# RIVERLAND TOURISM PLAN 2030

The lands and waters of the River Murray, or Murrundi, are central to the culture and beliefs of the Traditional Owners, who have occupied, enjoyed, utilised and managed the Riverland area since the Creation.

The Riverland Tourism Industry acknowledge the First Peoples of the River Murray and Mallee Region are the Traditional Owners and that we respect their spiritual relationship with their country.

We pay our respects to their elders, past and present.

We acknowledge the Aboriginal people who continue to care for this country today.

We honour their stories, songs, art, and culture, and their aspirations for the future of their people and these lands.

We respectfully encourage Aboriginal communities to be a part of the current and future success of the Riverland Visitor Economy.

# Contents

# Stakeholders in the Riverland Tourism Plan 2030

As stakeholders in the Riverland Visitor Economy, we are proud of the Region and the experiences it offers to residents and visitors. Tourism is a significant industry within the Riverland economy, with an annual expenditure of over $180 million, it is vital to the vibrancy of our communities and the on-going prosperity of the region. The positive economic impact of tourism is broad ranging from the more than 300 direct tourism businesses to the facilities and services utilised by local residents and visitors alike. The growth of social and cultural experiences in the region delivers a greater range of economic opportunity for residents and significant local employment opportunities for all. As stakeholders we look forward to working with each other, Riverland communities, Destination Riverland and local businesses to continue to grow the Visitor Economy towards 2030.

**Peter Hunt**
Mayor

**Neil Martinson**
Mayor

**Leon Stazinowsky**
Mayor

**Dave Burgess**
Mayor

**Brenton Pankhurst**
Chair

**Neil Martinson**
Chair

# Message from the Chair of Destination Riverland

The Board of Destination Riverland, along with the region's stakeholders in the Visitor Economy are proud to introduce the Riverland Tourism Plan 2030 (RTP2030). The Visitor Economy has experienced significant growth over the past 6 years, from an annual contribution of $140 million to over $180 million in 2019. This plan will support the Riverland Tourism industry to work collaboratively toward the 2030 target of $317 million. This target aligns with the South Australia Tourism Plan 2030 and Regional Visitor Strategy 2025. The key opportunities outlined in RTP2030 are the result of extensive analysis by the appointed consultants and broad community and stakeholder consultation. The Board of Destination Riverland congratulates business operators, local Government, and industry stakeholders who are investing in the Riverland Visitor Economy. The Board of Destination Riverland looks forward to working with all the Region's stakeholders to deliver on this plan.

**Brenton Pankhurst**
Chair

# RIVERLAND TOURISM PLAN 2030 AT A GLANCE

The stakeholders of the Riverland tourism region (The Region) recognise the increased importance of the visitor economy within their planning frameworks, and as such have commissioned Tourism eSchool to develop a 2030 Riverland Tourism Plan (The Plan) for the Region with the aim of articulating a shared vision for the growth of the sector for the Region.
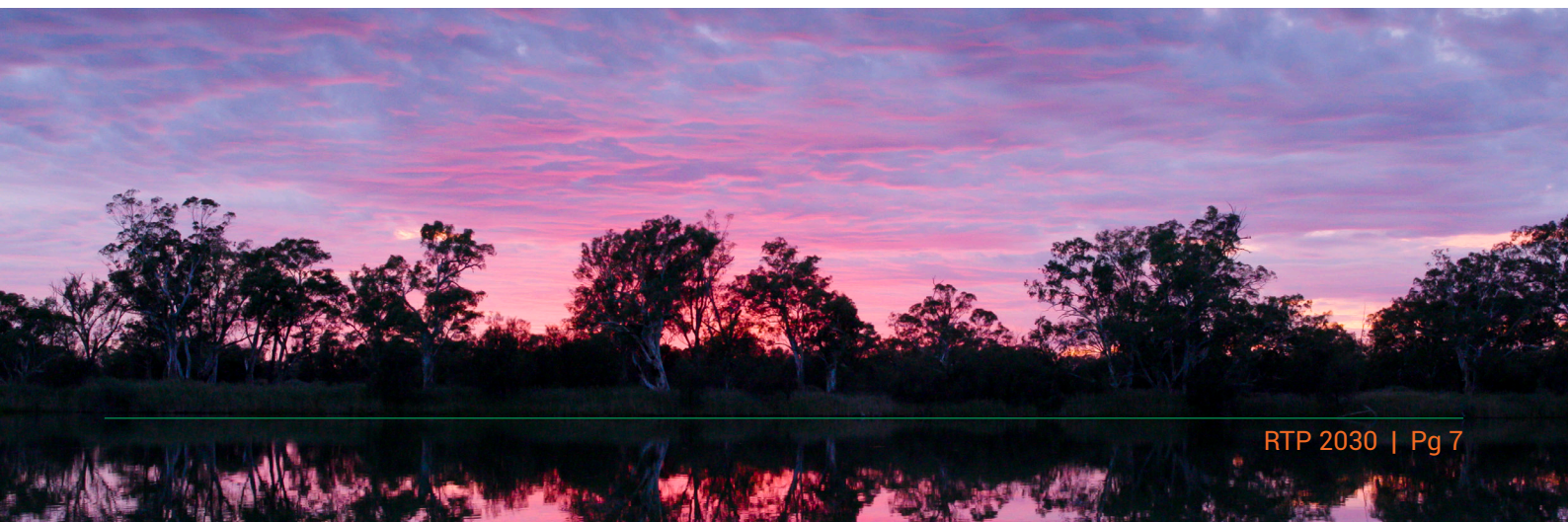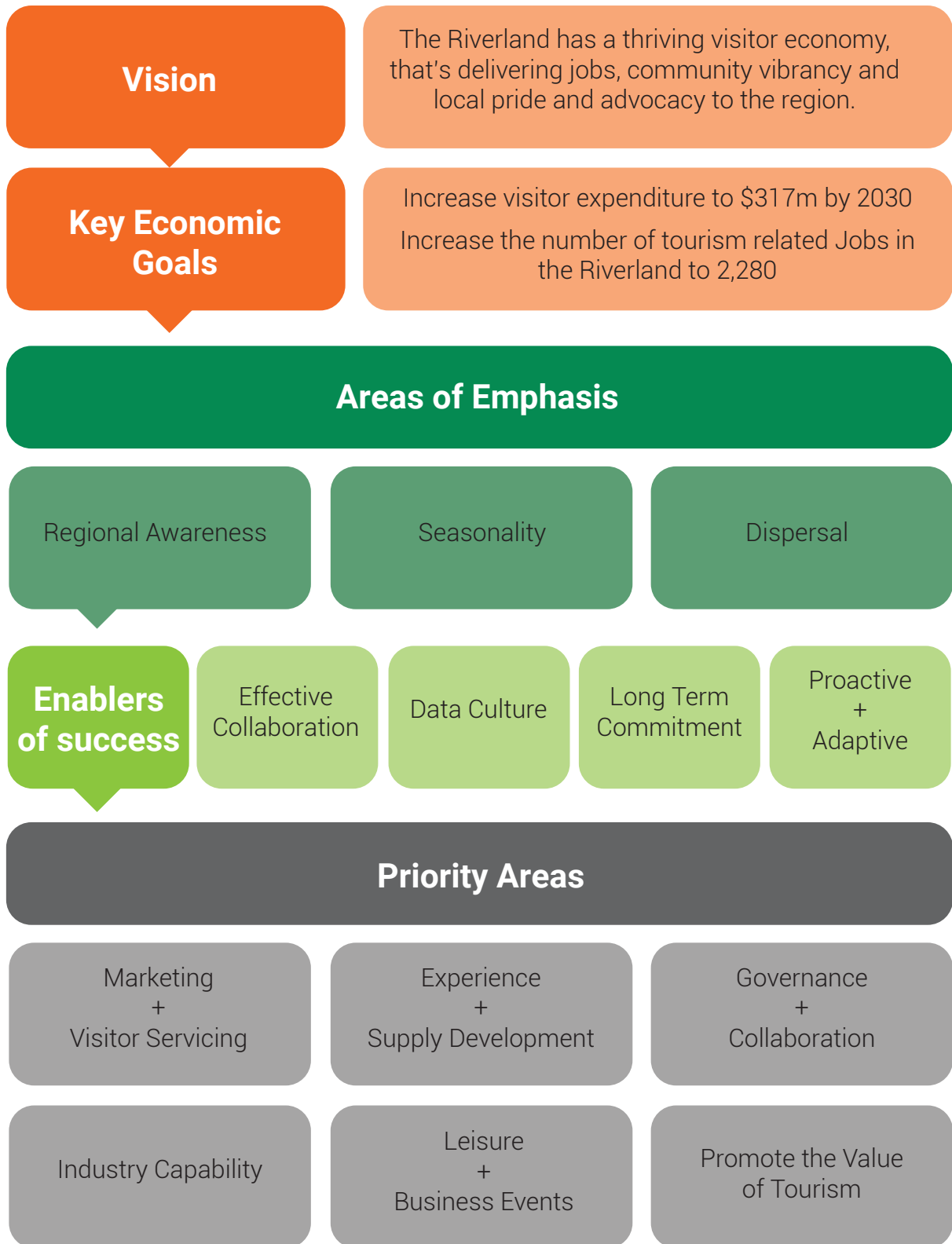
The first step in the development of this Plan was first to establish a 'Destination Situation Analysis', which involved consultation with all levels of industry, to ensure all available information was considered to draw realistic conclusions. Consultation included one on one meetings with various stakeholders (all levels of industry and government), community workshops, and an online survey with industry (see Section Acknowledgements).

In addition to stakeholder consultation, Tourism eSchool identified all the key internal and external stakeholders' roles and responsibilities, analysed the current visitor data insights, tourism market segments, product, access, infrastructure, marketing, branding, resourcing and visitor servicing within the Region, and from this, have formulated the Region's strengths, weaknesses, threats as it relates to growing the visitor economy over the coming decade.

From this analysis, major opportunities have been identified for effective and sustainable visitor economy growth which were considered in the development of this 10 Year Plan.

## Vision

The Riverland has a thriving visitor economy, that's delivering jobs, community vibrancy and local pride and advocacy to the region.

## Key Economic Goals

Increase visitor expenditure to $317m by 2030

Increase the number of tourism related Jobs in the Riverland to 2,280

## Areas of Emphasis

| Regional Awareness | Seasonality | Dispersal |
|---|---|---|

## Enablers of success

| Effective Collaboration | Data Culture | Long Term Commitment | Proactive + Adaptive |
|---|---|---|---|

## Priority Areas

| Marketing + Visitor Servicing | Experience + Supply Development | Governance + Collaboration |
|---|---|---|
| Industry Capability | Leisure + Business Events | Promote the Value of Tourism |

# WHY THE VISITOR ECONOMY MATTERS TO THE RIVERLAND

The Visitor Economy is a super growth sector and is now a key contributor to the economic prosperity of South Australia. Since 2013, the South Australian Visitor Economy has grown 2.5 times faster than the State's overall economy. On the back of expenditure growth in the Visitor Economy, jobs have likewise surged, up 15% for the sector, while overall employment in South Australia grew by 1%.

This is great news for the Riverland, as a booming state industry means more opportunity for a thriving regional visitor economy.

Growth of the Riverland's visitor economy will transform the Region's communities. New job prospects, secured livelihoods, new business opportunities, career paths for school leavers, vibrant main streets, more investment by Councils in the livability of their municipalities, and less reliance on traditional industries to support families will be the result of a flourishing visitor economy.

# RIVERLAND VISITOR ECONOMY STATE OF PLAY

**The visitor economy is now recognised at all levels of government in Australia as an intrinsic, sustainable and driving part of economic development. It creates long term improvements in the liveability of regional towns and rural life and significantly improves the prosperity of Australian communities.**

Tourism has been identified in Australia's 'next wave of prosperity' as one of the top five sectors of economic growth and has the potential to become Australia's fastest growing industry.

In South Australia, tourism continues as a key driver of the state's economy. The South Australian Tourism Commission (SATC) has recently launched their 2030 strategy, which is focussed on achieving the South Australian tourism industry's full potential of $12.8b of visitor expenditure.

With such a diverse and exciting range of tourism experiences, the Region's visitor economy is increasingly becoming one of its major economic beacons, contributing $180million at the December 2018 quarter, which has been trending positively for the past 10 years.

Overnight visitation to the Region is also steadily growing (from 267,000 in FY2012 to 392,000 FY2018), and currently attracts an average of 8% share of total overnight visitation to South Australian regions.

Forecast data available from Tourism Research Australia has highlighted steady growth for overnight visitation to Regions, which coupled with a great number of opportunities identified in the Situation Analysis to drive demand through strategic marketing and experience development, suggest there is certainly potential to grow visitor yield, numbers, intra-regional dispersal and length of stay for the Region.

Whilst forecasts are available, they were made well before the world entered into the Global Coronavirus Pandemic (COVID-19), therefore, the future rebound prospects for all global visitor economies is still relatively uncertain. The Region maintains a strong competitive advantage through its experience profile and pre-COVID-19 performance, which will help it rebound into a new phase of growth when society reaches its new normal.

# THE APPEAL OF THE RIVERLAND

## The Murray River – Serenity AND Adventure

The Murray River is the hero experience of the Riverland, and is known for its stunning scenery of ochre cliffs, big red gums, clear night skies and colourful, reflective sunrise and sunsets over tranquil waterways.

The Riverland's section of the Murray River is a base for a wide range of outdoor experiences for people wanting to connect with nature and wildlife or have more active outdoor adventures. Experiences it's renowned for include kayaking, bushwalking, fishing, boating, birdwatching and water-skiing. These experiences can be accessed by visitors through tour operators, local towns, the Murray River National Park and its network of game reserves, conservation parks and Crown Land.

The Riverland's accommodation also allows visitors an immersive Murray River experience. Visitors can stay on the Murray River via houseboats throughout the Region, or overlooking the tranquil waters of the River through a wide network of bush camping, holiday parks, motels, farmstays, River Shacks and luxury self-contained accommodation options.

## South Australia's Food and Wine Bowl

The Riverland is South Australia's food and wine bowl thanks to its Mediterranean climate and fertile irrigated soil. It is also Australia's largest wine growing region. Its fresh seasonal fruits and vegetables, unique beers and ciders, plus innovative cellar door, brewery and distillery experiences are attracting growing acclaim from locals and visitors alike. Many of these products are available at a growing number of cellar doors, roadside stalls, local cafes, restaurants, supermarkets and are also used by many accommodation and tour operators in the Region to strengthen the Region's food story.

## Events and Festivals

The Riverland's strong year-round calendar of festivals and events are driving visitation across a wide area of interest areas, ranging from watersports, sporting tournaments and carnivals, living history festivals, food and wine, flower festivals, commando courses, festive season events and regular markets and public holiday celebrations.

# Other Drivers

The Region's rich heritage and the supporting experiences for visitors is what makes the Riverland unique to other parts of the Murray River. While the Region's indigenous experiences are growing, there is a rich collection of Post European settlement stories of the early paddle steamers era, innovative pioneering irrigation settlers, Loch development, world wars, floods and post-war soldier settlers can be explored by visitors through Riverland towns, pubs, trails, walks, drives, museums, paddle steamers and wharfs.

Central Riverland towns of Waikerie, Loxton, Berri, Barmera and Renmark are bustling country towns, and are the hubs for much of the Region's accommodation offerings. They also support visitors through their town main street retail strips, visitor centres and a growing number of cultural and public art attractions that help round out the Riverland visitor experience.
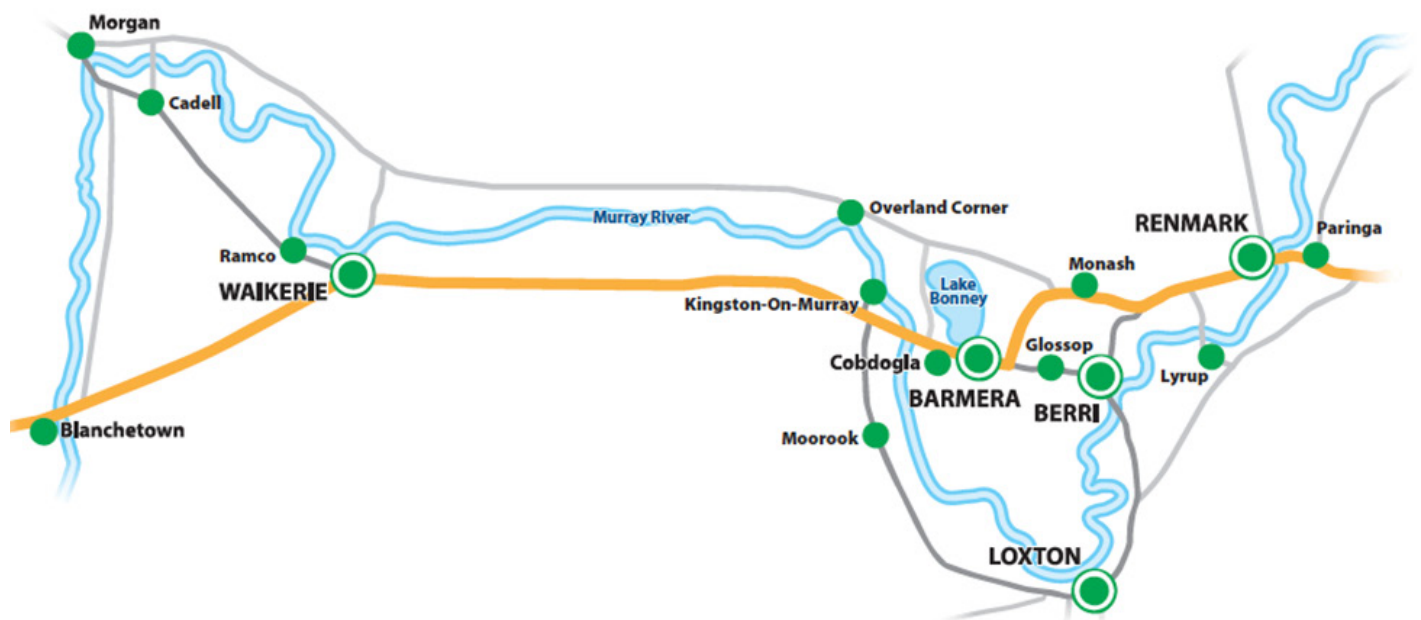
# Challenges the Riverland faces

## Parochialism

There is a strong 'us vs them' mentality between Riverland towns and communities, hampering proactive collaboration with regard to funding, human resourcing, events, visitor servicing and marketing.

## Funding

Short funding cycles makes it hard to plan and look long term in the Region's visitor economy. Imbalances in funding allocations into the visitor economy are also hampering the Region's growth potential.

## Under activation of key experiences

For the Region's higher value visitors, access to Murray River experiences without the right equipment can be a challenge (ski boats, camping, water equipment), as can be accessing immersive, personalised food, wine and beverage experiences outside of a few core businesses.

## Competition

The domestic tourism market is experiencing increasing competition with a short-term shift to intrastate and interstate.

## Disruption of COVID-19

Social distancing measures implemented through the COVID-19 pandemic have decimated many parts of the travel sector, and will continue to impact future plans. Limited access to available funding for industry, reduction in revenue for government funding partners, business and consumer confidence, willingness and financial ability to travel by visitors, and the availability of tourism experiences, including business and leisure events are also impacts that will be felt by the industry for the long term.

## Governance of the Visitor Economy

There are many stakeholders investing significantly in the visitor economy, with no cohesive, collaborative plan to work towards. Stakeholders and industry are unsure of their remit, often working in silos, and duplicating efforts.

# Key Opportunities

## Consumer Direct Marketing

Consolidate and align consumer direct marketing to the Region's high yield visitor personas and niche interest segments to build long-term sustainable demand for the Region. A strong focus on storytelling and advocacy for the Region's experience strengths of Murray River Experiences, Nature Based, Food/Wine/Beverages and Events, as well as the Region's seasonal strengths to drive visitation throughout the year.

## Events

Events are key demand drivers for visitation to the Region in many diverse interest areas. Therefore, supporting existing events, activating new events cross the Region that build on the region's strengths areas of leisure, sport and business are major opportunities for driving demand, dispersal and evening out seasonality.

## Experience Development

Continued development of immersive, high quality experiences across the Murray River's nature based experiences, including the Murray River National Park offerings; food/wine/beverages, history, heritage, arts and culture, combined with quality and experiential accommodation, will drive increased demand, and also strong word of mouth advocacy with the Region's high yield visitors and niche interest/market segments.

## Collaborative Visitor Servicing

Evolving the Riverland's visitor servicing resources to better serve visitors, but also industry,  to collaborate on projects such as visitor collateral, events support, online and outreach visitor servicing will be key to drive dispersal, spend and length of stay for all sectors of visitors into the Region.

# THE VISITOR TODAY

The Riverland has been attracting an increasing number of visitors to the region since 2012. Visitor sentiment echoes the Region's experience strength, highlighting the mighty Murray River as the hero attraction, along with experiencing the regional food, wine and beverage delights.

Currently the Riverland attracts visitors mainly from South Australia, and from that predominantly those living in Adelaide. The Region also attracts visitors from Victoria and NSW to a lesser degree, with a very small portion of visitors from international markets.

People usually visit the Riverland for a holiday, or to visit their friends and family, and typically stay up to 3 nights. There is also a very small contingent of people who visit from overseas, mainly on holidays or to gain short term or seasonal employment.

**392K**
Overnight Visits

**1.33m**
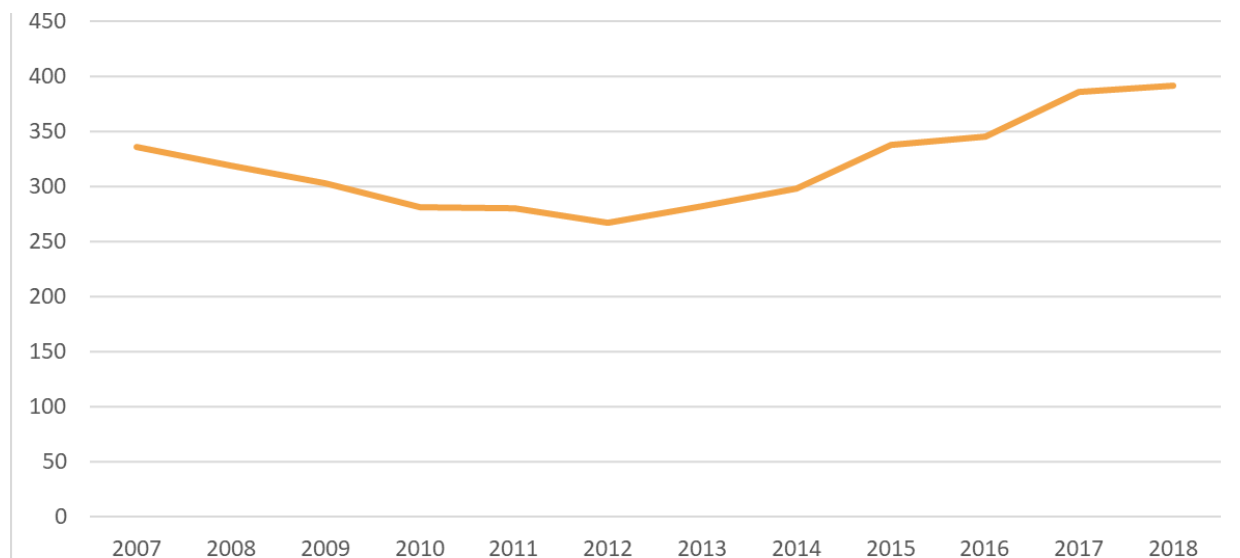Nights

**400K**
Day Trips

**3 nights**
Average Length of Stay

**Total Overnight Visitors Timeline (YE DEC 2007-YE DEC 2018)**



*Data source: SATC Riverland Regional Tourism Profile 2016-2018*

**98% Domestic**
79% SA Residents
12% Victoria
5% NSW
4% Other

**61% Holiday**
**24% VFR**

**44%**
55+ y/o
3 nights
ALOS

**2% International**
48% Europe
19% UK
12% NZ

**66% Holiday**
**22% VFR**
**11% Workers**

**48%**
25-34 y/o
55-65 yo
25 nights ALOS

# THE FUTURE VISITOR

**As the globe adjusts to a new normal living with COVID-19, the industry anticipates slight changes in visitor behaviour as they plan their upcoming holidays:**

- People will seek out opportunities for increased connection with their friends and families, along with getting out of routine to reconnect.

- Whilst people are very keen to travel again, they will initially be limited to, and possibly choose to travel close to home initially, prior to venturing interstate, with international travel completely off the cards for the near future.

- As borders open up though, people will increasingly be looking for experiences that offer a safe way to travel, with social distancing measures and COVID-safe plans in full force.

- Given the uncertainty of COVID-19 restrictions and their long-term freedoms, people will also be looking for booking flexibility, along with a preference for supporting local businesses by booking direct, rather than the convenience of using online travel agents.

- COVID-19 completely disrupted our usual way of communicating and as such, throughout the initial stages of the pandemic society experienced widespread adoption of digital communications platforms. This was seen particularly in demographic cohorts who were not so digitally savvy prior COVID-19. It is envisaged that this uptake of digital adoption will be maintained into the future, and therefore the way people plan and book travel.

- Everyone in the world is experiencing the impact of COVD-19 in varied ways, and this will impact how they feel about the security of their livelihoods, and their mental and physical health. This along with their financial position will impact their future trave aspirations.

## Whilst there will be some nuanced travel behaviours due to the pandemic, the underlying motivations for travellers will remain a constant:

- People are increasing seeking out truly authentic travel experiences – something that is unique for them, that addresses their travel motivations and challenges specifically. They no longer want a cookie cutter experience, they want to immerse themselves in culture, live like a local, and seek out lesser known experiences, they want to walk away feeling transformed.

- People are more conscious and considerate to how their presence and pennies impact the local community and environment, and people now prioritise and support businesses and experiences that have initiatives in place that have a sustainable focus for the environment.

## The SATC also highlight some state specific traveller trends which will also need to be considered in the context of the Riverland region:

- The expectation for 'On Demand' services will only increase through to 2030. Expectations of travellers for personalised, high quality experiences with short lead times will represent both an opportunity and a challenge for tourism businesses, particularly regarding opening hours, seasonal operations and the availability of skilled labour.

- With Australia's aging population, the Baby Boomer generation will continue its insatiable thirst for travel experiences. The typical visitor in ten years' time is likely to be, on average, older than those of today.

- A 'typical visitor' will become increasingly challenging, with a more ethnically diverse visitor mix demanding a range of appropriate visitor experiences.

- It is impossible to predict the direction that technology will take us in the next 10 years, but we do know it will to be disruptive and present new opportunities and challenges. Visitors from across the globe will bring with them expectations of tourism businesses embracing the new technologies and digital platforms that emerge.

The Riverland has the potential to capitalise on the new traveller trends and behaviours by continuing to develop and leverage its natural assets and diverse combination of experiences, along with a strategic refocus of initiatives and resources to ensure the Region's visitor personas are supported throughout their whole travel purchase journey.

# THE AMBITION

## Measuring the Value of the Visitor Economy

**For the Riverland, a thriving visitor economy means more jobs for locals, sustainable businesses and population growth.**

Measuring the value of tourism for the Riverland is multi-pronged. There are a number of relevant data sets available for the Region that can be used as 'indicators of growth'. Available indicators for analysis include:

• Visitor Yield

• Visitation Data

• Jobs, Businesses, Population Growth

Other metrics that destinations should take into consideration, to measure the impact of the implementation of activities include:

• Visitor Sentiment

• Visitor Spend Tracking

Local sentiment is another key indicator of the success of a destination visitor economy. Business sentiment, social license for experience development and local advocacy for the towns and the Region in which people live are three of biggest indicators for destinations to consider.

# Visitor Yield Targets

**Visitor yield is one of the best indicators to determine the growth of a visitor economy, as increasing visitor numbers doesn't necessarily result in a growing economy.**

Increasing visitor numbers can also be counter-productive in building a sustainable experience offering, especially in regions like the Riverland, where the natural environment is the Region's competitive advantage.

Within the South Australian Visitor Economy Sector Plan 2030, the SATC has identified an ambitious target for the Riverland, which is to grow the visitor economy to $317m by 2030.

This target was set pre-COVID-19, which has already been impacted and will continue to hinder the visitor projections used to determine the target that SATC set for the Region.

So, whilst this target will remain as a key economic ambition for the Region, it will be reset once new visitation projections are available.
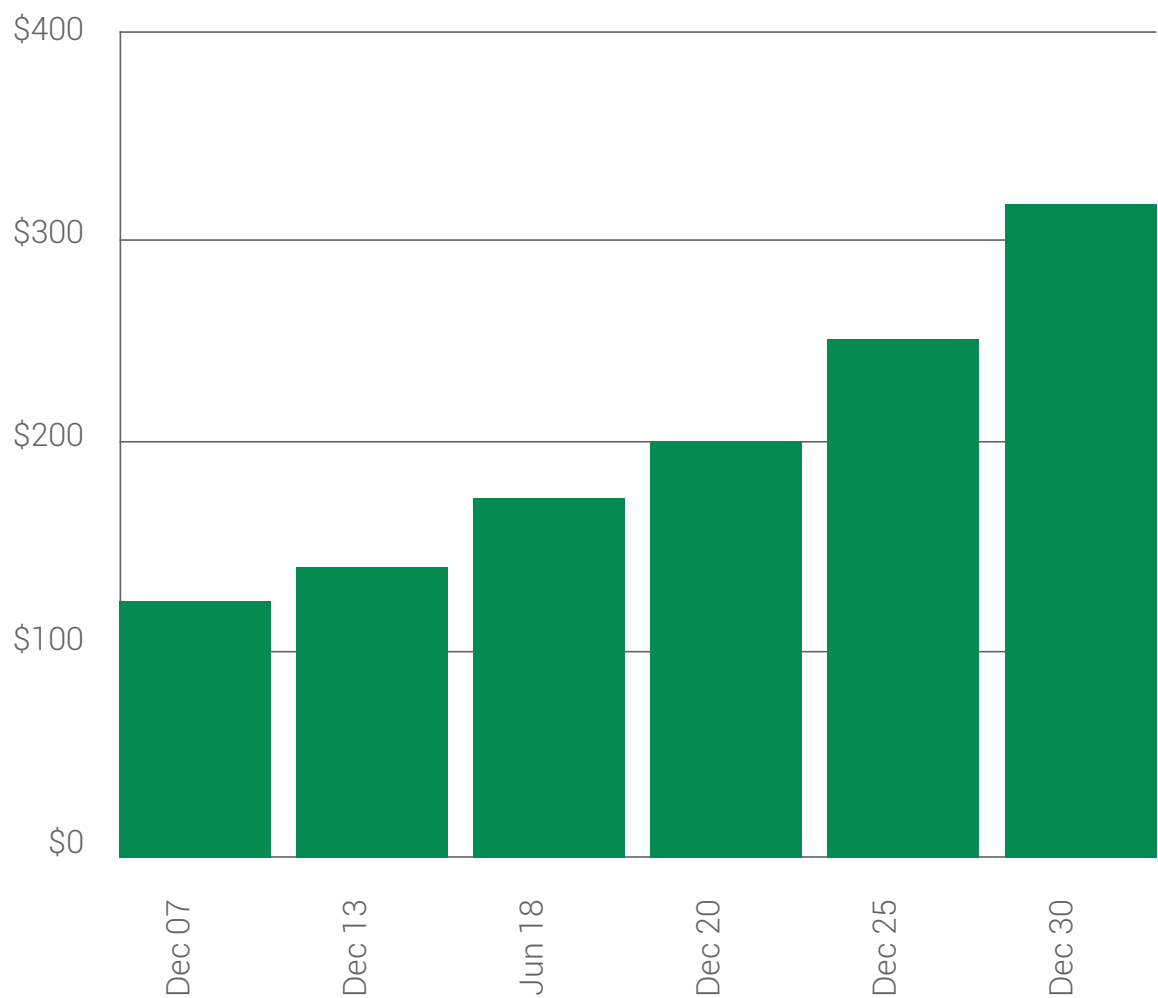
# STRATEGIC DIRECTION

## The Six Strategic Priority Areas

The Plan has been developed based on six strategic priority areas:

**1** **Marketing + Visitor Servicing**

**2** **Experience Supply + Development**

**3** **Collaboration**

**4** **Industry Capability**

**5** **Leisure and Business Events**

**6** **Promote the Value of Tourism**

The priority areas align with the SA Visitor Economy Sector Plan 2030. Sitting under these priority areas are strategies to be implemented within recommended timeframes (Immediate, Short, Medium, Long Term, Ongoing) by the Region's stakeholders to ensure the strategy becomes a reality.

# Who we will Target

## The initiatives within this Plan will focus on driving demand from three High Yield Visitor Personas:

These three visitor groups are most likely to stay longer and spend more. They also importantly have the greatest affinity with the visitor experiences that the Riverland offers, and they therefore have the greatest likelihood of becoming fans and advocates for the Riverland, both on and offline. This is important because advocacy is the most trusted form of marketing for a travel destination.

### Older Couples, No Children

This persona is probably the most lucrative segment, whereby, they represent a cohort of travellers with the highest household net wealth (domestically) and potential to spend more than double on accommodation than the Young Couples (Millennials).

### Younger Couples, No Children

This persona represents the Millennial-Generation Z traveler - young, carefree, career driven, and an 'aspiring NEO'. Typically, this persona may know a little about the Region, but is drawn to the destination mainly to attend a particular event and will likely stay a couple of nights.

### Families with Children

This persona, whilst still a Millennial, was once a 'Young Couple, No Children' persona, and has developed into an 'Affluent Family' persona post starting a family. They still have the identical interests, and align with the same experience themes, with a family friendly nuance. They are often travellers who return again and again to the Region once they fall in love with it, and then bring extended family or friends.

Accompanying this Plan are journey maps for each of the identified Visitor Personas. These Maps outlines explicitly the opportunities to engage and convert them along their travel purchase journey.

# Enablers of Success

## Adaptability

Stakeholders in the region need to recognise that the world is moving at a rapid pace. The success of the Visitor Economy will come down to how a region can respond to change, or how quick they can identify and grasp an opportunity, with time being the key determinant. Therefore, stakeholders of this plan need to ensure processes are in place to govern the plan with a level of flexibility, and support each other to make bold moves quickly.

## Effective Collaboration

For this plan to be successfully actioned, it is essential that all stakeholders work together under the principles and practices of effective collaboration, ensuring the roles and responsibilities of all stakeholders are participative and complimentary.

For this to occur all stakeholders need to apply the vision for the whole Region as a lens over all investment in the visitor economy, and proactively participate in an effective and efficient communication and reporting mechanism.

## Data Culture

In order to make sense of the investment in the visitor economy, the region will need to commit to embracing and investing in a data driven approach. This applies across all strategic priority areas and is vital to enable better decisions, education, advocacy, perception and governance.

Central to this is a laser focus on monitoring, measuring and reporting on the implementation of this plan, and an emphasis on celebrating success, as recognition of success will breed success.

## Long Term Commitment

Long term plans need a long-term commitment. A commitment to appropriate levels of funding to activate projects within the Plan will be required to achieve the Plan's vision. Some of the opportunities within the Plan will span the length of the Plan and will require dedicated long-term resources to fulfil their potential.

# Areas of Emphasis

Three areas of emphasis are highlighted as important opportunities that require focus within this Plan. These will be addressed throughout the Action Plan as they have the potential to influence the growth of the visitor economy for the Region.

## Regional Awareness

A key challenge identified by many stakeholders in the Region is while visitors to the Region love the many and varied experiences on offer, for many visitors, they find out this information too late, and only when they are in Region.

By then it is often too late for them to stay longer as their trip plans are already locked in for the rest of their visit. This will be addressed through marketing and advocacy activities that target the Region's High Yield Visitor Personas in the dreaming and planning stages of their visitor purchase journey.

## Seasonality

Many stakeholders also identified seasonality as a key challenge for their businesses, with the quieter seasons of Summer being perceived as too hot for many visitors, and also the destination not having the perception as winter destination, which is a key positioning opportunity for the Region.

This is a significant challenge to their profitability, to being able to employ quality staff year-round and being open when visitors expect them to be open. This will be addressed through better promotion of the region as a year-round destination, promotion of events, and better storytelling of the Region's off-peak experiences.

## Dispersal

The Region is large and dispersed, and many visitors don't travel too far from Renmark, Barmera and Berri. By improving the dispersal of visitors around the Region, we can ensure everyone benefits from tourism.

Marketing intra-regional itineraries, product development, better communication of experiences available throughout the Region and advocating for referrals through the visitor servicing network in South Australia and Victoria (North West) will improve the dispersal of visitors once they are in region.
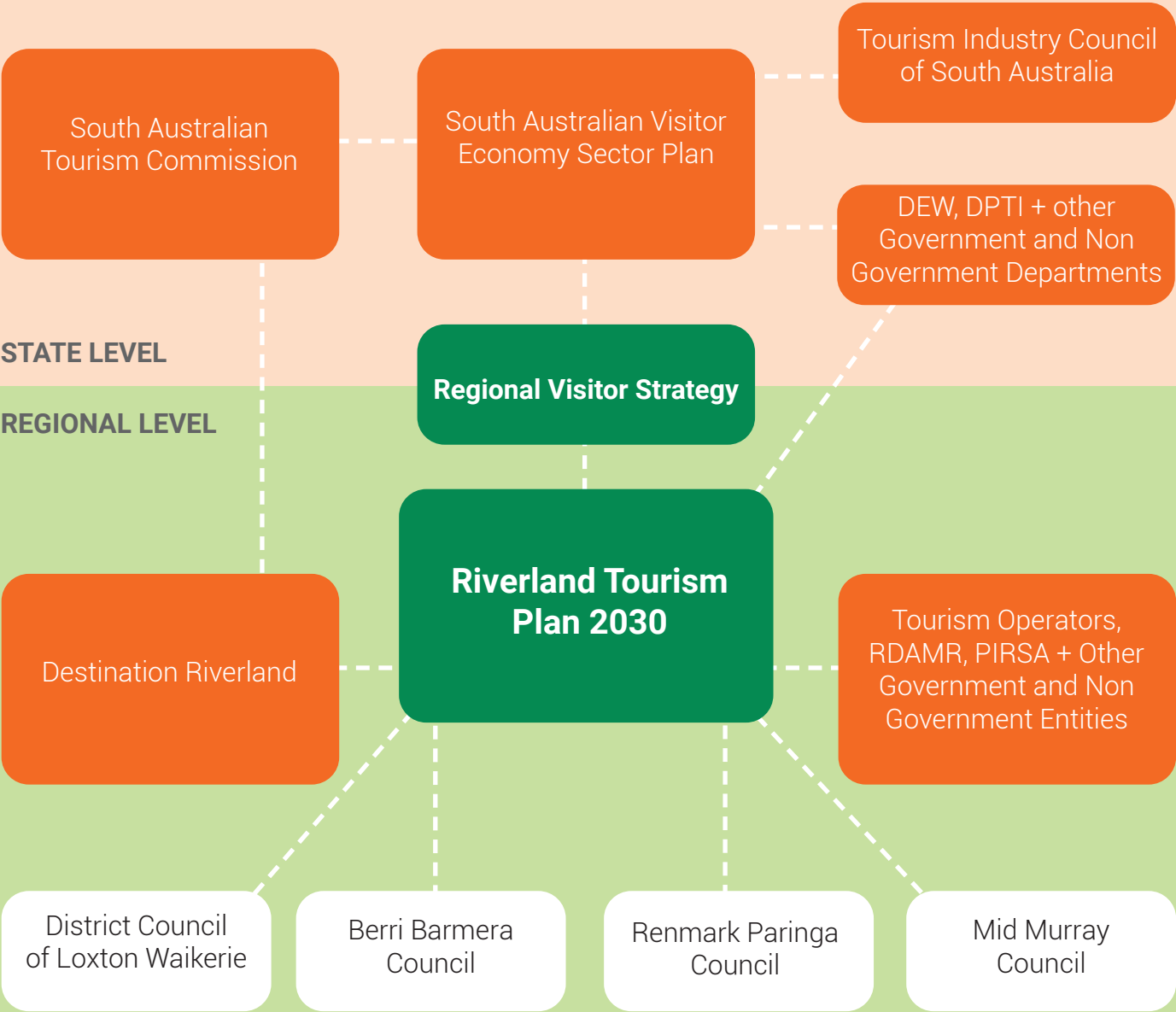
# Stakeholders

As Destination Riverland is the peak body for the visitor economy, they are by nature, the custodians of this Plan. However, the Strategies and actions within the Plan are recommended to be led and supported by various stakeholders within the Region, including Local Government, Industry Associations, Regional Development Australia, Riverland Wine and State Government department.

*Note: The 'Riverland Destination Situation Analysis August 2020' will need to be consulted by stakeholders responsible for this Plan's implementation in order to provide context to the opportunities outlined in the Strategic Priority Areas.*

**STATE LEVEL**

**REGIONAL LEVEL**

- South Australian Tourism Commission
- South Australian Visitor Economy Sector Plan
- Tourism Industry Council of South Australia
- DEW, DPTI + other Government and Non Government Departments
- Regional Visitor Strategy
- **Riverland Tourism Plan 2030**
- Destination Riverland
- Tourism Operators, RDAMR, PIRSA + Other Government and Non Government Entities
- District Council of Loxton Waikerie
- Berri Barmera Council
- Renmark Paringa Council
- Mid Murray Council

# THE SIX
# STRATEGIC PRIORITIES

Six Priority areas provide a framework for achieving the Strategic Goal and Major Key Performance Indicators set out in this Plan. Key Strategies, Stakeholders and Timeframes are identified for each Priority Area.

*NOTE: The 'Riverland Destination Situation Analysis' provides full background to the Strategies within these priority areas and is essential reading for Stakeholder implementation.*

# Priority Area 1:
# Marketing + Visitor Servicing

## The Mission

To communicate inspiring and factual information about the destination to the Riverland's high-yield visitor personas throughout their whole travel purchase journey, to drive demand, increase length of stay, spend, and dispersal around the Region.

## What Action is Required

Over the past 10 years there has been a fundamental shift in the way people plan and book travel. Their touchpoints for finding answers to their travel questions reach far and wide, from recommendations from friends and family, through to social media and digital review platforms, and talking to locals whilst in Region.

This means the once autonomous marketing and visitor servicing arms for a destination, begin to intersect, as communicating to the visitor, whether they are in a destination or not, is happening primarily in the palm of one's hand.

Sharing visitor sentiment and communicating the Riverland's unique experiences will be the cornerstone to driving growth of the visitor economy.

There are two major initiatives for the Region when it comes to direct to consume marketing.

Firstly, the development of a Brand Strategy for the Riverland which reflects the destination's brand DNA, but also echoes the sentiment from visitors to the Region. The implementation of such a strategy will form the basis of all direct to consumer marketing, through the development of key messages and storylines. It will support industry to better tell their Riverland story, and will offer an identity for the Region, which will help to unify all of the places and spaces where visitors eat, drink, see and do.

The second opportunity will be to develop a strategic Marketing and Communication Plan which highlights strategies and tactics to drive demand from the region's High Yield Visitor Personas, Niche Interest Segments and Markets. Activating this Marketing and Communication Plan will require a laser focus on the touchpoints of the Riverland's visitor personas, in addition to proactive liaison with key stakeholders including industry, SATC and neighboring regions.

Visitor servicing will also need to be reimagined for the Region. Implementing a visitor-centric approach, visitor servicing will need to extend well beyond a single point of engagement in a Visitor Information Centre. Servicing visitors requires a multi-faceted approach to ensuring visitors have all of the information they need to have an exceptional experience.

# How will We Get There

| No. | STRATEGIES | STAKEHOLDERS **Bold: to Lead,** *Italics: key supporter* Normal: to align/ support | PRIORITY |
|---|---|---|---|
| 1.1 | **Develop a destination brand strategy** that shares the uniqueness of the Riverland Region as a year-round holiday destination and reflects the sentiment from visitors and the Riverland communities<br>• Develop brand implementation handbook, and key messages for Riverland towns and industry sectors (horticulture, agriculture, viticulture etc).<br>• Activate the brand consistently through storytelling, product packaging, experience promotion, visitor collateral and signage<br>• Develop accurate, consistent and compelling key messaging around the Riverland's unique Murray River Story, the Health of the Murray River and First nations Stories in conjunction with key stakeholders.<br>• Educate industry on how to implement the Brand in their businesses<br>• Enhance and encourage additional activation of the 'Rivertimes' storytelling by local businesses and visitor advocacy<br>• Consideration of the learnings from the Riverland Trust Mark strategy as part of this project, ensuring an implementation aligns with the destination's overarching marketing and experience development goals. | **DR (TBC) or Project Committee** LG, RW, Industry Stakeholders, Community, Operators | Short term |
| 1.2 | **Develop and implement an annual strategic destination marketing and communications plan** to drive increased demand and appeal for the Riverland<br>• Review and enhance all marketing tactics ensuring all investment reflects the destination brand, inspires and is geared to convert the Riverland's Visitor Personas and niche interest and market segments<br>• Confirm the remit for marketing activities and messaging between all entities who communicate direct to consumers to reduce duplication and avoid confusion for visitors<br>• Enhance themed drive journeys across regional boundaries, to encourage regional dispersal and increase length of stay, as well as building partnerships with neighbouring and complimentary destinations<br>• Pro-actively leverage SATC marketing initiatives<br>• Initiate/leverage partnership marketing and visitor specific marketing tactics to grow market share from visitor personas, niche interest and market segments (eg. with regional stakeholders, local brands, media, neighbouring regions, OTAs, transport/accommodation brands)<br>• Increase opportunities to amplify the Riverland's stories on third-party touchpoints<br>• Report on the attainment of marketing KPIs and actions through a coordinated feedback mechanism. | **DR** LG, SATC, RW, Chambers of Commerce | Short term |

| No. | STRATEGIES | STAKEHOLDERS **Bold: to Lead,** *Italics: key supporter* Normal: to align/support | PRIORITY |
|---|---|---|---|
| **1.3** | **Develop and implement an annual visitor collateral plan** that will drive conversions, length of stay and disperse visitors around the Riverland.<br>• Review and consolidate visitor collateral for alignment to Riverland Visitor Personas and niche interest and market needs, address content and distribution gaps (intra-regional itineraries), alignment to Riverland visual identity and brand stories.<br>• Implement a strategic measurement plan (on and offline)<br>• Implement a strategic distribution plan for key visitor touchpoints (on and offline)<br>• Report on the attainment of visitor collateral KPIs and actions through a coordinated feedback mechanism. | **DR**<br>LG (Visitor Services), RW<br>Chambers of Commerce<br>Local Publishers | Short term |
| **1.4** | **Develop a new visitor servicing model for the Riverland**, and implement an financially efficient, effectively resourced, visitor-centric strategy to provide visitors with timely and accurate information whilst in Region.<br>• Undertake an audit to confirm current operational costs of visitor centres, to clarify current visitor servicing resources in the Region<br>• Deliver in-person, online and outreach visitor servicing where HYVP/Niche interests/markets expect it (including visitor collateral)<br>• Provide a concierge booking service (eg sports groups, group travel, major events)<br>• Run an ambassador program to engage locals + local businesses in welcoming visitors and providing visitor information. (ideally part of Riverland Ambassadors Program)<br>• Collaborative resourcing with relevant marketing and event stakeholders<br>• Collaborative visitor servicing opportunities with neighbouring regions (SA, Interstate) | **LG**<br>DR<br>Chambers of Commerce | Short term |

# Priority Area 2:
# Experience + Supply Development

## The Mission

Support the development and expansion of demand driving visitor experiences and maintaining access and infrastructure visitors and locals expect.

## What Action is Required

To drive demand and visitor advocacy, the Region needs high-quality visitor experiences. The Murray River is the Riverland's hero experience that drives visitation. While the Riverland has a solid nature based and adventure experiences based around the River, it needs to grow the quality and quantity of immersive Murray River experiences by both private and public stakeholders to help the Region stand out from other destinations along the Murray River. Ongoing investment in sustainable Urban Design, Placemaking and Trail networks by the Riverland's Councils will be key enablers of enhancing the visitor experience along the Murray River.

Whilst the Riverland is South Australia's food bowl and largest producer of wine in Australia, opportunities exist to further activate experiences for visitors through growth in quality farmgates, cellar doors, breweries, farm to plate experiences, to make the destination

stand out in comparison to other destinations who can compete on that experience theme.

Whilst the region has a range of accommodation options, opportunities to advocate for enhanced quality and quantity of experiential accommodation supply that meets the changing consumer trends is required, along with the need to host larger groups.

Several major projects are already in concept planning or development stage that have great potential to drive longer term future demand for the Region, including the Morgan Heritage Precinct projects and the Agri Food Tourism Development Program.

The new globally recognised International Dark Sky Reserve, also has great potential to drive demand once it's visitor experiences are developed and activated. There is also a major opportunity for a collaborative effort by community, industry and government to develop the Murray River National Park into a hero attraction for the Region.

Growing the Region's Arts, Cultural, Historic and Heritage offerings in its communities and tourism experiences are a key opportunity to offer visitors a truly unique, immersive Riverland experience.

From an access perspective, the Riverland

is a self-drive destination, therefore the Road network needs to be maintained to a high standard to allow visitors to safely and easily explore the Region. A signage strategy focusing on improving visitor experience, satisfaction, dispersal and length of stay within the Region will also be a key project to support visitors whilst in region.

Advocating for improved Broadband and Wifi blackspots in the Region will ensure visitors can easily plan, book and advocate for the Region when travelling around, and also allow for local businesses to connect to visitors more easily.

The Region's visitor experience extends into the realm of community, as they use all the public conveniences that are provided to locals, including parking, toilets, bins and electric vehicle charging points. It will be important that these amenities are well maintained, and even optimised where possible, in line with visitor expectations, as these experiences can impact a visitor's overall visitor sentiment for a destination.

# How will We Get There

| No. | STRATEGIES | STAKEHOLDERS<br>**Bold to Lead,**<br>*Italics key supporter*<br>Normal to align/support | PRIORI-TY |
|-----|-----------|----------------------------------------|-----------|
| **2.1** | **Progress key visitor experience projects for the Region already under way (funding/grant applications)**<br>• Riverland Trails Concept<br>• Morgan Historic Precinct + PS Canally<br>• Agri Food Tourism Development (AFTD) Program<br>• River Murray International Dark Sky Reserve | **Relevant project owners – LG, RDAMR, Industry**<br><br>*DR*<br><br>Operators | Short term (or as relevant per project stage) |
| **2.2** | **Advocate and support the development of existing/new <u>Nature Based and Outdoor Adventure</u> experiences**<br>• Murray River based experiences (canoe hire, boat hire, life jacket hire, wakeboard cable park, learn to ski/wakeboard, swimming beaches, river tours, Locks, passive river systems). Includes seasonal pop up businesses<br>• DEW Park visitor experiences (specifically Murray River NP)<br>• Wildlife encounter experiences (Kangaroos, Emus, Koalas, Wombats)<br>• Niche interest experiences – bird watching, fishing, 4WDriving<br>• Dark Sky tourism experiences – glamping, lookouts, trails<br>• Expansion of regional trail network – walking/cycling and canoe/kayaking.<br>• Indigenous interpretation and experiences | **DR**<br><br>*DEW, LGA's, SATC*<br><br>Landscapes SA, Operators, Community | Short term |
| **2.3** | **Advocate and support the expansion of existing/development of new <u>Food, Beverage and Produce experiences</u>**<br>• Farmgate/farm to plate experiences of Riverland hero produce (citrus, grapes, stone fruits, almonds) that offer hands on activities (picking oranges, pick figs cooking schools etc), including Farm Stays.<br>• Further activate the Riverland Taste trail<br>• Locally sourced food in restaurants<br>• Epicurean experiences in Morgan and Blanchetown<br>• River-based or river-front epicurean experiences<br>• Group experiences – MICE/Groups/Weddings<br>• Tasting Australia Riverland events | **DR**<br><br>*RDAMR, RW, SATC*<br><br>LGA's, Operators Community | Short term |
| **2.4** | **Advocate and support the investment of existing/development <u>of accommodation</u>** that delivers on the Region's strengths and attraction of high yield visitor personas and niche markets<br>• Camping – for high yield camping traveller requirements<br>• Experiential farm/station stays<br>• Houseboats – mooring/navigation/link to experiences<br>• Holiday park – family activities<br>• Luxury River accommodation – small/medium size<br>• Group accommodation – upgrade to existing or new stocks | DR<br><br>Operators, DEW, LG, SATC, HHA | Medium term |

| No. | STRATEGIES | STAKEHOLDERS<br>**Bold: to Lead,**<br>*Italics: key supporter*<br>Normal: to align/support | PRIORI-TY |
|---|---|---|---|
| 2.5 | **Advocate and support the development existing/development of new <u>History, Heritage, Arts and Cultural experiences</u>**<br>• Experiences that tell Riverland's historic timeline of stories to current day (first nation, paddle boats, early setters, irrigation, agriculture + locks, migrant settlers, world wars)<br>• Public art experiences that tell the Riverland's stories (public artworks, murals, pop-up local creative/artist)<br>• Leverage relevant state organisation programs (Country Arts, History Trust, National Trust)<br>• Indigenous interpretation and experiences | **LG**, DR, CA, HT, NT, Operators, Communities | Short term |
| 2.6 | **Deliver new/upgrade existing/maintain public assets and river infrastructure that supports** the visitor experience in Region, and encourages positive advocacy. | **LG, DEW**, DR | Short term |
| 2.7 | Advocate for the investment in the region's **road network** to support the touring market and visitation to and around the Region | **LG**, DR, DPTEI, RDAMR, Chambers of Commerce | Short term |
| 2.8 | Ensure all levels of **tourism signage** supports the region's visitors have a safe, engaging and easy transit around the region, and aligns to the Riverland Brand<br>• Undertake a region-wide tourism signage audit and prioritisation schedule.<br>• Actively pursue funding to implement improvements | **LG**, DR, SATC, Chambers of Commerce, Operators | Medium term |
| 2.9 | **Advocate for enhanced public transport links** that support the visitor to get to, and move around the Region | **LG**, RDAMR, DR | Medium Term |
| 2.10 | **Advocate for improved digital connectivity** and mobile coverage in the region | **LG**, RDAMR, Operators, Telstra | Medium Term |
| 2.11 | **Advocate for tourism sensitive policies** across the region in relevant Planning and Development frameworks | **LG**, DR, TiCSA SATC, RDAMR, Operators | Ongoing |
| 2.12 | **Advocate for extended opening hours** to support the Region's high yield visitors and peak visitation. | **DR**, LG, RDAMR | Ongoing |
| 2.13 | **Identify and apply for grants** to support the activation of Riverland Experience + Supply Development Projects | **All previous project Leads** | Ongoing |

# Priority Area 3: Governance + Collaboration

## The Mission

Ensure strong governance and clear strategic direction to enable all stakeholders to effectively collaborate on opportunities to grow the Region's visitor economy.

## What Action is Required

The region needs a collaborative industry, empowered by leadership from across industry, Local Government and private enterprise.

Fostering and participating in a supportive and positive industry will allow the stakeholders to better pool their resources and insights, reduce duplication of efforts, agree on shared priorities and leverage the opportunities for driving growth.

This new RTP2030 will provide a clear direction for the region's key visitor economy stakeholders in terms of the opportunities and priorities to grow the visitor economy for the next decade. The Plan will provide clarity on what resources are required to activate the opportunities, and where those resources are best placed for effective implementation.

The Region will need to formalise a process to galvanise the industry to focus on the broader, long term benefits that will be realised by working together.

## How will We Get There

| No. | STRATEGIES | STAKEHOLDERS<br>**Bold: to Lead,**<br>*Italics: key supporter*<br>Normal: to align/support | PRIORITY |
|---|---|---|---|
| **3.1** | **Confirm the RTP2030 Governance Model to support implementation of the Plan,** all stakeholders to review investment in the visitor economy to support the implementation of the new Riverland Tourism Plan 2030 (RTP2030). Confirm stakeholder lead and funding sources for:<br>• Visitor Servicing<br>• Events<br>• Destination Marketing<br>• Industry Development + Advocacy | **DR, LG,** RDAMR | Immediate |

| No. | STRATEGIES | STAKEHOLDERS **Bold: to Lead,** *Italics: key supporter* Normal: to align/support | PRIORI-TY |
|---|---|---|---|
| **3.2** | **Develop set of valid measurement metrics via a digital visitor data dashboard to reliably track the trajectory of the Region's visitor economy.**<br>• Visitation<br>• Dispersal<br>• Visitor Sentiment<br>• Consumer Spending | **DR,** SATC, Operators | Medium term |
| **3.3** | **Establish MOUs with stakeholders** with regard to their role and remit in implementing RTP2030, including a consistent communication and reporting framework. | **DR, LG** | Immediate |
| **3.4** | **Advocate for increased diversity** in Riverland visitor economy governing bodies + tourism and event committees particularly in areas of young tourism professionals. | **DR, LG** | Ongoing |
| **3.5** | **Engage visitor economy groups and committees in the RTP2030** and communicate regularly and in a coordinated way to share information and report on achievements | **DR, LG** | Immediate |
| **3.6** | **Report on the achievements** of the actions within the new RTP2030 annually to relevant stakeholders, including Industry and Elected Members | **DR, LG** | Ongoing |
| **3.7** | **Review the RTP2030 at regular intervals (every 3 years),** adjust priorities and reset actions if required. | **DR, LG** | Long Term |
| **3.8** | Ensure consistency in priorities between the **RTP2030 and the SA Regional Visitor Strategy** | **DR** | Short Term |
| **3.9** | **Develop a quarterly Industry Survey to gather business sentiment insights**<br>Survey to include insights relating to business activity (eg occupancy), owner/manager sentiment (present and future confidence)<br>• Analyse and publish results<br>• Use the results to inform conversations regarding industry investment initiatives<br>• •Potential data sources to integrate > HHA, DEW, TiCSA | **DR,** LG, Operators | Short Term |
| **3.10** | **Review, enhance and promote the Riverland Ambassadors Programme** | **DR,** LG Visitor Servicing, LG, RDAMR, RW, Event Organisers, Operators, Community | Short Term |
| **3.11** | Maintain and enhance the implementation of an **Industry Communication Plan**<br>• Maintain an updated database of all industry stakeholders<br>• Share relevant and timely information (eg insights/training/grants) via enewsletters for tourism operators/businesses and other industry stakeholders<br>• Management of an Industry Facebook Group<br>• Provide regular opportunities for industry to stay connected via networking events | **DR,** LG, RDAMR, RW, SATC | Ongoing |
| **3.12** | Review, enhance and promote the **Riverland Tourism Exchange Programme** | **DR**, Operators, LG, RW | Short Term |

| No. | STRATEGIES | STAKEHOLDERS **Bold: to Lead,** *Italics: key supporter* Normal: to align/support | PRIORI-TY |
|---|---|---|---|
| **3.13** | **Facilitate and encourage tourism operators to collaborate with other operators and industry organisations on mutually beneficial initiatives** that support the attraction of the region's high yielding visitor personas and niche interest segments and markets<br>• Experience development<br>• Product packaging<br>• Buy in projects and Marketing campaigns | **DR,** RW, SATC | Short Term |
| **3.14** | **Liaise with and work collaboratively on relevant projects with other sectors of the Riverland's economy,** including Real Estate, Agriculture, and Viticulture. | **DR, RDAMR, RW** | Ongoing |
| **3.15** | **Work with neighbouring regions to maximise tourism opportunities** across visitor servicing, marketing, experience packaging and other consistencies | **DR, LG** | Medium Term |

# Priority Area 4: Industry Capability

## The Mission

Supporting Riverland Tourism Operators to develop sustainable businesses that deliver high quality visitor experiences for the Riverland's high yielding visitor personas.

## What Action is Required

The experience a visitor has within a destination is one of the most influential marketing activities in attracting new and repeat visitors to a destination. This is because a visitor's positive experience fuels the highly trusted positive advocacy for a destination through visitors and residents both online and offline.

To grow visitor advocacy, and thus the economy, it is critical the businesses delivering or facilitating the product or service on the front-line have the skills, staff and support to develop sustainable and high-quality experiences.

Given the region's tourism industry mostly comprises of small and medium sized businesses, this underpins the success of the whole plan, and should remain a major priority for the Region.

## How will We Get There

| No. | STRATEGIES | STAKEHOLDERS **Bold: to Lead,** *Italics: key supporter* Normal: to align/support | PRIORITY |
|---|---|---|---|
| **4.1** | **Ensure businesses and volunteers have access to, and engage with, tools, technologies, programs and funding to maximise their professionalism and profitability** <br>• Prioritise industry uptake of ATDW listings <br>• Connection to grants and businesses assistance <br>• Undertake a skills and training gap audit <br>• Develop/leverage/advocate for a schedule of relevant professional development opportunities for visitor economy businesses (specifically, around Business Continuity, Storytelling, Digital Marketing, Online Bookings, Commissionable Products), Customer Service, Experience Development/Design (specifically accessible design), and Event Management (Marketing, Risk Management, etc). <br>• Identify and promote programs that support businesses to expand their product distribution and enter new markets (trade/online) | **DR,** LG, RW, TICSA, RDAMR, SATC, HHA | Ongoing |

| No. | STRATEGIES | STAKEHOLDERS Bold: to Lead, *Italics: key supporter* Normal: to align/support | PRIORITY |
|---|---|---|---|
| 4.2 | **Develop and/or identify systems to connect businesses to potential employees** to fill gaps in labour supply to support the continuity and sustainability of jobs and businesses in the Region. | **RDAMR, DR, LG, RW, PIRSA** | Medium Term |
| 4.3 | **Advocate for the growth of the tourism industry workforce** through initiatives that provide training / work experience placement /vocational placements for secondary schools and college students and apprentices and industry-led promotions of the sector. | DR, TiCSA, Riverland Chambers of Commerce, RW, RDAMR, Operators, Universities, Schools, TAFE other training organisations | Long Term |
| 4.4 | **Develop a volunteer strategy** to support the sustainable development and succession planning of event committees, tour guiding and visitor servicing | **DR, LG** | Medium Term |

# Priority Area 5:
# Leisure and Business Events

## The Mission

Ensure a Team Riverland (all stakeholders) are collaborating and to attract and deliver events that drive demand for the Region year round.

## What Action is Required

Events are important economic and community development drivers in the Riverland. They drive demand for visitation to the Region in many diverse interest areas, even-out seasonality, encourage intra-regional dispersal, improve liveability and even attract new residents to the Region.

The Riverland has an active calendar of both major events and community events. Opportunities exist to better promote these events to identified high yield visitors, and provide ticketing and booking support where required via Priority Area 1 Marketing + Visitor Servicing. However the Region's ability to sustain and grow existing leisure events has challenges around resourcing, scheduling and funding that need to be addressed for these events to continue to drive demand.

The Region's recreational and sporting facilities, active sporting clubs and sporting culture, strong group accommodation inventory, its year around sunny climate and growth in wellness travel means growing sports events to the Region is a major opportunity.

The Region is also well placed to attract and host more smaller group MICE events and weddings in its function venues, group dining venues, Murray River foreshore precincts and established group accommodation providers.

However parochialism between Riverland towns is a key challenge that needs to be put aside to fully realise the event opportunity for the Region.

Therefore the biggest opportunity for the Region to grow leisure, sports and business events will be the development of a collaborative Events Strategy, which has a dedicated resource who can bring the region together to realise the full potential of this segment of the visitor economy.

# How will We Get There

| No. | STRATEGIES | STAKEHOLDERS<br>**Bold: to Lead,**<br>*Italics: key supporter*<br>Normal: to align/support | PRIORI-TY |
|-----|-----------|------------------------------------------------------------------|-----------|
| **5.1** | **Develop, resource and fund the implementation of a Riverland Event strategy** to help event stakeholders better collaborate and drive demand for the Region in for its high yield visitor personas and niche interest segments<br>• Events audit (current/proposed events post COVID-19, customer needs, pre/post touring opportunities, event stakeholders/committees, funding opportunities, volunteer capacity and skills, venue audit/gap analysis)<br>• Identify funding, development, marketing and visitor servicing strategies relating to leisure events (profile and journey map event organisers and participants, develop marketing strategies) to grow existing and attract new events into the region.<br>• Review, enhance and promote Riverland Event calendar, and listing of events on ATDW.<br>• Promotion of Riverland events through all the Region's Destination Marketing + Visitor Servicing activities.<br>• Development of product packaging where relevant<br>• Increase inclusion of Riverland based events in major SA Events, such as Tasting Australia, Fringe, History Week, SALA.<br>• Development of a consistent funding approach for LGs (Application process, funding guidelines, considerations etc)<br>• Development of an Education and Data Measurement Strategy for all Regional Events (Education program to ensure volunteers can obtain the skills/knowledge to run events successfully, and a mandated measurement strategy for all events to track ROI as a region)<br>• Succession planning for events (conceptual volunteer fatigue, ongoing funding) | **LG/DR (TBC),** LG Event Organisers inc RW | Short term |
| **5.2** | Develop collaborative partnership with sporting stakeholders, sports marketing bodies, Riverland sporting clubs and venue to identify, bid, and host **high yield sporting events** to the Region. | **DR**, LG, OSR, Sports Clubs, Operators, Sports Marketing agencies | Medium Term |
| **5.3** | Undertake partnership marketing with MICE suppliers, trade and industry associations to attract high yield **Business Events** to the Region | **DR,** ACB, Operators | Medium Term |
| **5.4** | Undertake collaborative marketing and partnership opportunities to attract high yield destination **Weddings** to the Region. | **DR,** Operators | Ongoing |
| **5.5** | Provide **relevant support to event organisers** such as booking concierge service, ticketing, pre-visit visitor collateral and pop up visitor servicing during events. | **LG (Visitor Services),** DR | Short Term |

# Priority Area 6: Promote the Value of Tourism

## The Mission

Proactively communicate the value of the visitor economy with the broader Riverland community to create positive sentiment for the sector and encourage local advocacy for the region as a travel destination.

## What Action is Required

The Riverland's visitor economy is already a significant economic driver for the Region, and has the potential to drive increased employment and business sustainability, if the actions within this plan are realised.

It's imperative that communities are supportive of the visitor economy, as positive community sentiment results in greater levels of trust which gives Local Government a higher degree of social licence to invest in visitor experiences and infrastructure.

When communities appreciate the value of tourism, and what it means for their families and their future livelihoods, it creates friendlier communities and thus better visitor experiences; and locals are more likely to become advocates who provide word of mouth recommendations to current visitors and encourage their own friends and relatives to visit.

Communicating regularly and consulting widely on projects for the visitor economy are key activations that will galvanise a community and is likely to assist in improved communication and collaboration across other sectors within the region.

# How will We Get There

| No. | STRATEGIES | STAKEHOLDERS<br>**Bold: to Lead,**<br>*Italics: key supporter*<br>Normal: to align/support | PRIORITY |
|---|---|---|---|
| **6.1** | **Share the value of the visitor economy within Local Government**<br>• Regular presentation of achievements of the RTP2030 to elected bodies<br>• Organise and facilitate familiarisations for elected members and council staff of visitor experiences | **DR**, LG | Ongoing |
| **6.2** | **Develop and implement a long-term local advocacy strategy** for the greater Riverland communities<br>• Publish regular editorial in Murray Pioneer with key achievements in the industry (promote the value of tourism, keep locals informed of what there is to see and do)<br>• Regional Shop/Experience Local Campaign (offering locals incentives to drive visitation from locals and VFR)<br>• Activate hashtag where locals can share their Riverland Stories on Instagram (stories can then be leveraged in visitor marketing activities)<br>• Develop an annual 'The True Value of Tourism' lift out for Councils to send to all residents with Rates | **DR**, LG | Short Term |
| **6.3** | **Consult and engage the Riverland community** in the future of tourism at a strategic level through destination management planning and activate local PR regarding the value these projects bring to the community | **LG**, DR | Ongoing |

# Key Performance Indicators

This Plan cannot be managed if it cannot be measured. As such, 6 Major Key Performance Indicators (KPIs) have been identified and will be used to monitor and measure the progress of this Plan and indicate the achievement of the 6 Strategic Priority Areas initiatives and actions.

In Priority Area 3: Governance and Collaboration, it has been recommended the Region develop a set of valid measurement metrics (in addition to the below) via a digital visitor data dashboard to reliably track the trajectory of the Region's visitor economy.

Additional data points include:

- Accommodation Occupancy
- Dispersal
- Visitor Sentiment
- Consumer Spending
- Visitors Serviced

| | METRIC | SPECIFIC METRIC | BASELINE | 2030 POTENTIAL |
|---|---|---|---|---|
| **ECONOMY** | Expenditure | Tourism Expenditure | $180M (Domestic) | $317M |
| | Jobs | Number of people directly and indirectly employed in tourism | 2,000[3] | 2,280[4] |
| **VISITORS** | Visits | Total number of overnight visits (Domestic + International) | 392,000 | 406,504[5] |
| | Nights | Total nights (Domestic + International) | 1,330,000 | 1,379,210[6] |
| | ALOS | Average length of stay (Domestic) | 3 | 4[7] |
| | Day Trips | Total number of Day Trip visitors | 402,000 | 550,074[8] |

[3] - South Australia Tourism Commission, Riverland, The Value of Tourism
[4] - Tourism employment is projected to grow nationally by an average rate of 1.4% per annum.
   http://www.tra.gov.au/documents/Tourism_Employment_Projections_FINAL_Oct13.pdf
[5] - 10-year annual average growth rates from 2019/2018 of 3.7% for domestic market only
   (https://www.tra.gov.au/ArticleDocuments/185/Tourism_Forecasts_2019.pdf.aspx)
[6] - See reference 8
[7] - Stretch target, no formula available.
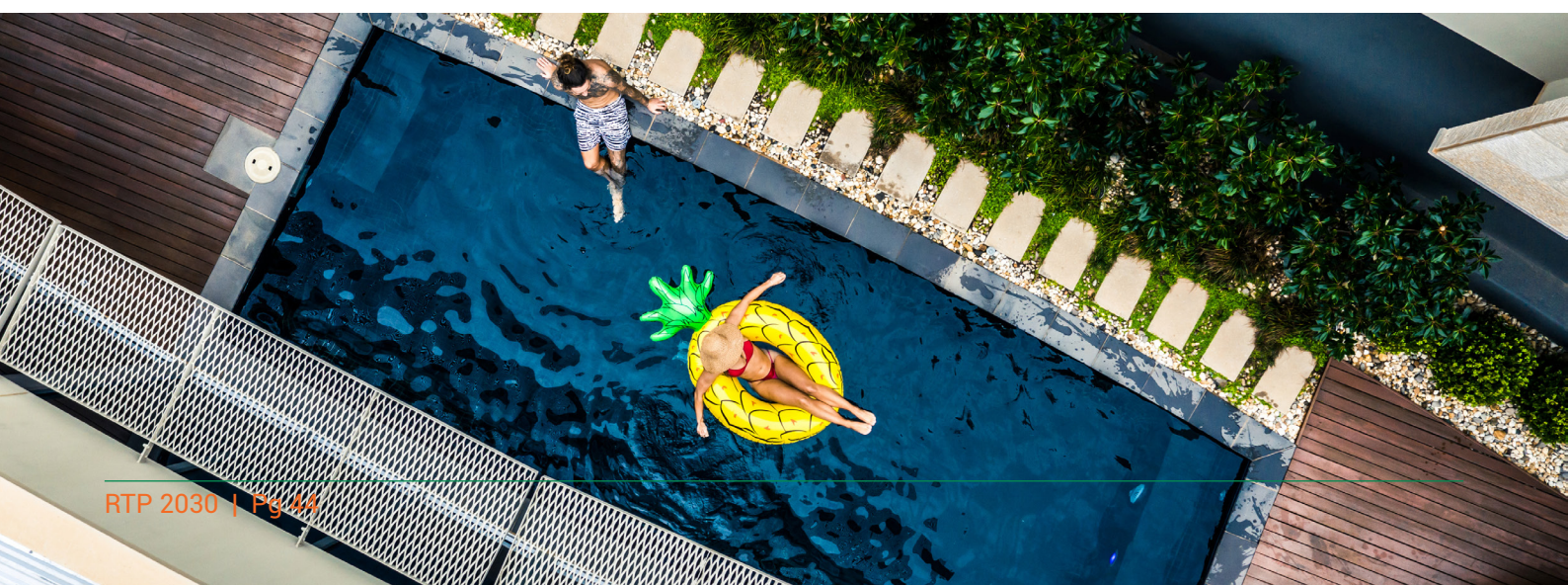[8] - See reference 8

# Measurement Evaluation Methodology

Below is a snapshot of the Evaluation Method for each of the KPIs for this Plan. However, it is recognised that economy KPI's will need updating once post covid-19 forecasts are updated. New measures may also need to be developed and for some aspects quantitative measures are not easily obtainable and alternative tools to review progress may need to be used. An annual review of this Plan is recommended with associated reporting to be made available to key stakeholders in the Plan.

| PERSPECTIVE | # | MAJOR KEY PERMORMANCE INDICATOR | DATA COLLECTION METHOD |
|---|---|---|---|
| **ECONOMY** | 1 | Tourism Expenditure | • Baseline data available from SATC Regional Tourism Profile 2016-2018 (updated data is available each year)<br>• 2030 Potential Set by SATC (2030 Tourism Strategy, and forecast data made available from Research Team, February 2020). |
|  | 2 | Direct and Indirect Employment | • Baseline data available from Tourism Research Australia Regional Satellite Account for Riverland Tourism Region 2017-2018<br>• 2030 potential data calculated using Tourism Employment Average growth rate of 1.4% per annum (http://www.tra.gov.au/documents/Tourism_Employment_Projections_FINAL_Oct13.pdf |
| **VISITORS** | 4 | Total number of overnight visits (Domestic + International) | • Baseline data available from SATC Regional Tourism Profile 2016-2018 (updated data is available each year)<br>• 2030 potential data calculated using 10-year annual average growth rates of 3.7% for domestic market (https://www.tra.gov.au/ArticleDocuments/185/Tourism_Forecasts_2019.pdf.aspx)<br>• Average Length of Stay is a stretch target. |
|  | 5 | Total nights (Domestic + International) |  |
|  | 6 | Average length of stay (Domestic) |  |
|  | 7 | Total number of Day Trip visitors |  |

# Acknowledgements

The Riverland Tourism Plan 2030 has been prepared through extensive consultation with key tourism stakeholders across community, industry, business and government. Stakeholder input to the Plan was gathered through the following sources during February – August 2020:

- Via 23 responses through online survey of residents, community groups, local government, industry and government staff (Feb – March 2020)

- Over 75 local government, tourism operators and other key stakeholders were involved in 7 face to face community consultation workshops in across the Region (February 2020)

- Many Individual meetings were also conducted with key government and industry stakeholder organisations (February-August 2020)

| Local & State Government | Industry | Local Community |
|---|---|---|
| • Elected Members, Executive Staff, Visitor Servicing Staff of<br> • Renmark Paringa Council<br> • Berri Barmera Council<br> • District Council of Loxton Waikerie<br> • Mid Murray Council<br>• South Australian Tourism Commission – Marketing, Product Development<br>• Department of Environment + Water<br>• Department of Primary Industries + Regions<br>• Regional Development Australia Murraylands and Riverland<br>• Destination Riverland Staff and Committee | • Mildura Rural City Council (Visitor Servicing Team)<br>• Murray River, Lakes and Coorong Regional Tourism Manager<br>• Houseboat Hirers Association | • 75+ Local Residents, Business Owners, Wineries, Tourism Providers in the Region |

# GLOSSARY

ABS — Australian Bureau of Statistics
ACB — Adelaide Convention Bureau
ACT — Australian Chamber of Tourism
AFG — Australian Federal Government
ATDW — Australian Tourism Data Warehouse
BBC — Berri Barmera Council
DCLW — District Council of Loxton Waikerie
DEW — Department of Environment + Water
DPTI — Department of Planning, Transport and Infrastructure
DR — Destination Riverland
HHA — Houseboat Hirers Association
HYVP — High Yield Visitor Persona
LG — Local Government (The 4 Councils in the Riverland)
MICE — Meetings Incentives Conventions Exhibitions
MMC — Mid Murray Council
PIRSA — Department of Primary Industries + Research
RDAMR — Regional Development Australia Murraylands and Riverland
RPC — Renmark Paringa Council
RTO — Regional Tourism Organisation
RW — Riverland Wine
SATC — South Australian Tourism Commission
TA — Tourism Australia
TiCSA — Tourism Industry Councils SA
TRA — Tourism Research Australia
VFR — Visiting Friends and Relatives
VIC — Visitor Information Centre (accredited)
VIO — Visitor Information Outlet

This Plan has been prepared by Tourism eSchool in conjunction with key stakeholders within the Riverland Region.

**Disclaimer**

The information contained in this report is intended only to inform and it is expected that all recommendations should be analysed, and appropriate due diligence undertaken prior to making any investment decisions.

In the course of our preparation of the document, recommendations have been made on the basis of assumptions, methodology and information provided by many sources through the consultation process (See Acknowledgements). Whilst every effort was made to report on the most accurate data and information available, Tourism eSchool accept no responsibility or liability for any changes in operation/regional circumstance, errors, omissions, or resultant consequences including any loss or damage arising from reliance on the information contained in this report.

**Images**

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