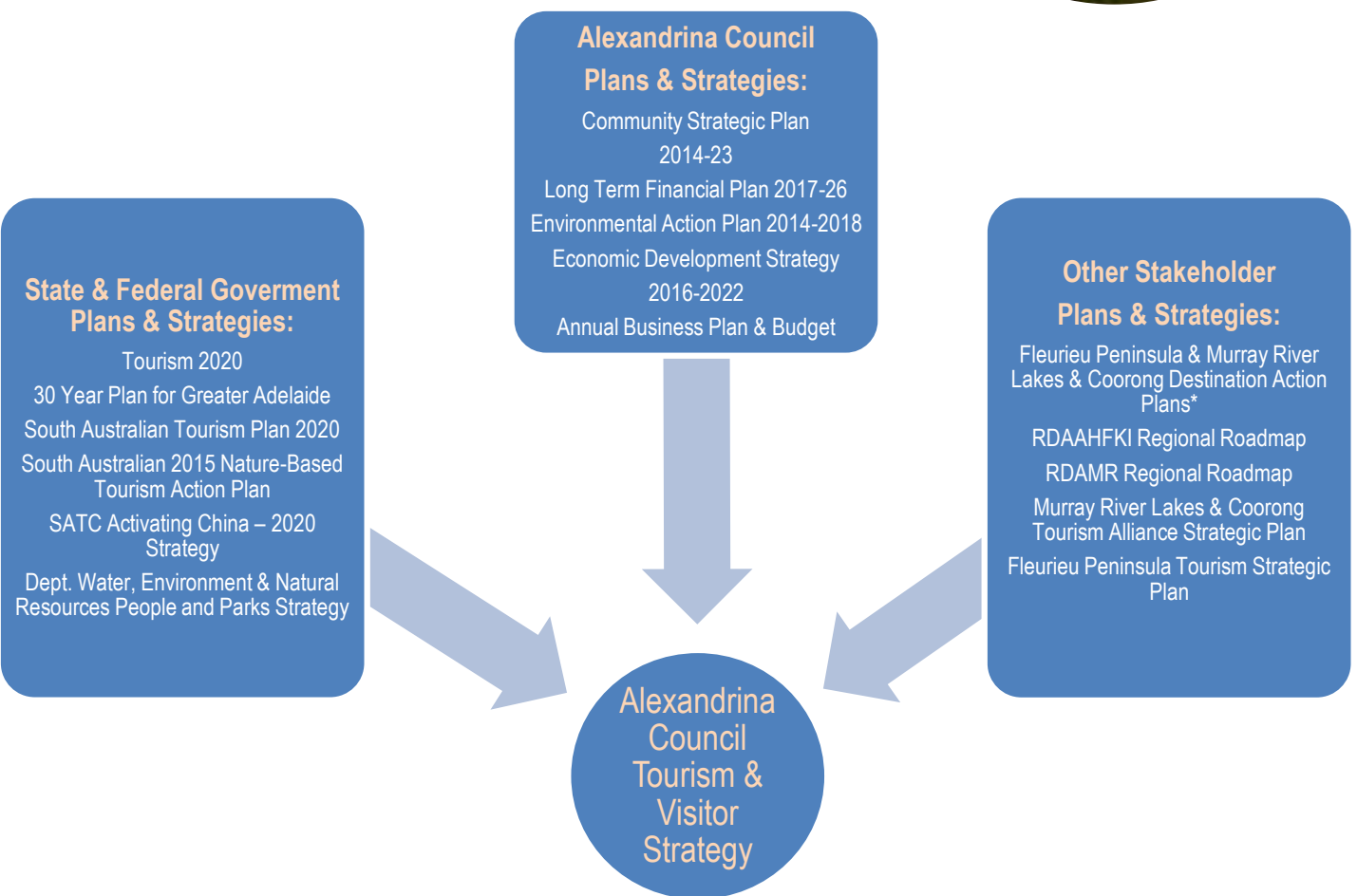# Background

Council's Role in Supporting Tourism

Council plays an integral, enabling role in tourism outcomes, including:

- providing funding to the two Regional Tourism Organisations: Fleurieu Peninsula Tourism (FPT) & Murray River Lakes & Coorong Tourism Alliance (MRLCTA)

- providing funding to Regional Development Australia Adelaide Hills, Fleurieu & Kangaroo Island (RDAAHFKI)

- providing key tourism infrastructure and signage

- funding and delivery of visitor information services - multiple Visitor Information Centres (VICs) and Visitor Information Outlets (VIOs)

- Council Tourism & Events team and the Economic Development Strategy

- management, maintenance and services of tourism assets, including Goolwa Wharf Precinct, P.S. Oscar W, galleries, walking trails

- shaping the locality as a tourist destination, facilitating special events and various attractions

- providing development and planning advice and approval of tourism development applications

- township placemaking and beautification.

Alignment with Stakeholder Strategies & Plans

The below diagram sets out the broader planning environment that influences and impacts on the Alexandrina tourism sector.

Alexandrina Council Plans & Strategies:

Community Strategic Plan 2014-23
Long Term Financial Plan 2017-26
Environmental Action Plan 2014-2018
Economic Development Strategy 2016-2022
Annual Business Plan & Budget

State & Federal Goverment Plans & Strategies:

Tourism 2020
30 Year Plan for Greater Adelaide
South Australian Tourism Plan 2020
South Australian 2015 Nature-Based Tourism Action Plan
SATC Activating China – 2020 Strategy
Dept. Water, Environment & Natural Resources People and Parks Strategy

Other Stakeholder Plans & Strategies:

Fleurieu Peninsula & Murray River Lakes & Coorong Destination Action Plans*
RDAAHFKI Regional Roadmap
RDAMR Regional Roadmap
Murray River Lakes & Coorong Tourism Alliance Strategic Plan
Fleurieu Peninsula Tourism Strategic Plan

Alexandrina Council Tourism & Visitor Strategy

* The Destination Action Plan (DAP) for each regional tourism area is an agreed plan between SATC and the relevant regional tourism organisation ('the partners') and its key stakeholders. The DAP frames how the partners and stakeholders can provide support to the region's tourism industry.

Economic Development Vision Statement

Growth in Alexandrina's economy will deliver an improved standard of living to its communities and will be driven by continuing enhancements in productivity and innovation.

The opportunities provided by the unique characteristics of Alexandrina's towns, the environment, our history, our quality produce, and the skills and experience of our labour force will attract businesses and investment to Alexandrina. Alexandrina will retain its distinctive identity, will be well-connected to the surrounding region and will be the location of choice for new businesses and investment.

Alexandrina Council Economic Development Strategy 2016-2022

Development of a Tourism Strategy was recommended as key action in the Economic Development Strategy. Tourism was identified in that Strategy as an area for which Council should focus its economic development efforts over the period 2016 to 2022 with the following objective set:

'Create Memorable Experiences: To expand and improve the local tourism offer and create memorable experiences for visitors'.

Action Plan: Tourism - Create Memorable Experiences

No:	Action	Council's Partnership	Timeframe
25	Prepare a specific tourism investment prospectus, identifying key tourism trends and potential development sites for quality visitor accommodation, events and attractions	N/A	1-2 years
26	Consider the preparation of an Economic Impact Assessment of the 2017 South Australian Wooden Boat Festival that can assist in gaining private and public funding for the festival	External resources	1-2 years
27	**Prepare an Alexandrina Tourism Strategy that identifies gaps in the tourism product offering and highlights specific opportunities for tourism operators. Key tourism segments that Alexandrina should target based on the region's strengths should also be identified in the Strategy (e.g. nature-based tourism, day visitors, food and wine tourism, etc). The Tourism Strategy will assist in identifying Alexandrina's tourism role in the context of the Fleurieu Peninsula and Murray River, Lakes and Coorong Destination Action Plans**	**Fleurieu Peninsula Tourism, Murray River, Lakes and Coorong Tourism, External resources (potential)**	**Completed**
28	Encourage proposals, where appropriate, that will assist in filling the gap in quality tourism accommodation facilities (e.g. Strathalbyn, Goolwa Wharf Precinct, Hindmarsh Island accommodation/conference facilities)	Land owners and developers	Ongoing
29	Continue to liaise frequently with Fleurieu Peninsula Tourism in developing the Fleurieu brand and product offering	Fleurieu Peninsula Tourism	Ongoing
30	Continue to liaise frequently with Murray River, Lakes and Coorong Tourism in developing the tourism brand and product offering	Murray River, Lakes and Coorong Tourism	Ongoing
31	Continue to support Visitor Information Centres located in Alexandrina	N/A	Ongoing
32	Continue to support existing tourism and other events that attract visitors to Alexandrina	Local business organisations and community groups	Ongoing

Other action areas and objectives highlighted that will complement development of the Alexandrina tourism sector include:
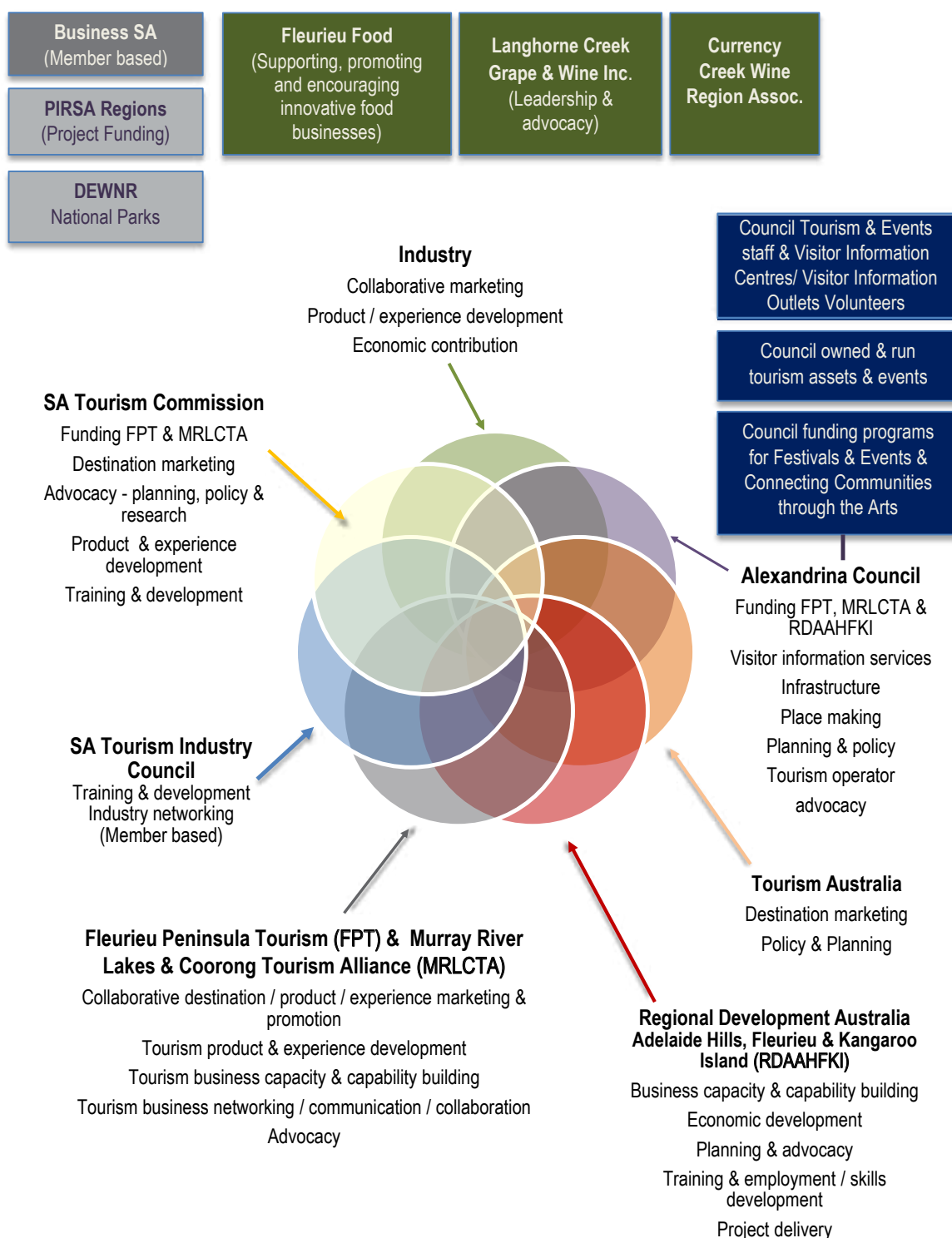
- **Investment and Business Attraction:** To be the location of choice for new businesses and investment in the region.

- **Infrastructure:** To ensure sufficient quality infrastructure is provided that supports business efficiency and contributes to the quality of life of residents.

- **Primary Production and Value-adding:** Alexandrina will be renowned and acknowledged for its high-quality primary produce.

- **The Local Wine Industry:** To improve the global awareness of the local wine industry to a level where it is comparable with the competing wine regions.

- **Lifestyle:** To protect and enhance the 'lifestyle' associated with living in Alexandrina.
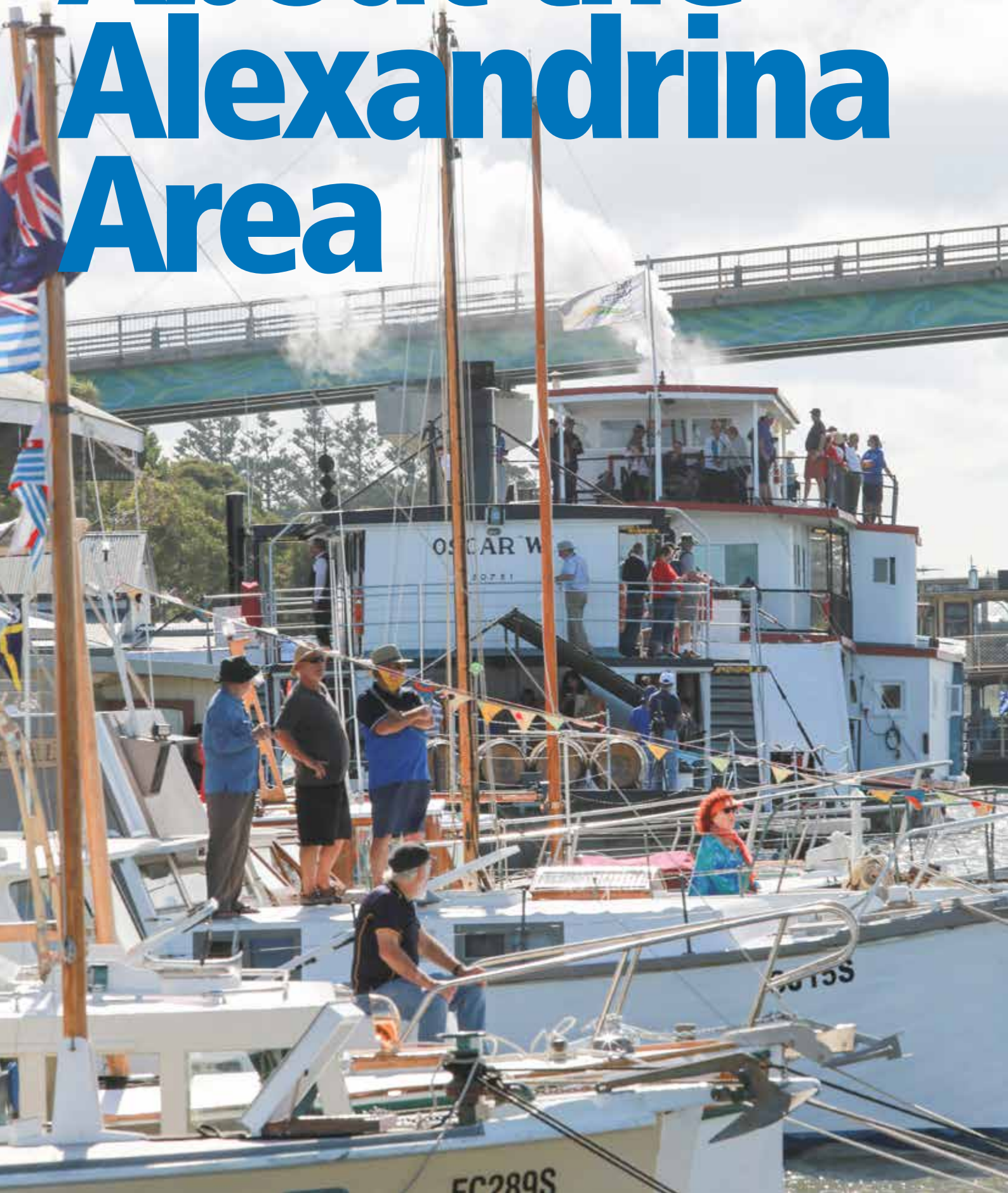
Current Stakeholder Relationships

Current resources applied to Tourism, Events and Arts outcomes in the Alexandrina Council area. The below diagram presents an overview of the current resources available and an indicative outline of key organisation roles.

Business SA
(Member based)

PIRSA Regions
(Project Funding)

DEWNR
National Parks

Fleurieu Food
(Supporting, promoting and encouraging innovative food businesses)

Langhorne Creek Grape & Wine Inc.
(Leadership & advocacy)

Currency Creek Wine Region Assoc.

Industry
Collaborative marketing
Product / experience development
Economic contribution

Council Tourism & Events staff & Visitor Information Centres/ Visitor Information Outlets Volunteers

Council owned & run tourism assets & events

Council funding programs for Festivals & Events & Connecting Communities through the Arts

SA Tourism Commission
Funding FPT & MRLCTA
Destination marketing
Advocacy - planning, policy & research
Product & experience development
Training & development

Alexandrina Council
Funding FPT, MRLCTA & RDAAHFKI
Visitor information services
Infrastructure
Place making
Planning & policy
Tourism operator advocacy

SA Tourism Industry Council
Training & development
Industry networking
(Member based)

Tourism Australia
Destination marketing
Policy & Planning

Fleurieu Peninsula Tourism (FPT) & Murray River Lakes & Coorong Tourism Alliance (MRLCTA)
Collaborative destination / product / experience marketing & promotion
Tourism product & experience development
Tourism business capacity & capability building
Tourism business networking / communication / collaboration
Advocacy

Regional Development Australia Adelaide Hills, Fleurieu & Kangaroo Island (RDAAHFKI)
Business capacity & capability building
Economic development
Planning & advocacy
Training & employment / skills development
Project delivery

About the Alexandrina Area

About the Alexandrina Area

Alexandrina is positioned in the picturesque southern Fleurieu Peninsula at the end of the River Murray and at the gateway to the iconic Coorong National Park. It is within an easy drive from metropolitan Adelaide, with the northern parts of the Council area less than an hour's drive from central Adelaide.

The Alexandrina Council area extends from the north-western side of Lake Alexandrina to the Murray Mouth and the western end of the Coorong National Park, taking in Langhorne Creek and the river communities Milang, Clayton Bay, Goolwa and Hindmarsh Island. The Council area also extends along the south coast through Middleton to Port Elliot and inland to Mount Compass and Strathalbyn. Many townships, villages and rural areas make up Alexandrina's communities, with Strathalbyn and Goolwa being the two major town centres serving the region. Alexandrina is one of the fastest growing municipalities in regional South Australia.

Alexandrina Council townships and localities are renowned for their charm and appeal which is supported by the Alexandrina Council Development Plan that identifies and protects the characteristics of the towns.

The Alexandrina Council tourism area 'fits' into two South Australian tourism regions, Fleurieu Peninsula and Murray River Lakes and Coorong.

State Context

The South Australian Visitor Economy has increased to $5.9 billion and is on track to reach $8 billion by 2020.

The Fleurieu Peninsula region performs as one of the strongest tourist regions and is the most visited region outside Adelaide with 715,000 visits and 2.2 million nights.

Fleurieu Peninsula Tourism Region

Visitor Data

Fleurieu Peninsula Tourism (FPT) has provided the below Tourism Research Australia data for 2014. Based on that data, the Alexandrina Council area records the second highest number of visitor nights, after Onkaparinga, for councils on the Fleurieu Peninsula.

Visitor Data

Council	Visitors	Visitor Nights	Average Nights	Spend
Alexandrina	854,000	765,000	3.0	$126 m
Victor Harbor	1,114,000	624,000	3.0	$149 m
Yankalilla	291,000	326,000	3.0	$43 m
Onkaparinga	1,090,500	807,000	4.9	$117.8 m

Further regional tourism data is provided as Appendix A.

Snapshot of Fleurieu Peninsula Tourism Industry (FPT)

Information provided by FPT Product Report as of 1 September 2015:

There are 678 registered tourism businesses across the Fleurieu Peninsula, registered with Australian Tourism Data Warehouse; 187 of those registered as being in Alexandrina Council area with a breakdown by sub-sector as follows:

Tourism Business Type	No of Businesses	% of Total
Accommodation providers	105	56%
Attraction listings (includes arts, galleries, cellar doors, activities)	45	24%
Events (changes monthly as events are updated)	4	2%
Hire business	1	1%
Visitor Information Centres	2	1%
Restaurants	18	10%
Tours	12	6%
Total	**187**	

Murray River Lakes & Coorong Tourism Region

Visitor Data

The Murray River, Lakes and Coorong region comprises the Local Government Associations of Alexandrina Council, Coorong District Council, Mid Murray Council and the Rural City of Murray Bridge, table below.

Council	Visitors	Visitor Nights	Average Nights	Spend
Alexandrina	854,000	765,000	3.0	$126 m
Coorong	163,000	160,000	3.0	$29 m
Mid Murray	440,000	469,000	3.0	$54 m
Rural City of Murray Bridge	471,000	280,000	3.0	$57 m

It is not possible to isolate the data in Alexandrina between that portion which contributes to the Murray River, Lakes and Coorong region and other areas of the district.

Value of Tourism to the Regional Economy

Current Statistics on Value of Tourism to the Regional Economy[1]

In 2013-14, the tourism industry contributed an estimated $360 million to the Fleurieu Peninsula regional economy (15.9% of gross regional product) and employed approximately 2,100 people (9.5% of regional employment).

In December 2015, the tourism industry grew to an estimated $428 million in the Fleurieu Peninsula regional economy while still employing approximately, 2,100 people[2].

In 2013-14, it is estimated that tourism directly represented 5% of the total Fleurieu Peninsula economy (in GRP terms), compared to 3.3% for regional South Australia.

Due to the region's reputation as a tourism hotspot, Fleurieu ranked second overall in the comparative importance of tourism across South Australia's regions, and fourth overall in industry size, supplying 2.5% of the state-wide contribution of tourism.

The Murray River, Lakes and Coorong region (also known as Murraylands) tourism industry contributed $112 million to the local economy while employing 700 people. While the region is smaller than the Fleurieu Peninsula region in most statistics, it does excel in the average length of stay for international visitors with 14.2 days compared to the Fleurieu's 8.4[3] days. Shacks and houses account for more than 40% of the region's tourism expenditure[4].

In 2013-14, the tourism industry contributed an estimated $360 million to the Fleurieu Peninsula regional economy

1 Regional Tourism Satellite Account Fleurieu Peninsula 2013-14

http://www.tourism.sa.gov.au/assets/documents/Fleurieu_Peninsula_factsheet_18Aug2015.pdf

2 The Value of Tourism on the Fleurieu Peninsula, 3 Year Annual Average to December 2015

http://tourism.sa.gov.au/assets/documents/Fleurieu_Peninsula.pdf

3 The Value of Tourism on the Murray River, Lakes & Coorong, 3 Year Annual Average to December 2015

http://tourism.sa.gov.au/assets/documents/Fleurieu_Peninsula.pdf

4 Murraylands: Tourism and Accommodation, 3 Years to 2015, supplied by RDA, Murraylands and Riverland

Return on Tourism Investment

It is possible to measure the return on tourism investment for two types of Alexandrina Council investments, sports marketing bringing sports events to the region and Visitor Information Centres.

Visitor Information Centres

In a study of South Australian Visitor Information Centres between 2011 and 2016, the SATC have calculated the return on investment to Fleurieu Peninsula from VIC visitation as worth $99.4 million over 5 years and 124 jobs. Goolwa supported over 155,000 visitors and Strathalbyn almost 120,000 visitors in 5 years – collectively making Alexandrina the second most visited area for VICs in the Fleurieu.

54% of bookings from VIC visitors was for product in the local tourist

area, demonstrating the value of investing in VICs to the region. See table below.

Sports Events Marketing

For the past three years, Alexandrina Council has invested $72,950 in a contract with Sports Marketing Australia to bring national and state level sporting events to the region. The spend for 2015-16 was $7.2 million to the region at a return on investment of $100 for every $1 invested.

Fleurieu Peninsula	5 Yr Total	5 Yr Average
Goolwa	155,350	31,070
McLaren Vale	504,908	100,982
Strathalbyn	119,865	23,973
Victor Harbor	263,350	52,670
Yankalilla	50,748	10,150
Total Visitors		218,844
Unplanned Economic Spend		$19,884,184
FTE Jobs created and Maintained over 5 yrs		124.3

Source: South Australian Accredited Visitor Information Network, Visitation and Economic Benefits 2011/12 to 2015/16.

Community Satisfaction

In the three annual Alexandrina Council Community Satisfaction Surveys, tourism and events and arts and culture rated consistently high, in the top seven of services and facilities.

Measure	Average Score out of 5 2014	Average Score out of 5 2015	Average Score out of 5 2016	Trend
Library Services	4.3	4.1	4.1	←→
General Courtesy of Council Staff	4.1	4.0	4.0	←→
Range of Community Groups & Sports Clubs	4.0	3.9	3.8	↓
Access to Parks & Reserves	4.0	3.9	3.9	←→
Ability to Become Involved in Community Life and Activities	3.9	3.8	3.7	↓
Arts & Culture Programs	3.8	3.8	3.9	↑
Tourism & Events	3.8	3.8	3.7	↓

In summary, this data shows that the Alexandrina Council region is performing well in the context of the Fleurieu Peninsula and the State and that there is opportunity to grow further. Alexandrina tourism, events, arts and culture are appreciated by the community.

How the Strategy was Developed

Consultation

Alexandrina Council undertook a business and community survey to gather local knowledge and views.

We sought participation from people already engaged in the tourism and visitor industry, from people who may be keen to become involved in the future, and from those who currently supply goods and services to visitors. A key focus of the survey was to get direct feedback from operators, hear their ideas and find out what support they need to achieve their goals.

There were 104 responses from business and community members, and 18 from staff and volunteers. The majority of respondents were small businesses (less than 20 employees) or not-for-profit community groups.

Respondents were asked a range of questions to gain insight into current strengths, weaknesses, opportunities and threats in relation to tourism and visitation for the region over the next five years. Respondents were also asked to highlight the top three initiatives they would like to see actioned and what they believe Council's role is in relation to those initiatives.

The results provide a snapshot of industry views and aspirations and suggestions as to how they can be addressed. They also reflect the diversity of views and provide insights that have assisted in the development of this Strategy. The information gathered also presents opportunities and challenges back to industry itself to action, e.g. via increased collaboration and training, and development of new tourism products and experiences.

Quantitative data gathered is provided as **Appendix C**.

Workshops with key stakeholders and Elected Members were conducted.

High Level SWOT Analysis

Feedback gathered via consultation has informed the following high level analysis of the strengths, weaknesses, opportunities and threats (SWOT) for tourism in the Alexandrina area.

Strengths	Weakness
• Natural assets and their uniqueness – Coorong, Murray Mouth – unique combination – river, beaches, sand hills, bird life, whales, canoe trees / significant trees – temperate climate / clean air - pristine and diverse environment / Variety of nature based experiences – scenic drives / views / fishing / boating. • Location – proximity to Adelaide / international airport / Kangaroo Island, Adelaide Hills, Victor Harbor / en route from Victoria. • Towns are appealing to visitors, well maintained and presented, preservation of township character and heritage - not over exposed / charming walks - has value to visitors / towns are key attractions - towns are in close proximity to each other - appealing to drive market - most activity based in towns. • Appeal as a place to relax / take a break / lifestyle / 'passive tourism'. • Arts & cultural facilities, programs and artists attract visitors. • Variety, diversity and number of attractions and experiences available / appealing to broad demographic. • Existing quantity, quality and variety of events / great location for events. • Local food and wine / Langhorne Creek wine region / quality primary produce suppliers and markets. • Value of the indigenous and settlement history, heritage and culture / activation of history & heritage – buildings, attractions and experiences / river and boats / uniqueness of having both steam train and paddle steamer. • Retail – antiques shops in Strathalbyn – Port Elliot – people spending money there – well developed (maintained and built character) vibrant, quirky, fun, cheeky but still has heritage character.	• Seasonality / impact of weather / difficult to attract visitors year round. • Perception of distance from Adelaide / perception as 'a retirement centre'. • Variety, quality and quantity of accommodation. • Tourism signage – needs attention – directional, entrance points e.g. need signage at Wellington ferry. • Lack of Council parking spaces in general and parking for caravans and recreational vehicles. • Lack of public transport – from Adelaide and between Fleurieu towns – restricts visitor spend. • Poor quality of roads, particularly leading to major visitor destinations. • Quality, quantity and variety of food options for visitors – opening hours. • Lack of awareness of what Langhorne Creek wine region has to offer. • The area is often bypassed / many visitors go straight to Victor Harbor or Kangaroo Island. • Operators and stakeholders need to work better together.

Opportunities

- Convert day trippers to overnight stays / increase average spend / more evening activities to keep people here e.g. fireworks (Symphony of Fire https://vancouversbestplaces.com/events-calendar/festivals-and-events/english-bay-summer-fireworks/) / year round activities / improve the visitor experience.
- Greater investment in accommodation, particularly in mid-range and to cater for larger groups.
- Develop more cycling and walking trails.
- Continue to develop attractions and experiences in order to remain competitive / capitalise on natural assets to create new sustainable visitor experiences.
- Develop Murray Mouth area – upgrade facilities / develop / expand Goolwa Wharf precinct – more evening and family friendly activities.
- Develop new major / hero events that attract intrastate visitors year round (e.g. events during 'low periods') / sporting / cultural / family focused events / attract meetings, incentives, conference and events (MICE) market.
- Develop produce and wine trails / improve the dining variety and quality in the region / increased availability (opening times e.g. evenings).
- Increased marketing of the area to enhance its attractiveness as a visitor destination & increase awareness of what we have to offer / leverage proximity to Adelaide.
- Improve operator & stakeholder collaboration, coordination, networking and working relationships, including across Council boundaries.
- Work with business and the community to promote understanding around the value of tourism.
- Work with relevant authorities to develop a collaborative approach to facilitating and assessing the necessary applications required for tourism activities.
- Focus on retail as value add – retail tourism strategies / unique and bespoke shopping precincts that draw the tourists to the region.
- Activated heritage / settlement heritage – buildings and stories of the local people.
- Indigenous tourism –with guidance from local indigenous community / respectful of history, culture and people.
- Build local business capacity and capability – engage businesses in focus on increasing visitor spend – collaboration / co-promotion / packaging / bundling of products and experiences – improve customer service / increase understanding of how businesses are connected to / impact on visitor economy.
- Businesses investing in maintenance and improvement – facades, training, product development, alfresco dining, lighting, connecting with other businesses etc. / allocate funding for working with businesses to complement Council place making.

Threats

- Viability of stakeholders and small businesses / high costs of doing business.
- Future development not in keeping with existing history, heritage and character, could lose value in current appeal to visitors.
- Competition from other regions.

Vision

'Create Memorable Experiences: To expand and improve the local tourism offer and create memorable experiences for visitors'.

As identified in the Alexandrina Council Community Strategic Plan 2014-23 and Alexandrina Council Economic Development Strategy 2016-22.

Goals

1. Create welcoming, accessible public spaces around natural and built environments.

2. Identify and encourage environment, lifestyle, heritage and visitor experiences.

3. Inspire arts, culture and creative activities that encourage investment and participation.

4. Encourage an innovative local and regional tourism industry.

Goals

Visitors value the essence, charm and character of Alexandrina, that it's accessible and supports both active and passive tourism.

The intent of the Strategy is to protect, celebrate and promote what we have – unique natural assets and localities with broad appeal. The Fleurieu is the number one visited region in SA (outside of Adelaide). The Strategy is about positioning our local industry in this strong context and supporting them, giving people things to do that create memorable experiences – retail, dining, events, arts, culture, education, adventure – and keep them coming back.

The Fleurieu Peninsula Tourism 2020 Strategy has identified experience themes, hero products and 'ideal customers' that also suit Alexandrina. This can guide Council in articulating the type of memorable experiences we want to create.

Refer **Appendix B**.

The top three goals were as identified in the Alexandrina Council Community Strategic Plan 2014-23 under the Aspiration, Activate our Spaces.

Create Memorable Experiences

Core
Target
Markets

Core Target Markets

In determining the core target markets for increasing visitation to the Alexandrina Council area in the next five years, consideration has been given to what our current strengths are and what markets are most likely to be attracted to those strengths.

Consultation with tourism operators via the online survey provided the following feedback with regards to our current visitors:

- Families represent the highest category of visitors, followed by independent travellers, cultural tourists (arts, heritage, history and events) and people visiting friends and relatives.

- In terms of origin of visitors, the majority are from intrastate (other places within South Australia), followed by locals (people from the Alexandrina Council area) and interstate, with international visitors having the lowest percentage.

The two core target markets for initial focus are metropolitan Adelaide residents and the broader South Australian intrastate market, and key interstate markets.

Opportunities also exist to maximise on existing sources of international visitors to Adelaide such as people visiting corporate businesses and families of international students.

South Australian Intrastate Market

The intrastate visitor market (Adelaide metropolitan areas and regional South Australia) represents 62% of total visits in South Australia and 37% of visitor nights. This key market presents a significant opportunity for Alexandrina to increase visitation and visitor spend by increasing visitation and converting daytrippers to overnight stays.

Our Role

Our Role

Alexandrina Council is a collaborative contributor to two Regional Tourism Organisations (RTOs) that drive tourism development and growth for the Council area, Fleurieu Peninsula Tourism and the Murray River Lakes & Coorong Tourism Alliance. Council also provides funding to Regional Development Australia Adelaide Hills, Fleurieu & Kangaroo Island (RDAAHFKI) towards delivery of economic development and direct business assistance services. This Strategy will provide these organisations with clear targets, goals and objectives to inform their planning and guide the delivery of services and initiatives for our Council area.

The role of Local Government has been described in the Fleurieu Peninsula Tourism 2020 Strategy as follows:

• encouraging new business development

• investing in Fleurieu Peninsula Tourism

• approving and funding events

• providing visitor services (VICs, VIOs)

• maintaining attractions and infrastructure.

Council is integral to promoting the understanding of the value of tourism and the visitor economy, applying a visitor lens to decision making, and balancing needs and wants of residents with the needs and wants of visitors.

Both SATC and FPT representatives applauded Council for fulfilling its vision and role in tourism and encouraged it to continue.

As part of the Strategy, Council will fulfil a broad range of roles and functions which are outlined below. As we implement the Strategy, we will be clear about our role and work collaboratively with the community, Government and industry to achieve the strategic vision.

Council's roles and functions in relation to implementing this Strategy include:

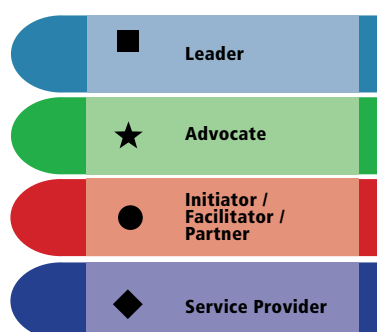|	Role	Description
■	**Leader**	Provide leadership and guidance to the community in line with the Strategy. Create an environment where visitors are important and valued by the community e.g. by applying a 'visitor lens' to the way we do things.
★	**Advocate**	Seek collaboration with other tiers of government and the private sector to deliver initiatives under the Strategy.
●	**Initiator / Facilitator / Partner**	Connect people, businesses and groups to pursue opportunities and create catalyst opportunities.
◆	**Service Provider**	**Direct**, responsible for funding and providing a service (to visitors, to businesses, to the community and groups). **Partner**, contribute funds and/or other resources towards a service or initiative that is delivered in partnership with other organisations. **Agent**, provide a service funded by or on behalf of others which involves hosting or other use of Council resources to fill particular needs.

Objectives and Strategies

Please note the following with regards to the timeframes and Council's role outlined below:

Council's role:

■	**Leader**
★	**Advocate**
●	**Initiator / Facilitator / Partner**
◆	**Service Provider**

Timeframes:

- **Short term** – in the first twelve months
- **Medium term** – in two to three years
- **Long term** – four years or greater

GOAL 1: Create welcoming, accessible public spaces around natural and built environments
Objective 1.1: Increase variety, quality and quantity of accommodation

	Strategies:	Short (S) / Medium (M) / Long Term (L)	Council's Role
1.1.1	Encourage proposals, where appropriate, that will assist in filling the gap in tourism accommodation (minimum 30 room). NB: Economic Development Strategy Action	L	●
1.1.2	Review current accessibility / options for free camping (including accessibility for recreational vehicles) and increase availability if appropriate	M	◆

Objective 1.2: Maintain and enhance township character, charm and attractiveness to visitors

1.2.1	Continue to maintain and beautify townships	S,M,L	■ ◆
1.2.2	Develop placemaking initiatives that enhance the attractiveness and appeal to visitors (including working with the Strathalbyn Community Advisory Panel on the Strathalbyn Town Plan) NB: Economic Development Strategy Action	L	●

Objective 1.3: Continue to provide facilities that meet the needs of visitors

1.3.1	Continue to invest in maintenance, renewal and development of visitor facilities and amenities to meet visitor (reasonable) needs	S,M,L	◆
1.3.2	Work with key stakeholders to determine demand for and appropriate location of recreational vehicle dump points	M	◆

Objective 1.4: Improve tourism signage in the region to increase destination visitation of the region (wayfinding)	Short (S) / Medium (M) / Long Term (L)	Council's Role
Strategies:		
1.4.1 Continue to work with key stakeholders to improve signage for the Alexandrina region that reduces bypassing of the region, increases visitation to the region and increases visitation within the region (e.g. freeway exit at Callington)	L	●
1.4.2 Investigate current maps particularly digital access (content, ease of use and accuracy) and navigational information (e.g. touring routes) and increase usability for visitors	S	◆

Objective 1.5: Continue to provide tourism infrastructure that meets the needs of visitors		
1.5.1 Review opportunities to continue to develop and maintain walking /cycling trails consistent with future strategies for cycling and the Footpath Master Plan	M	◆
1.5.2 Work with key stakeholders to review and address quality of roads leading to major tourism destinations	S, M, L	◆

Objective 1.6: Advocate for increased public transport options in the region		
1.6.1 Work with key agencies in State Government to seek increased public transport services to support population growth. NB: Economic Development Strategy Action	L	★

Objective 1.7: Ensure that adequate parking spaces are provided that meet visitor and business needs (on land and water)		
1.7.1 Review current parking availability and accessibility including options that facilitate sustainable access to natural assets and spaces for caravans and recreational vehicles (particularly in proximity to VICs such as the upcoming review of Cutting Road, Goolwa Wharf Precinct)	L	◆

GOAL 2: Identify and encourage lifestyle, heritage and visitor experiences Objective 2.1: Develop the Murray Mouth as a (sustainable) hero attraction in partnership with State Government		
2.1.1 Work with key stakeholders to review current accessibility for visitors to the Murray Mouth and provide sustainable access to the area	M	●
2.1.2 Develop and implement signage, amenities and facilities that support sustainable access to and activation of the Murray Mouth and develop and support visitor experiences	M	●

Objective 2.2: Further develop the Goolwa Wharf Precinct as a hero attraction to maximise visitor attraction and spend		
2.2.1 Further Goolwa Wharf development as per Goolwa Wharf Precinct Board Strategic Plan	S, M, L	◆
2.2.2 Continue to promote and operate the PS Oscar W and associated Riverboat Centre	S, M, L	◆
2.2.3 Continue to promote and operate the SA Wooden Boat Festival	S, M, L	◆

Objective 2.3: Continue to develop and contribute to Council coordinated, grant funded and/or sponsored events that attract visitors

	Strategies:	Short (S) / Medium (M) / Long Term (L)	Council's Role
2.3.1	Develop a tiered event model to define levels of Council financial and in-kind support for events in Alexandrina	S	◆
2.3.2	Promote and communicate calendar of events with key stakeholders and industry members	S	◆
2.3.3	Work with SATC / Events SA / RDA and regional tourism bodies to determine assistance available to operators to grow and improve existing and develop new events and packaging of product (e.g. events, dining and accommodation)	S	●
2.3.4	Continue to develop opportunities in the region with Events SA and the State Government	M	●
2.3.5	Provide advice and networking to those in the community proposing new events (see 2.3.1)	M	★

Objective 2.4: Preserve, protect and promote history and heritage of the area

2.4.1	Protect and preserve charm, character and heritage of Alexandrina townships to maintain visitor appeal including through Development Plan, Heritage Advisory Committee and Local Heritage Grants	S,M,L	◆
2.4.2	Explore opportunities to showcase Aboriginal culture in Alexandrina area with exploration of topic at Leader to Leader meetings and through key projects like Bashams Beach and Sir Richard Peninsula	M	●
2.4.3	Become immersed in History Month (the State Gov initiative) to promote heritage and history of the region including collaboration with Local History Groups and Council formed Committees/Panels	S	●

Objective 2.5: Ensure that Council policies and programs support tourism and visitor economic growth

2.5.1	Encourage residential and commercial development is in keeping with existing township charm, character and heritage	L	■
2.5.2	Develop township plans that address and support tourism and visitor experiences – such as the Strathalbyn Town Plan	S,M,L	◆

Objective 2.6: Continue to provide Visitor Information Centres in Goolwa and Strathalbyn and consider tourism presence in other townships

2.6.1	Continue to support Visitor Information Centres located in Alexandrina (7 days a week) NB: Economic Development Strategy Action	S,M,L	◆
2.6.2	Investigate innovative visitor-related information opportunities (e.g. mobile or technology solutions)	M	◆
2.6.3	Continue to liaise with partner organisations in other townships to foster provision of tourism information	M	◆
2.6.4	Continue the Riverboat Centre as a focal point for visitor experiences	S,M,L	◆

GOAL 3: Inspire arts, culture and creative activities that encourage investment and participation
Objective 3.1: Promote Alexandrina as an arts and cultural hub in the Fleurieu region

	Strategies:	Short (S) / Medium (M) / Long Term (L)	Council's Role
3.1.1	Continue to identify, connect and promote arts and cultural tourism experiences and attractions in the Alexandrina region	S,M,L	◆ ■
3.1.2	Continue to invest in public art and arts and cultural programs that encourage cultural tourism development throughout the Alexandrina region	S,M,L	◆

GOAL 4: Encourage an innovative local and regional tourism industry
Objective 4.1: Building existing business capacity and capability

4.1.1	Determine what assistance can be provided by RDA, SATC, FPT, MRLCTA and SATIC, for example: • Development of business-to-business networking, collaboration and assistance • Development and provision of training and development in line with areas identified in industry survey and identified skills gaps • Main Street activation – identification and facilitation of development opportunities by businesses • Networking and collaboration including cluster development and opportunities for packaging of products and experiences	S	●
4.1.2	Work with key stakeholders to promote take up of available assistance including free workshops (promoting via stakeholder databases and existing communications mechanism and secure them being offered in the region)	S	●
4.1.3	Work with key stakeholders to encourage businesses to invest in maintenance and improvement of business – facades, training, product development, alfresco dining, lighting, facilitation of business interaction etc.	M	■
4.1.4	Work with local business associations to boost their capacity to support local businesses	L	●

Objective 4.2: Maintain existing relationships with tourism development bodies, other Councils and organisations and support and review as required

4.2.1	Continue to fund Regional Tourism Organisations (FPT & MRLCTA)	S,M,L	●
4.2.2	Work with RDA to undertake business capability programs/support/activities	S	★

Objective 4.3: Increase share of key tourism markets

	Strategies:	Short (S) / Medium (M) / Long Term (L)	Council's Role
4.3.1	Provide support as required to FPT in implementation of initiatives to support growth in Meetings, Incentives, and Conferences & Events' (MICE) market	M	●
4.3.2	Continue to invest $35k annually in Sports Marketing Australia to attract sports events to the region (for next five years then review)	S	◆
4.3.3	Prepare a Tourism Investment Prospectus NB: Economic Development Strategy Action	S	●

Objective 4.4: Support development of brand awareness for Alexandrina wine regions and local primary produce

4.4.1	Support initiatives by relevant stakeholder groups to enhance brand awareness in consumer markets	M	★
4.4.2	Work with stakeholders to strengthen our local food and wine trails	M	★

Objective 4.5: Encourage development of quality dining experiences

4.5.1	Work with stakeholders to encourage greater opening hours	S	■
4.5.2	Encourage RDA to seek external investment in development of new dining options (precinct development)	L	★
4.5.4	Work with stakeholders to develop and provide hospitality training within the region	L	★

Objective 4.6: Work collaboratively to celebrate and promote what the region has to offer – unique natural assets and township charm and character

4.6.1	In line with regional tourism bodies key themes and hero experiences (refer Appendix B), identify hero experiences in the Alexandrina area for future promotion	S	●
4.6.2	Work with key stakeholders to develop a new Marketing Strategy for the Visitor Information Centre team to market Alexandrina as a visitor destination (including the provision of more themed guides such as the OPAL Playground brochure)	S	●
4.6.3	Review the structure and use of Council tourism websites ensuring linkages to the websites of regional tourism bodies	S	◆

Objective 4.7: Create opportunities for tourism industry operators to network, collaborate and share ideas

4.7.1	Develop a database of local businesses (including tourism businesses) NB: Economic Development Strategy Action	S	◆
4.7.2	Develop an annual calendar of networking events (may include training and development)	S	●

Measuring Progress and Success

Measuring Progress and Success

Specific targets and measures will be considered by the Alexandrina Council as part of development of an Implementation Action Plan. In addition to achievement of objectives under this Strategy, suggested measures may include:

- proportion of tourism industry as a contribution to Gross Regional Product

- the number of businesses registered on the Australian Tourism Data Warehouse

- number of attendees at events

- improvements noted in visitor data.

Implementation

Council will implement the Tourism and Visitor Strategy through the Annual Business Plan and Budget allocations for tourism and related projects. Annual actions will be defined in the Annual Business Plan.

Council will seek advice from the Economic Development Advisory Panel as needed.

Appendix A:

Regional Tourism Data

1. Tourism Research Australia

Local Government Area Profiles: Alexandrina Council, District Council (DC), South Australia
http://tra.gov.au/research/local-goverment-area-profiles.html

Key tourism metrics for Alexandrina DC

	Visitors	Visitor Nights	Average Stay (nights)	Spend ($)	Average spend per trip ($)
International	4,000	31,000	8.0	$2,000,000	$423
Domestic Overnight	226,000	734,000	3.0	$80,000,000	$356
Domestic Day	624,000	-	-	$44,000,000	$66
Total	854,000	765,000	3.0	$126,000,000	$148

Visitors to Alexandrina Council area (Four year averages to 2014)

Reason	International	Domestic Overnight	Domestic Day	Total
Holiday	3,000	155,000	366,000	524,000
Visiting friends or relatives	2,000	57,000	191,000	250,000
Total	5,000	212,000	557,000	774,000

2. SATC Tourism Research

Fleurieu Peninsula Regional Tourism Profile December 2013 – December 2015
http://tourism.sa.gov.au/assets/documents/Regional_Summary_Fleurieu_Peninsula_Dec_13_-_Dec_15.pdf

	Visits	%	Nights	%	Average length of stay	Day Trips
International	21,000	3%	176,000	8%	8.4	-
Intrastate	565,000	83%	1,516,000	76%	2.7	-
Interstate	114,000	17%	484,000	24%	4.2	-
Total domestic	679,000	97%	1,999,000	92%	2.9	-
Total visits	699,000		2,175,000		3.1	2,384,000

Reasons for visiting	Visits	%	Nights	%	Average length of stay
Holiday	465,000	66%	1,389,000	64%	3.0
Visiting Friends & Relatives	192,000	28%	667,000	31%	3.5
Business	26,000	4%	53,000	2%	2.0
Other	16,000	2%	66,000	3%	4.1
Total visits	699,000		2,175,000		3.1

Murray River, Lakes and Coorong Tourism Profile December 2013 – December 2015
http://tourism.sa.gov.au/assets/documents/Regional_Summary_Murray_Lands_Dec_13_-_Dec_15.pdf

	Visits	%	Nights	%	Average length of stay	Day Trips
International	6,000	3%	85,000	13%	14.2	-
Intrastate	194,000	82%	444,000	75%	2.3	-
Interstate	41,000	18%	145,000	25%	3.5	-
Total domestic	236,000	97%	589,000	87%	2.5	-
Total visits	242,000		674,000		2.8	591,000

Reasons for visiting	Visits	%	Nights	%	Average length of stay
Holiday	150,000	62%	463,000	69%	3.1
Visiting Friends & Relatives	60,000	25%	151,000	22%	2.5
Business	22,000	6%	41,000	6%	1.9
Other	10,000	3%	20,000	3%	2.0
Total visits	242,000		674,000		2.8

a) The Value of Tourism in the Fleurieu Peninsula 3 Year Annual Average to Dec 2015
http://tourism.sa.gov.au/assets/documents/Fleurieu_Peninsula.pdf

Visitor Expenditure $428m Overnight Visitors / Year 699k	Proportion of Interstate Overnight Visitors 16% Proportion of Intrastate Overnight Visitors 81% Proportion of International Overnight Visitors 3%	Visitor Nights 2.2m Direct Employment 2100 Tourism Businesses Yr end June 2015 820 Hotel Rooms Yr end June 2015 508

The Value of Tourism in the Murraylands 3 Year Annual Average to Dec 2015
http://tourism.sa.gov.au/assets/documents/Murraylands.pdf

Visitor Expenditure $112m Overnight Visitors / Year 242k	Proportion of Interstate Overnight Visitors 17% Proportion of Intrastate Overnight Visitors 80% Proportion of International Overnight Visitors 3%	Visitor Nights 674k Direct Employment 700 Tourism Businesses Yr end June 2015 290 Hotel Rooms Yr end June 2015 158

b) Other available data:

- Visits to South Australian Regions Year Ending September 2015
  http://www.tourism.sa.gov.au/assets/documents/Visits_to_SA_Regions_Sept_15.pdf

- National Visitor Survey (NVS) Results Year Ending September 2015
  http://www.tourism.sa.gov.au/assets/documents/NVS_September_2015.pdf

- International Visitor Survey December 2015
  http://www.tourism.sa.gov.au/assets/documents/IVS_Summary_Dec_15.pdf

- Accommodation Annual Results (Hotels, motels, guest homes and serviced apartments (with 15 or more rooms)
  http://www.tourism.sa.gov.au/assets/documents/Survey_of_Tourist_Accommodation_Year_end_June_15.pdf

3. Regional Tourism Satellite Account (TSA) Fleurieu Peninsula 2013-14

http://www.tourism.sa.gov.au/assets/documents/Fleurieu_Peninsula_factsheet_18Aug2015.pdf

In 2013-14, the tourism industry contributed an estimated $360 million to the Fleurieu Peninsula regional economy (15.9% of gross regional product) and employed approximately 2,100 people (9.5% of regional employment).

In 2013-14, it is estimated that tourism directly represented 5% of the total Fleurieu Peninsula economy (in GRP terms), compared to 3.3% for regional South Australia.

Due to the region's reputation as a tourism hotspot, Fleurieu ranked 2nd overall in the comparative importance of tourism across South Australia's regions, and fourth overall in industry size, supplying 2.5% of the state-wide contribution of tourism.

Key Aggregates:

In 2013-14, the tourism activity in the Fleurieu Peninsula generated:

- Tourism output: $219 million and $518 million in direct and indirect tourism output, and $737 million in total tourism output.
- Gross Value Added (GVA): $108 million and $212 million in direct and indirect tourism GVA, and $320 million in total tourism GVA.
- Gross Regional Product (GRP): $113 million and $247 million in direct and indirect tourism GRP and $360 million in total tourism GRP.
- Employment: 2,100 jobs for people employed directly by the tourism industry, 2,100 indirect jobs and a total employment impact of 4,200 people.

Tourism Related Industry Profile

At the industry level, the tourism products that contributed the most to tourism consumption in Fleurieu Peninsula in 2013-14 were: (1) $101m on takeaway and restaurant meals, (2) $96m on fuel, and (3) $87m on shopping.

In terms of overall economic contribution, the tourism industries that generated the highest economic benefit to Fleurieu Peninsula in 2013-14 were:

- accommodation with $24m in direct GVA and $25m in direct GRP
- cafes, restaurants and takeaway food services with $19m in direct GVA and $20m in direct GRP
- other retail trade with $22m in direct GVA and $20m in direct GRP.

Tourism Employment

The TSAs define tourism employment as the number of tourism employed persons. In 2013-14 there were 2,110 persons (made up of 890 full-time and 1,220 part-time) directly employed in tourism in Fleurieu Peninsula.

The tourism related industries that contributed most to regional tourism employment in Fleurieu Peninsula in 2013-14 were:

- cafes, restaurants and takeaway food services (210 full time and 500 part time employed persons)
- retail trade (220 full time and 300 part time employed persons)
- accommodation (110 full time and 160 part time employed persons).

Appendix B:

Fleurieu Peninsula Tourism Experiences

Experiences and Hero Products

Hero experiences are those moments that change the way our visitors think and feel, and help to differentiate a destination. During the consultation workshop, refer page 54, participants identified the experience themes and hero experiences the Fleurieu Peninsula has to offer as a tourism destination.

Experience Theme	Hero Products	
Aquatic / Coastal Fleurieu Peninsula is a beach lover's playground, offering opportunities for an intimate interlude with the ocean at every turn.	Whale watching Beaches - walking / swimming Cruising Kayaking	Fishing charters Fishing on land Driving on beaches Beach yoga
Landscapes / Nature / Wildlife With its winding coastline, rugged hillsides, the Fleurieu is one of the most picturesque regions in South Australia, and is a delight to the senses, on all levels. Living in the landscapes are a sensational array of flora, and abundance of accessible fauna for all ages.	Coastal scenery Bushwalking Hiking Deep Creek Heysen Trail Onkaparinga Gorge Waterfalls	Glacier Rock Penguin tours Granite Island Animal farms Walking trails Wetlands Bird watching
Food & Wine Wine lovers have four distinct wine regions to explore, including McLaren Vale, nearby Langhorne Creek, Currency Creek and Southern Fleurieu - all offer superb wine and intimate cellar door experiences. The region also boasts a progressive food culture, with an array of 'foodie' opportunities for all palates.	100+ cellar doors 100+ restaurants / cafes Markets Fruit picking Wine blending Iconic food producers	Distilleries Breweries Picnic spots Bakeries Cooking school Coffee roaster Farm gates
Art / Heritage / Culture The Fleurieu Peninsula has been an inspiration to creative people for many, many generations, and is constantly celebrated in each pocket of the region in various forms.	Galleries Artist studios Public art Live music Port Noarlunga boat wreck Giant Buddha Sculpture Trail	Performance Craft markets Artisan markets Towns and attractions Canoe trees Ochre cliffs Signal Point
Adventure Whether it is in the water, air or on land, there is an adventure waiting for all levels of excitement and ability.	Surfing Sailing Scuba diving / SNUBA Skiing Jet skiing Paddle boarding Horse riding Camel riding Cycling Adventure playgrounds	Big Duck Quad bike Bi-planes / gliding / parasailing Ballooning 4WDing Skydiving Tours Golf Rock climbing

Appendix C:

Quantitative Survey Data

Who responded?

Survey participants by type

Legend:
- Retail
- Gallery / Musuem / Retail
- Wine tasting /sales
- Restaurant / Café / Hotel / Bistro
- Food - retail (fresh & value add)
- Accommodation - B&B
- Accommodation - self-contained
- Accommodation - Holiday house
- Accommodation - Tourist Park
- Accommodaiton - motel / resort / budget
- Transport / Tours / Nature based tours
- Personal services (spa)
- Professional services
- Surf school
- Sporting club facilities & services
- NFP - Community / industry group

Pie chart values: 10.5%, 8.1%, 11.6%, 3.5%, 3.5%, 3.5%, 4.7%, 4.7%, 5.8%, 5.8%, 2.3%, 2.3%, 5.8%, 2.3%, 14.0%, 11.6%, 5.8%

Accommodation - total respondents 28%

Survey participants by location

Goolwa, Strathalbyn, Port Elliot, Mt Compass, Other, Milang, Hindmarsh Island, Victor Harbor, Langhome Creek, Middleton, Adelaide Hills

(Axis: 0.0%, 5.0%, 10.0%, 15.0%, 20.0%, 25.0%, 30.0%, 35.0%)

Number of employees (full time equivalent)

Legend:
- 1-5
- 6-10
- 11-20
- 21-50
- 51+

Pie chart values: 67.4%, 13.5%, 12.4%, 6.7%, 0.0%

Majority of respondents who employ staff and provided data are small businesses with five or less employees.

Tourism & visitor products, experiences and services

Respondents were asked to indicate the type of products, experiences or services they provide (or are interested in providing) for visitors and tourists in the Alexandrina Council area

Chart: Tourism & visitor products, experiences and services — No. of respondents

Legend: ■ Currently provide ■ Interested in providing

Category	Currently provide	Interested in providing
Visitor information	26	10
Transport	5	4
Training	5	
Tours	11	8
Takeaway food	8	
Supermarket	2	2
Sport & recreation	9	2
Short Term Holiday Accommodation - ...	16	2
Short Term Holiday Accommodation - ...	6	
Restaurant	8	2
Produce supplier	9	4
Nature based / environmental / ...	14	5
Motel	3	
Kiosk / deli	5	2
Jewellery / Gifts / homewares	7	
Hotel	6	
History / heritage	20	5
Hire Facilities / equipment	14	
Function / conference centre	7	4
Food and wine	18	8
Events	10	6
Education	10	3
Clothing	6	2
Caravan / Cabin / Tourist Park	6	
Café / bistro	12	4
Bed and Breakfast	15	5
Bakery	5	
Arts & culture	11	4
Art Gallery	10	2
Adventure	13	4

Who are our current visitors and tourists?

Percentage of visitors by origin

Chart categories (vertical axis): Locals (people from the Alexandrina Council area); Intrastate (from other places within South Australia); Interstate (from other states and territories of Australia outside of South Australia); International

Horizontal axis: 5, 10, 15, 20, 25, 30, 35, 40, 45, 50

Percentage of visitors by category

Chart categories: People visiting friends and relatives; Business travelers; Families; Independent travelers; Nature based / ecotourism / adventure tourists; Cultural tourists (arts, heritage, history, events); Groups (schools / tour companies / social Groups & local associations)

Horizontal axis: 5, 10, 15, 20, 25, 30, 35

How do visitors find your business / book / purchase your product / experience?

Chart categories: Registration on the Australian Tourism Data Warehouse; Registration on tourism / industry websites; Internet search by product / area; Business has a dedicated website; Social media channels and peer endorsements / word of mouth; Media advertising (print, radio, television); Regional visitor guide; Visitor information centres

Horizontal axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 50.0%, 60.0%, 70.0%, 80.0%, 90.0%, 100.0%

What assistance are businesses looking for in order to help them grow?

If you are looking to grow / expand your business in the next five years, what assistance would help you to do that?

Categories (bottom to top):
- Business to business networking & information sharing
- Opportunities for collaborative marketing
- Business planning & development training, advice & assistance
- General business skills
- Assistance with Grant Funding opportunities
- Customer service & sales training, advice & assistance
- Marketing & promotions training, advice & assistance
- Social media management training, advice & assistance
- Tourism research / data / trends

Scale: 0.0% – 80.0%

What specific challenges or barriers exist to growing or improving the tourism and visitor areas of businesses?

Categories (bottom to top):
- Not sure of viability
- Lack of business skills
- Lack of qualified staff
- Current award penalty rates
- Location of my business
- Lack of funds
- Timing is not yet right
- Lack of visitor numbers
- Competition from others
- Lack of time
- Still developing product / service
- Lack of tourist accommodation
- Lack of public transport
- Nothing

Scale: 0.0% – 60.0%

Appendix D:

SATC Data

DOMESTIC VISITS

REGIONAL SA
3.8M VISITS
13.4M NIGHTS

ADELAIDE
2.6M VISITS
8.5M NIGHTS

6.1M TOTAL VISITS
21.8M TOTAL NIGHTS

ADELAIDE HILLS
184,000 VISITS
436,000 NIGHTS

BAROSSA
171,000 VISITS
331,000 NIGHTS

CLARE VALLEY
182,000 VISITS
428,000 NIGHTS

EYRE PENINSULA
369,000 VISITS
1.3M NIGHTS

FLEURIEU PENINSULA
715,000 VISITS
2.2M NIGHTS

FLINDERS RANGES AND OUTBACK
628,000 VISITS
2.7M NIGHTS

KANGAROO ISLAND
112,000 VISITS
450,000 NIGHTS

LIMESTONE COAST
539,000 VISITS
1.7M NIGHTS

MURRAYLANDS
277,000 VISITS
667,000 NIGHTS

RIVERLAND
367,000 VISITS
1.0M NIGHTS

YORKE PENINSULA
527,000 VISITS
1.8M NIGHTS

Source: National Visitor Survey,
Tourism Research Australia, SA Year End June 2016

South Australian Tourism Commission

NATIONAL VISITOR SURVEY

$5.0B
June 2016
↑9.6% = $439M
↑6.6% NAT AVG

$4.6B
June 2015

$4.5B
June 2014

DOMESTIC EXPENDITURE GROWTH

6.1M
June 2016
↑7.7%
↑6.8% NAT AVG

5.6M
June 2015

5.3M
June 2014

DOMESTIC VISITS GROWTH

13.2M
June 2016
↑18%

DAYTRIPS

NATIONAL VISITOR ORIGIN

INTERSTATE
Visits 2.2M ↑8.1%

INTRASTATE
Visits 3.8M ↑7.5%

WESTERN AUSTRALIA
Visits 195,000 ↑4.4%
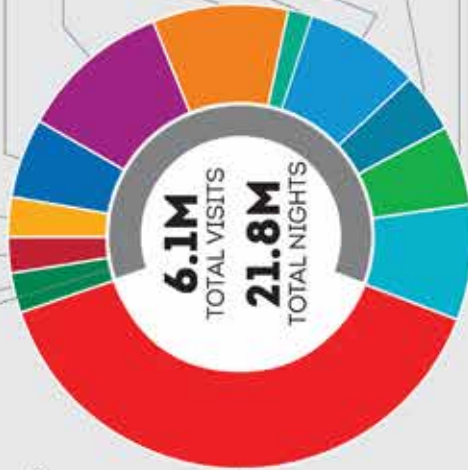
TOP 3 MARKETS

VICTORIA
Visits 960,000 ↑12.4%

NEW SOUTH WALES
Visits 581,000 ↓2.8%

QUEENSLAND
Visits 291,000 ↑2.8%

Comparing June 2016 to June 2015
WWW.TOURISM.SA.GOV.AU

ADELAIDE SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission

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SATC, page 3 - Knights Beach, Port Elliot

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SATC, page 13 - Cycling

SATC, page 21 - Spirit of the Coorong Cruises

SATC, page 24 - Picnic at The Winehouse

SATC, page 28 - Lake Alexandrina and countryside

SATC, page 30 - Near Murray Mouth

SATC, page 31 - Whale watching

SATC, page 33 - Canoe the Coorong

SATC, page 42 - Vineyards

SATC, page 46 - Camping

SATC, page 59 - Port Elliot jetty

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Graham Scheer, front cover - Cockle train

Tourism Australia, pages 15 & 52 - Cockles and Sand dunes, Coorong National Park

Fleurieu Peninsula Tourism/SATC, page 15 - Surfing at Middleton

Hains and Co, page 16 - Fleurieu food platter

Kate Elms Photography, page 18 - South Australian Wooden Boat Festival

Benjamin Neville, page 34 - Off Piste 4WD Tours

Iain Morton, page 54 - Ringbalin, Goolwa

Muhummad Rashid, page 62 - Rural landscape

CONNECTING COMMUNITIES

HOW TO CONTACT US

11 Cadell Street, Goolwa

PO Box 21
Goolwa SA 5214

www.alexandrina.sa.gov.au

08 8555 7000 F| 08 8555 3603

alex@alexandrina.sa.gov.au

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AlexandrinaCouncil

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