



Limestone Coast Tourism Region Destination Situation Analysis Version 1.2

As at July 2020

Prepared for
Limestone Coast Local Government Association

This Report has been prepared by Tourism eSchool between January and July 2020



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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.

Statement of Acknowledgement

Limestone Coast Local Government Association acknowledge the Limestone Coast is the traditional lands for the Boandik and Ngarrindjeri people and that we respect their spiritual relationship with their country.

We also acknowledge the Boandik and Ngarrindjeri people as the custodians of the Limestone Coast Region and that their cultural and heritage beliefs are still as important to the living Boandik and Ngarrindjeri people today.

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Glossary

ABS – Australian Bureau of Statistics
ACT – Australian Chamber of Tourism
AFG – Australian Federal Government
ATDW – Australian Tourism Data Warehouse
CMG - City of Mount Gambier
DCG - District Council of Grant
DCR - District Council of Robe
DEW - Department of Environment + Water
DPTEI – Department of Planning, Transport and Infrastructure
KDC - Kingston District Council
LCLGA – Limestone Coast Local Government Association
NLC - Naracoorte Lucindale Council
PIRSA - Department of Primary Industries + Research.
RDALC – Regional Development Australia Limestone Coast
RTO – Regional Tourism Organisation
SATC – South Australian Tourism Commission
TA – Tourism Australia
TDC - Tatiara District Council
TiCSA – Tourism Industry Councils SAC
TRA – Tourism Research Australia
VFR – Visiting Friends and Relatives
VIC – Visitor Information Centre (accredited)
VIO – Visitor Information Outlet

Introduction

As environmental, economic and social trends continue to impact on regional Australia, combined with the COVID-19 impact on the tourism industry, a sustainable visitor economy will continue to be an important economic and social driver for communities and businesses across the Limestone Coast Region (the Region).

The Limestone Coast is home to an established tourism industry of over 750 visitor experiences, with welcoming, visitor-focused town and communities offering accommodation, dining, retail, cultural and historical attractions and visitor information centres.

The hero experiences of the Region are centred around the natural landscapes of volcanoes, craters, lakes, caves, sinkholes, swamps, ancient coastline and forests. These include Naracoorte Caves (SA's only World Heritage Site), The Blue Lake, Umpherston Sinkhole, Piccaninnie Ponds and Ghost Mushroom Lane. Cave diving/snorkelling, fishing, coastal 4wding and birdwatching are niche interest activities driving visitation to the Region.

The Coonawarra is the Region's hero wine region, along with Padthaway, Cape Jaffa, Mt Benson and Mount Gambier offer a growing number of cellar door experiences, while there is a growing regional dining scene.

These hero experiences are underpinned by a thriving agricultural industry, a strong calendar of events and a cultural and historical melting pot which permeates each and every experience in the Region.

With such a diverse and exciting range of tourism experiences, the visitor economy is increasingly becoming one of the Region's economic beacons, contributing \$337million at the December 2018 quarter. Forecast data also indicates positive growth for the sector with potential to reach \$609million by September 2030.

Overnight visitation to the Region is also growing positively (from 461,000 in FY2010 to 617,000 FY2018), and currently attracts an average of 14% share of total overnight visitation to South Australian regions.

Forecast data available from Tourism Research Australia have 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 and length of stay for the Region.

Whilst the impact of COVID-19 is still fresh, and offering a blurred lens as to the impact on all global visitor economies, 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.

To capitalise on the great potential of the Region, the Limestone Coast Local Government Association (LCLGA) engaged Tourism eSchool, a tourism consultancy, to work with key stakeholders to collaboratively develop a Destination Tourism and Marketing Plan (The Plan) for the Region.

The first step in this process was to develop this '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. A Consultation Report is made available as an appendix to the Destination Situation Analysis.

Through the consultation phase, Tourism eSchool identified all the key internal and external stakeholders' roles and responsibilities, analysed and assessed the current research and strategic plans, 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.

From this analysis, major opportunities have been identified for effective and sustainable visitor economy growth which are to be considered in the development of the Destination Tourism and Marketing Plan 2025 (separate document).

1. The Visitor Economy

The concept of the visitor economy is increasingly being adopted by the global tourism industry. The visitor economy is broader than the traditional view of the 'tourism sector', which focuses on the leisure market of visitors that travel for a variety of reasons. The visitor economy includes all visitors that travel outside their usual home to take part in activities including leisure, business, events, employment, education or to visit friends and relatives.

These visitors, which include international, interstate, intrastate and day trip visitors, provide benefits to the economy through the direct contributions of their tourism activities, as well as the indirect contributions via the value chain, such as the impacts of capital investment and Government expenditure.

1.1 Why does a thriving visitor economy matter to the Limestone Coast?

The visitor economy has the potential to increase employment, investment, infrastructure development, exports, and provision of temporary labour in regional destinations.

A thriving visitor economy can also play an important role in enhancing a community's vibrancy, prosperity and liveability – all of which are important factors for the social fabric of the Limestone Coast region.

Opportunities for the Limestone Coast's youth would also benefit from a strong tourism industry, not only from a social perspective, but providing future training and career pathways, which would help to retain the population in the community, and sustainability of the Region.

Consultation with stakeholders in the Limestone Coast region highlighted the following reasons why the visitor economy is important to them:

- It ensures the sustainability of our local communities
- Opportunity to maintain or grow the population base
- Allows farmers to diversify their offering
- It offers another dimension to regional prosperity
- It helps the current population share the load of rates and taxes
- It enables people to confidently expand their business
- It allows our families to stay in the region

1.2 How is the Value of the Visitor Economy Measured?

When it comes to calculating the return on marketing investment of investment in the Visitor Economy, it can be challenging to determine a direct return on investment as there are often multiple stakeholders investing in projects and often results that are difficult to quantify.

However, as a guide for organisations investing in a Visitor Economy, the 2015 Productivity Commission Report¹ found that for every \$1 invested in a Visitor Economy, the return on investment was \$15, while Tourism Accommodation Australia² found the return as high as \$22 for every \$1 invested.

To accurately identify the growth of a destination's visitor economy, organisations collect data points from a variety of valid sources. In Australia, destinations typically use insights from the following data sources to paint a picture of the current state of their visitor economy:

- Tourism Research Australia's Domestic and International Visitor Surveys
- Australian Bureau of Statistics
- Primary Research insights (research projects specific to their state or region)

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

- Visitor Sentiment (via Primary Research Projects and Desktop Research)
- Visitor Spend Tracking (eg. Destination NSW work collaboratively with Westpac to develop a Destination NSW Westpac Tourism Expenditure Monitor, which effectively monitors how people spend money when they travel throughout NSW.³)

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 regions in which people live are three of biggest indicators for destinations to consider.

1.3 What a successful visitor economy looks like in the Limestone Coast

Consultation with stakeholders shared their ideas on what a successful tourism industry would look like to them. The sentiment shared included:

- Sustainable steady flow of visitors year-round
- More permanent employees throughout the year
- More leisure events in low seasons to drive visitation
- The Limestone Coast features in more trade and tour itineraries
- There are more business events driving increased visitors
- The region is known as a multi-night stay destination
- The region's stakeholders are collaborating and communicating effectively
- Full regional event calendar that's coordinated across the region
- More destination marketing activities for the whole region

¹ <https://www.pc.gov.au/research/completed/international-tourism>

² https://www.tourismaccommodation.com.au/wp-content/uploads/2012/08/RETURN-ON-MARKETING-INVESTMENT-FOR-AUSTRALIAN-TOURISM-vrp2-16_7_14.pdf

³ Destination NSW Westpac Tourism Expenditure Monitor > <https://www.destinationnsw.com.au/tourism/facts-and-figures/state-tourism-statistics/tourism-expenditure-monitor>

- Increased number of visitors
- Lots of great reviews for the businesses in the region and strong word of mouth for the region.
- Better linkages between experiences to keep visitors in the Region longer
- Mature and developed Touring Sector
- Locals are advocating freely for the region
- There are more online bookable and commissionable experiences
- Region is aesthetically pleasing to the eye, shops are booming and main streets are vibrant

2. Setting the Scene

2.1 The Global Visitor Economy

Leading into 2020, the United Nations World Tourism Organisation (UNWTO) reported a total of 1.5 billion international tourist arrivals recorded in 2019 globally (a 4% increase on the previous year, which is also forecast for 2020), confirming tourism as a leading and resilient economic sector.⁴

However, these positive growth forecasts were compromised when, on 31 December 2019, the World Health Organisation (WHO) was alerted to a pneumonia of unknown causes detected in Wuhan, China. The outbreak, subsequently named Coronavirus COVID-19, spread quickly globally and was declared a Public Health Emergency of International Concern on 30 January 2020 and a Pandemic on 11 March 2020.

In order to contain the outbreak in Australia, physical distancing restrictions set out by the Commonwealth and State Governments were implemented, which significantly changed the way people live and work in Australia. These types of restrictions are envisaged to have major economic impacts across the world, and in Australia (with GDP figures from the Bureau of Statistics showing Australia's economy shrank 0.3 per cent in the March quarter, amid bushfires and the early stages of the coronavirus pandemic⁵).

The crisis will have a lasting effect on the lives of the people who are living through it. It will likely become a defining element of the current generation, similar to the Great Depression or World War II for earlier generations.

In terms of the impact for the global visitor economy, key insights from the UNWTO “The impact of COVID-19 on international tourism, January-March 2020”⁶ report highlighted:

- The world is facing an unprecedented global health, social and economic emergency with the COVID-19 pandemic.
- Travel and tourism are among the most affected sectors with airplanes on the ground, hotels closed, and travel restrictions put in place in virtually all countries around the world.
- In an unprecedented blow to the tourism sector, the COVID-19 pandemic has cut international tourist arrivals in the first quarter of 2020 to a fraction of what they were a year ago.
- Available data points to a double-digit decrease of 22% in Q1 2020, with arrivals in March down by 57%. This translates into a loss of 67 million international arrivals and about USD 80 billion in receipts.

The UNWTO also released scenario data in May 2020 that showed the potential number of international tourist arrivals in 2020, based on when border restrictions re-open (Figure 1).⁷

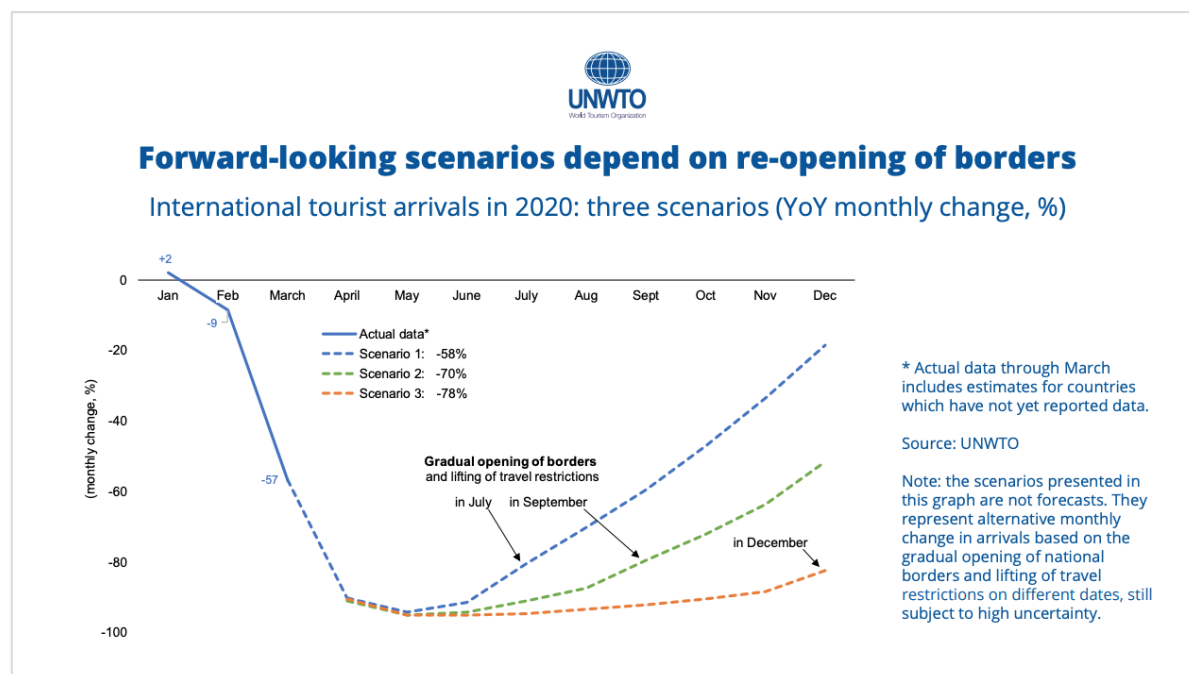
⁴ UNWTO Article > International tourism growth continues to outpace the global economy > <https://www.unwto.org/international-tourism-growth-continues-to-outpace-the-economy>

⁵ Australian Bureau of Statistics – March 2020 Quarter > <https://www.abs.gov.au/ausstats/abs@.nsf/mf/5206.0>

⁶ UNWTO “The Impact of COVID-19 on international tourism, Jan-Mar 2020” > <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer%20-%20May%202020%20-%20Short.pdf>

⁷ UNWTO “The Impact of COVID-19 on international tourism, Jan-Mar 2020” > <https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-05/Barometer%20-%20May%202020%20-%20Short.pdf>

Figure 1 - UNWTO International tourist arrivals in 2020: Three Scenarios



The UNWTO has recently released a report highlighting recommendations to support governments, the private sector and the international community in navigating the unparalleled social and economic emergency that is COVID-19⁸. The key recommendations include:

- Managing the Crisis and Mitigating the Impact
- Providing Stimulus and Accelerating Recovery
- Preparing for Tomorrow

Read the full Report online > https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-04/COVID-19_Recommendations_English_1.pdf

2.1.1 Global Travel Insights

Prior to the unprecedented impact that COVID-19 continues to impress on the global tourism industry, industry experts^{9,10} identified the following travel trends. Whilst new trends will emerge post COVID-19, these trends will still be important considerations for destinations.

Experiences are at the heart of why people travel

Visitor travel for authentic experiences and when they have a positive experience, there is a high chance they will spread the word and advocate for a tourism product or region who delivers on their promise both on and

⁸ Supporting Jobs and Communities through Travel and Tourism > https://webunwto.s3.eu-west-1.amazonaws.com/s3fs-public/2020-04/COVID-19_Recommendations_English_1.pdf

⁹ 9 Travel Trends to Drive Tourism in 2018 > <https://www.trekksoft.com/en/blog/9-travel-trends-that-will-drive-the-tourism-industry-in-2018>

¹⁰ Travel + Tourism: Global Economic Impact + Issues 2017 > <https://www.wttc.org/-/media/files/reports/economic-impact-research/2017-documents/global-economic-impact-and-issues-2017.pdf>

offline. Therefore, maintaining a high level of visitor experience in a destination (across both local government and private tourism experiences) is a key consideration when looking to grow their visitor economy.

Some of the top experiences beyond 2019 will be:

- A request for unique experiences - Tour operators are now receiving requests for unique experiences from travellers who want to do something that is a once-in-a-lifetime. This is becoming more common amongst Millennials who want to explore the world and share their stories with others.
- Ecological tours are in demand - Ecological tours are the most popular tours offered by many tour & activity operators who responded to 2018 TrekkSoft Tourism Survey. These are usually rare experiences that educate and share inside information on the area, and how to protect it for the future. Tours that use proceeds to fund ecological projects such as forest or animal habitat restoration are chosen above alternatives without a cause.
- More Adventure - Adrenaline pumping activities continue to grow with two new generations who are keen to push their limits. Adventure destinations such as Area 47 in Austria, Queenstown New Zealand, and Interlaken Switzerland are booked for the variety of action-packed activities on offer.
- Multi-day Tours and Activities - There is a shift with multi-day tours and activities being booked further in advance and being a preferred option for travellers. Convenience is a key selling point as travellers no longer need to spend time planning various activities.
- Local Experiences - Travellers are choosing to become more immersed in the local culture when visiting a destination. They want to do what the locals do and eat where locals eat. Airbnb Experiences are offering a solution where travellers can book a local experience with destination experts.
- History + Culture - Walking tours are still one of the leading experiences for anyone visiting a new location. They are a great opportunity to find your bearing, meet other travellers and have all their questions answered by a destination expert.

Mobile bookings will be the new default

The majority of travellers have smartphones (there is a 102% mobile penetration rate in the Asia Pacific Region¹¹), and consumers are increasingly comfortable planning and booking experiences via their mobile devices. Therefore, any marketing and visitor servicing undertaken by destinations must have a strong focus on mobile and in particular mobile responsive websites.

Online reviews are the most trusted form of advertising for a destination

What visitors say about a tourism experience to their family and friends via online reviews or via word of mouth are the #1 and #2 most trusted forms of advertising¹². Therefore, any destination marketing needs to focus on ensuring their region's visitor experience is high, which will then encourage positive advocacy of their destination by visitors and locals. All other investments in marketing should also be considered in this context, with a reduction in investment in less trusted advertising, and increase in investment in experience development and capacity building with individuals to deliver the on-ground visitor experience in a region and exceed expectations.

Sustainability is about more than protecting the environment; it's about the local communities.

¹¹ Hootsuite Digital in 2018, Essential Insights into Internet, Social Media, Mobile and eCommerce use around the world. > <https://hootsuite.com/pages/digital-in-2018>

¹² 2015 Nielsons Trust in Advertising Report – Australia > <http://www.nielsen.com/au/en/insights/news/2015/its-a-trust-thing.html>

As people become more aware of issues of over-tourism in locations around the world (such as New Zealand, Venice, Iceland and Barcelona), they will look to travel to more out of the way tourism destinations that satisfy their travel aspirations. Tourism destinations need to ensure they focus on ensuring the sustainability of their local communities and landscapes (which is the reason people travel in the first place), and focus attracting more of the right visitors. Not profitless volume visitors, but those who stay the longest, spend the most and advocate for what the Region offers.

2.1.2 The Future Global Traveller

During the COVID-19 crisis, several global tourism and travel commentators are forecasting changes in travel behaviour, surmising that people will be looking for more mindful travel experiences – reconnecting with those who are most important, and in destinations that mean something to them.

Whilst people will be very keen to get out and travel again, they will initially be limited to, and possibly choose to travel close to home initially, prior to venturing interstate, and until international trips are even back on the cards.

Some additional key concepts around the changes in travel behaviour¹³ include:

- **People will explore closer to home** - Expect more people touring around their home countries, supporting local economies and exploring their own cities.
- **Surge in Armchair Travel** - Live-streaming performances, video conferencing meetings and virtual excursions have become universally accepted as a new norm since COVID-19. In the travel industry, some impressive examples have already manifested and will only continue into a post-pandemic planet.
- **Mindful Travel** - An aversion to mass tourism and cookie-cutter travel experiences will compel the industry to move towards more sustainable, compassionate and mindful operating systems. Fewer people will seek out clichéd holiday photos against a well-worn tourist attraction backdrop with more consideration given to how both one's presence and pennies impact the local community and environment, only opting for those experiences that promote the health and well-being of people and planet.
- **Change in values to support local, book direct.** COVID-19 saw communities localise, and with that sentiment to protect and support locals came to the forefront. People will continue to have this mindset, looking for experiences that highlight the local connection between place, people and products.
- **Widespread digital adoption.** Particularly in demographic cohorts who were not so digitally savvy prior COVID-19. It is predicted that this adoption will be maintained into the future¹⁴.
- **Strong Climate and Environment Focus.** The COVID-19 pandemic has heightened the awareness and care for the global environment, and people now prioritise and support businesses and experiences that have initiatives in place that have a sustainable focus for the environment.

¹³ Why coronavirus will change tourism forever: 4 post-pandemic travel trends to watch out for > <https://www.scmp.com/magazines/style/news-trends/article/3084225/why-coronavirus-will-change-tourism-forever-4-post>

¹⁴ <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-covid-19-recovery-will-be-digital-a-plan-for-the-first-90-days>

2.2 The Australian Visitor Economy

2.2.1 Tourism 2020 Strategy

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 cities, 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.¹⁵

Tourism Australia (TA) is committed to an ambitious 2020 target of increasing the value of the visitor economy to the nation from \$70billion to \$115-140billion, driven by growth in inbound travel (particularly from Asia) and supported by continued growth in the domestic market.¹⁶

TA are on track to achieve their goal of more than A\$115 billion in overnight spend by 2020. In the year ending December 2018, overnight tourism spend increased 8.1% to reach \$116.6 billion, exceeding the lower bound target of \$115 billion by 2020.

This progress is underpinned by:

- Domestic overnight spend – up 13% to \$72.7 billion and above the lower bound target of \$62.9 billion by 2020. Requires growth of 2.7% per annum to reach the upper bound target of \$76.6 billion
- International spend – up 7.4% to \$43.9 billion. Requires growth of 20% per annum to reach the upper bound target of \$63.4 billion.

As domestic tourism continues to rise, likely driven by a strong economy and lower exchange rates, international spend will need to increase if the upper bound targets are to remain within reach.¹⁷

2.2.2 Tourism 2030 Strategy

Austrade, in conjunction with Tourism Australia, is currently developing Australia's next national long-term tourism strategy. Development is occurring in cooperation with state and territory governments and the tourism industry. While Government has not formally announced a name for the new strategy, for ease of reference development work is being carried out under the heading of Tourism 2030.

Austrade, in cooperation with state and territory tourism organisations around Australia, held a series of workshops in September-November 2019 with key industry participants in each state and territory to help identify key priorities for the Tourism 2030 strategy.

It is anticipated that the new Tourism 2030 Strategy will commence in January 2021 (dates may change dependent on the impact of COVID-19).

¹⁵ Deloitte, Positioning for Prosperity? Catching the next wave. Building the Lucky Country #3, 2014, p3

¹⁶ Tourism 2020 Overview > http://www.tourism.australia.com/documents/Tourism_2020_overview.pdf

¹⁷ Tourism Research Australia, Tracking Tourism 2020 > <https://www.tra.gov.au/Economic-analysis/Tracking-Tourism-2020/tracking-tourism-2020>

2.2.3 COVID-19 and the Australian Visitor Economy

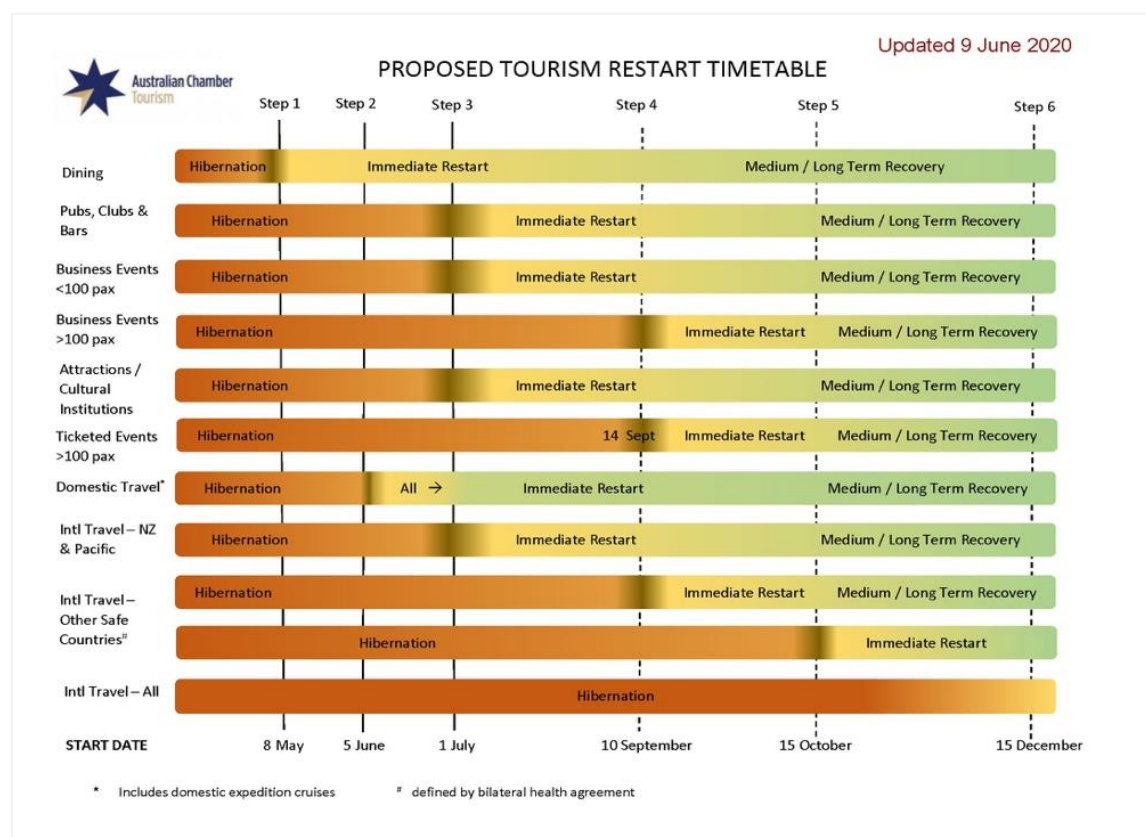
In response to the global pandemic, the Australian Federal Government (AFG) began implementing nation-wide social distancing measures from Friday 20th March 2020¹⁸ to reduce the potential risk of a major health crisis in Australia.

From 8th May 2020, the AFG announced a national three step plan¹⁹ to relax coronavirus restrictions, with states and territories to decide when each step will be implemented locally.

A Tourism Restart Taskforce has been established by the Australian Chamber of Commerce and Industry and will provide advice to industry and Government on the short, medium and long-term priorities to rebuild tourism in Australia. Tourism has hit harder than any other industry by the current COVID-19 crisis, and with the health concerns having been largely managed, a Tourism Restart Plan²⁰ has been developed and will be overseen by the Taskforce.

Part of the Tourism Restart Plan was a 'restart' timetable (Figure 2), as a guide to the gradual lifting of restrictions which were imposed on organisations within the tourism industry in late March 2020, which falls in line with AFG's three step plan.

Figure 2 - Australian Chamber Tourism - Proposed Tourism Restart Timetable, updated 9 June 2020



Data Source: Australian Chamber of Tourism, June 2020

Longer term impact of COVID-19 on the tourism industry are not currently available, however the AFG have reported an increase in unemployment to 7.1% in June 2020 (from 5.1% in Dec 2019).²¹

¹⁸ Australian Government – Key Coronavirus Updates by date > <https://www.australia.gov.au/coronavirus-updates>

¹⁹ Australian Federal Government – Roadmap to COVIDSafe Australia > <https://www.pm.gov.au/sites/default/files/files/covid-safe-australia-roadmap.pdf>

²⁰ ACT Tourism Restart Plan > <https://australianchambercovid.com/tourism-restart-taskforce/>

²¹ Trading Economics, Unemployment Rate as at April 2020 > <https://tradingeconomics.com/australia/unemployment-rate>

In addition to the global travel trends (noted in section 1.2.2), recent Australian research indicates that hygiene, general visitor safety and cleanliness will be front and centre for all destinations and precincts as we move into a reset and recover phase in the next six months (from May 2020).

Spending time with family and friends will increase in importance and visiting them will be a key motivator for travel. The great outdoors are likely to boom as travellers shift their preferences and avoid crowded places and the benefits of the outdoors on mental health are realised.²²

For regional Australia, the domestic drive market will likely be invigorated and represent the cornerstone of the industry initially, as an affordable and easy way for city dwellers to escape, and as a preferred mode of travel to minimise contact with others. The caravan and camping market will likely receive the bulk of the demand too, which will aid in the social distancing too. Also, given the economic impact on individual's discretionary income, it's likely that drive tourism will be the affordable alternative to long-distance, or even, international travel.

These trends are supported by a recent study from the University of Queensland that reveals that more than half of Australians are keen to travel domestically after COVID-19 restrictions are eased with 50% of the travellers would prefer to drive rather than fly to destinations.²³

²² Driving Success from Surviving to Thriving: Drive Tourism and COVID-19 Recovery

²³ Driving Success from Surviving to Thriving: Drive Tourism and COVID-19 Recovery

2.3 The South Australian Visitor Economy

In 2020, the Premier for South Australia launched the State Government's Economic Strategy for South Australia, which highlights a very ambitious goal to see a \$1billion lift in the state's economy, which is equates to 3% annual economic growth. To achieve this growth, a range of the state's industries will need to grow very significantly beyond their current trajectory. Initially, nine priority sectors have been identified as focus areas, with the visitor economy being one of them, because of their strong potential to meet increasing interstate and global demand, attract investors and leverage comparative advantages.²⁴

In 2017-18 South Australia saw people directly employed in tourism rise by 4% to 38,900. This is the highest ever recorded number of people directly employed by tourism in the state and placed the state well on the way to achieving the 2020 target of 41,000 jobs.²⁵

With regard to visitation, the state has experienced the following growth (September 2019 quarter)²⁶:

- Visits to South Australia grew 18% to a record high \$8.4million
- Nights in South Australia reached 38 million, which is an increase by 14%
- International expenditure has slightly fallen 2% to \$1.12billion
- Interstate expenditure rose 19% to a record high \$2.6billion
- Intrastate expenditure in South Australia also rose, up 25% to a record high \$2.4billion
- Interstate visitation grew strongly, up 16% reaching a record high of 2.9 million
- Intrastate Visitation had strong growth (21%) to 4.9million; and

In August 2019, the SATC launched the South Australian Visitor Economy Sector Plan 2030. This plan sets a bold ambition to grow our visitor economy to \$12.8 billion by 2030 and generate an additional 16,000 jobs.²⁷

The 2030 Tourism Plan suggests that while the Visitor Economy for South Australia in 2030 may look vastly different to today, much of the core proposition for travel will likely remain the same. Core drawcards for South Australia are likely to remain the state's established strengths across key areas such as food and wine, nature-based tourism and cultural experiences.

In May 2018, the South Australian Regional Visitor Strategy was launched highlighting key strengths, future potential priority areas for each of the State's tourism regions, which are all focused on achieving the state's 2020 target.²⁸ The implementation will be led by the Regional Visitor Strategy Steering Committee and has the potential to grow the state's regional visitor expenditure from \$2.6 billion to \$3.55 billion by 2020.

As at September 2019, the SATC reported that the Regional tourism 44% of the State's total visitor expenditure was spent in Regional SA, equating to \$3.45billion in expenditure, therefore already achieving over 97% of the RVS goal of \$3.55billion by 2020. The Second Progress Report (October 2019) for the Regional Visitor Strategy also highlighted that a number of the projects identified within the Strategy are in progress and well on the way to completion. The Regional Visitor Strategy will be revised and reset in 2020-2021.²⁹

2.3.1 The Impact of COVID-19 on the South Australian Visitor Economy

²⁴ SA Government Growth Plan > <https://www.growthstate.sa.gov.au/plan>

²⁵ SA State Tourism Satellite Account 2017-2018 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={12A00D1D-ABB7-4CF4-A06C-F5850DEFDA3}&B=False>

²⁶ SATC Value of Tourism as at September 2019 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={A74C94AF-E5CE-4DD0-979A-B5EB977BFF14}&B=False>

²⁷ SATC Tourism Plan 2030 > <https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>

²⁸ SA Regional Visitor Strategy - <http://tourism.sa.gov.au/research-and-statistics/strategies/south-australian-regional-visitor-strategy>

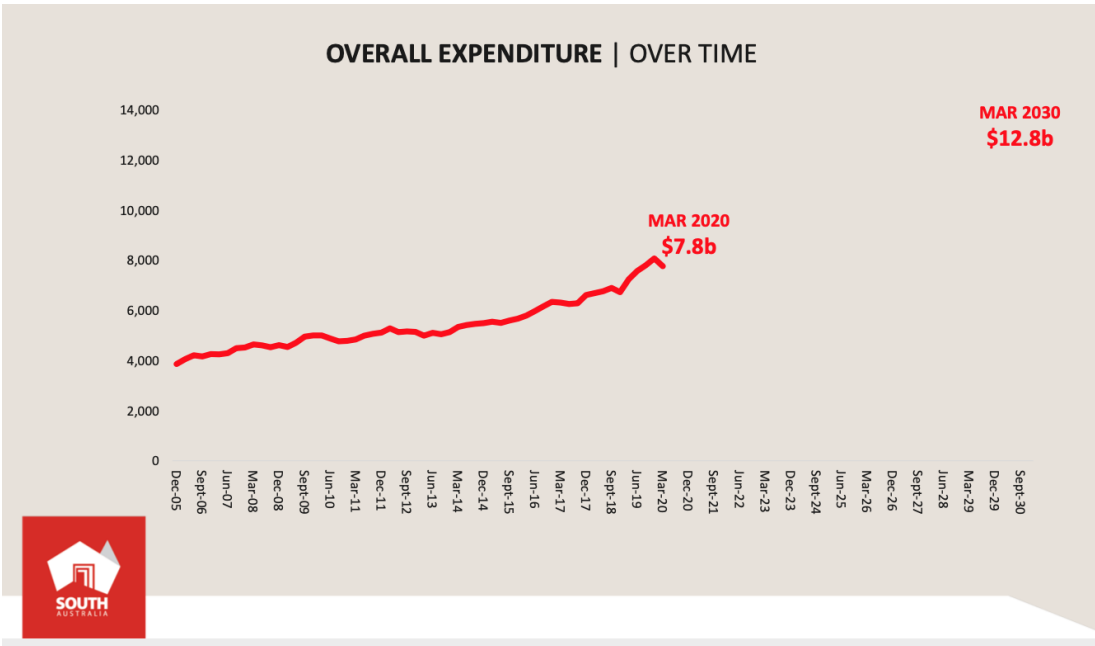
²⁹ Update given by SATC Destination Development team as at May 2020.

The impact of COVID-19 on the state’s visitor economy was widespread and brutal. Tourism operators took in about 630,000 fewer visitors in April 2020 compared to the same month in 2019³⁰. When the heavy restrictions started to lift in May and June, overnight visitor numbers recovered albeit at a 40% decline on the previous year.

From July onwards, the regional tourism sector in South Australia has anecdotally seen increased demand from visitors (and in some cases more demand than usual), which has carried right through to October. With border restrictions still in place for New South Wales and Victoria in September, the majority of visitors are domestic intrastate.

The SATC has recently presented new visitor insights since the beginning of the pandemic³¹, highlighting a slight drop in overall visitor expenditure in March 2020 (Figure 3). However, data has revealed that expenditure from day trips has grown (in March 2020, Figure 4) and demand for intrastate and day trips are positively trending (Figure 5).

Figure 3 - South Australia Visitor Economy, Overall Expenditure, March 2020

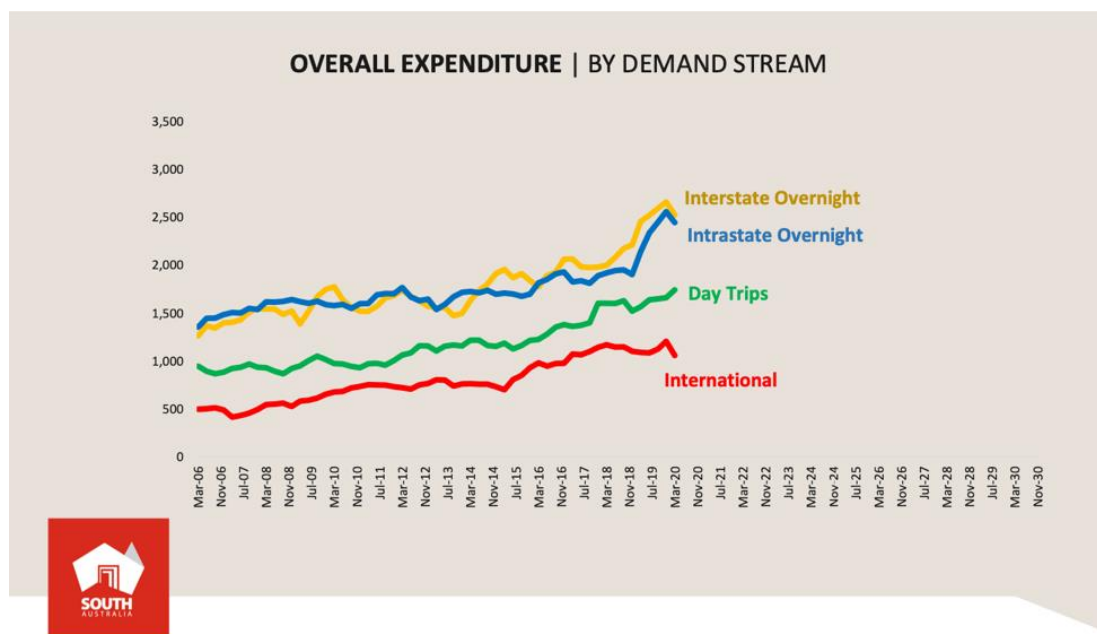


Data Source: The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020

Figure 4 - South Australia Visitor Economy, Overall Expenditure by demand stream, March 2020

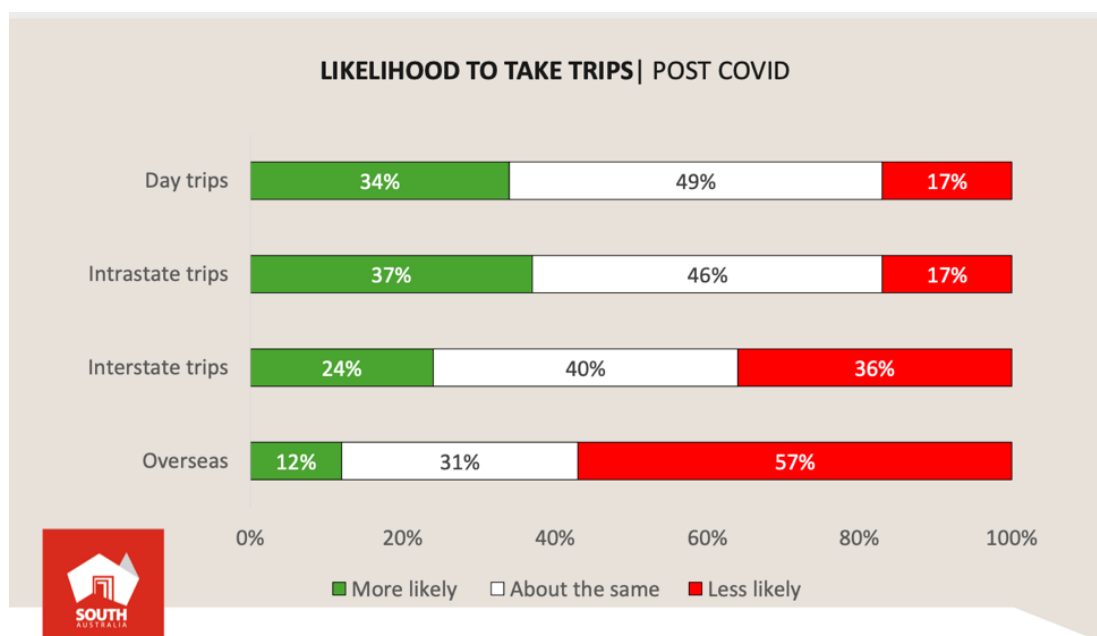
³⁰ Tourism Research Australia's National Visitor Survey - date

³¹ The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020



Data Source: The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020

Figure 5 - South Australia Visitor Economy, Likelihood to take trips, March 2020



Data Source: The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020

As at late July 2020, restrictions still in place in South Australia include closed interstate borders with Victoria and New South Wales, along with international borders (14-day quarantine still required for all incoming visitors), and large group gatherings for leisure and business events. These restrictions are set to gradually ease over the coming months, dependent on the proliferation of the virus in other Australian states, to what base level, however, is not yet determined.

3. Limestone Coast Visitor Economy Insights

Visitation data for the Limestone Coast tourism region is available through Tourism Research Australia's (TRA) Satellite Accounts, National Visitor Survey (NVS), and the International Visitor Survey (IVS).

The TRA and the South Australian Tourism Commission (SATC) have curated visitor data and insights for the Region in their respective Tourism Profiles (TRA 2015, SATC 2016-2018, accessed in February 2020) which have also both been used throughout this analysis to get a comprehensive understanding of the economic contribution of tourism to the Region's economy.

IMPORTANT NOTE: The data collected does not take into consideration the impact of COVID-19. Forecasts and new modelling for the industry post-COVID19 is not currently available (June 2020).

Key Findings

The Region's visitor economy is increasingly becoming one of its major economic beacons, contributing \$337million at the December 2018 quarter, which has been trending positively for the past 10 years. Forecast data also indicates significant growth potential for the region to reach \$609million by September 2030.

In 2017-2018, the Region's visitor economy supported 3,000 jobs (2064 full and part time jobs, and 951 Indirect full and part time jobs) which is 6.2% of total regional employment, another economic indicator which is seeing slow, but steady positive growth.

Overnight visitation to the Region is also steadily growing (from 461,000 in FY2010 to 617,000 FY2018), and currently attracts an average of 14% share of total overnight visitation to South Australian regions.

Currently, the Region attracts a majority of visitors from Adelaide and other regions in South Australia, supported by a number of visitors also from Interstate. In terms of generational segmentation, the Region's visitors are represented strongly by the 55+ segment, with slightly fewer visitors from the Generation X and Y cohorts.

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

These positive growth forecasts for the industry however remain in limbo, due to the economic impact of the implementation of social distancing restrictions due the COVID-19 pandemic.

Whilst the metrics identified in this analysis offer indicators for the visitor economy, there are some gaps in the data, specifically around Visitor Sentiment and Dispersal, and the sample sizes for the NVS and IVS are also too broad to get a true indication of some of the more micro statistics relating to visitor spend and length of stay.

Therefore, it will be important moving forward that metrics to measure the growth of the visitor economy are identified, systematised, and reported on regularly to industry stakeholders, to ensure the value of the visitor economy is communicated and understood by the Limestone Coast community.

3.1 Total Regional Visitation

The Region currently attracts 1,356,000 visitors per annum. Of that total, 739,000 are day trippers (54%) and 617,000 overnight visitors (46%) annually. 93% of visitors to the Region are from within Australia, with 7% from International markets. Domestically, 56% are from within the state compared to 44% from Interstate. (Table 1)

Majority of people visit for holiday (49%) and visiting friends and relatives (30%). The region also attracts a significant proportion of Business travellers too (17%). (Table 2)

The Region's overnight visitation has grown slightly, with a dip at the end of 2014, and steady growth from there through to YE December 2018. (Figure 6)

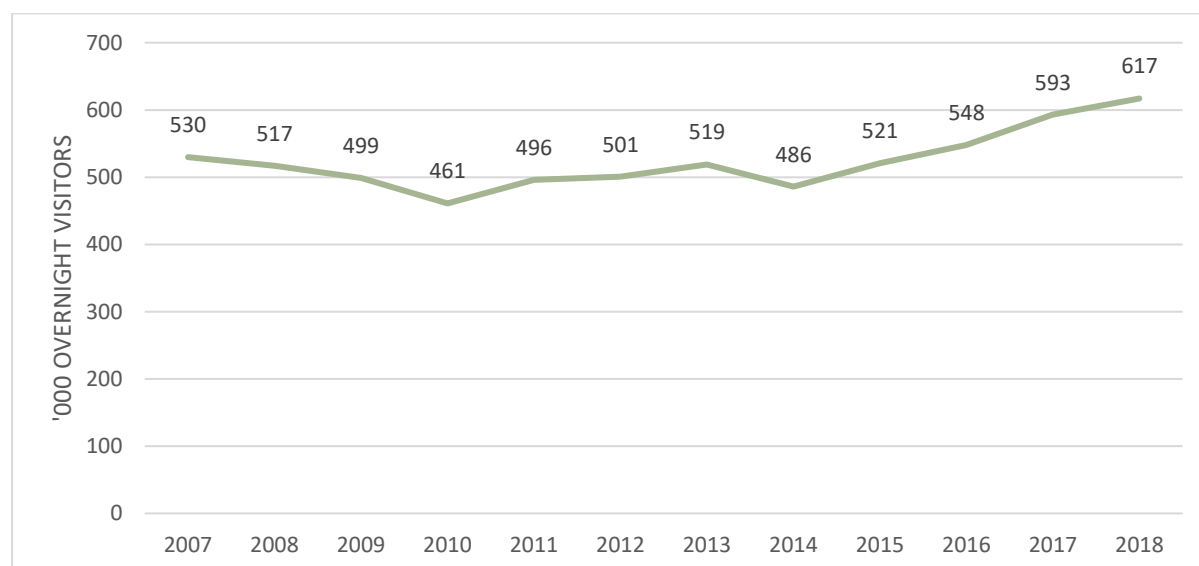
Majority of domestic overnight visitors to the Region state will stay 1-2 nights with an average of 3 nights, whilst inbound visitors either have a short stay (1-2 nights) or longer stays (7 nights), averaging 7 nights. (Table 1 and Figure 7)

Table 1 – Limestone Coast Tourism Region, Total Regional Visitation (2016-2018 Annual Average)

	Intrastate	Interstate	Total Domestic	International	Total Visits
Overnight Visits	320,000	253,000	573,000	44,000	617,000
%	56	44	93	7	100
Nights	962,000	742,000	1,704,000	297,000	2,001,000
%	56	44	85	15	100
Average Length of Stay	3	3	3	7	3
Average Annual Day Trips	739,000				

Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Figure 6 – Limestone Coast Tourism Region, Total Overnight Visitors (YE DEC 2007-YE DEC 2018)



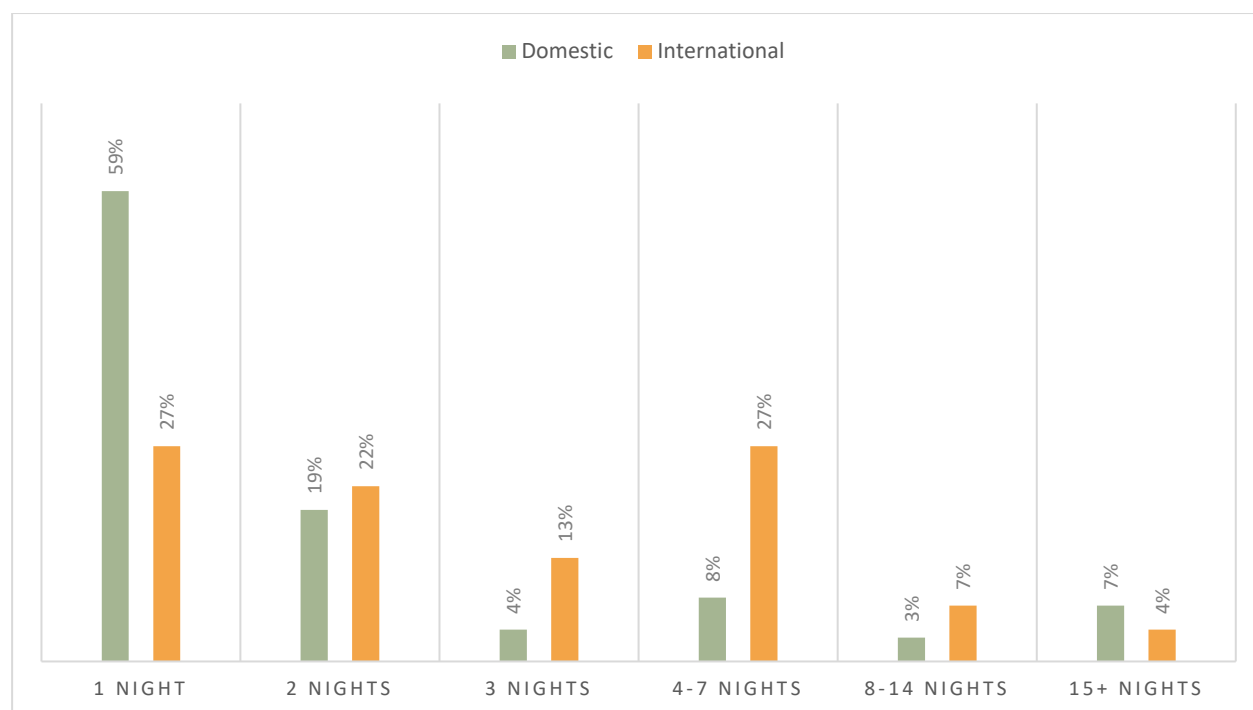
Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Table 2 – Limestone Coast Tourism Region, Purpose of Travel (2016-2018 Annual Average)

	Holiday	VFR	Business	Other	Total
Overnight Visits	303,000	185,000	106,000	30,000	617,000
%	49	30	17	5	100
Nights	936,000	668,000	259,000	138,000	2,001,000
%	47	33	13	7	100
Average Length of Stay	3	4	2	5	3

Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Figure 7 – Limestone Coast Tourism Region, Length of Visit, Domestic + International Visitors (2016-2018 Average)



Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

3.2 Market Segments

3.2.1 Geographic

Domestic Market

Intrastate visitation is currently the most significant market for the Region with over half (56%) of all overnight visitors to the Region originating from within South Australia (Figure 8).

The majority of interstate visitors to the Region are from Victoria (33%), which is more than the individual visitors from Regional SA and Adelaide. The region attracted small numbers of visitors from NSW (5%) and other locations around Australia. (Figure 8).

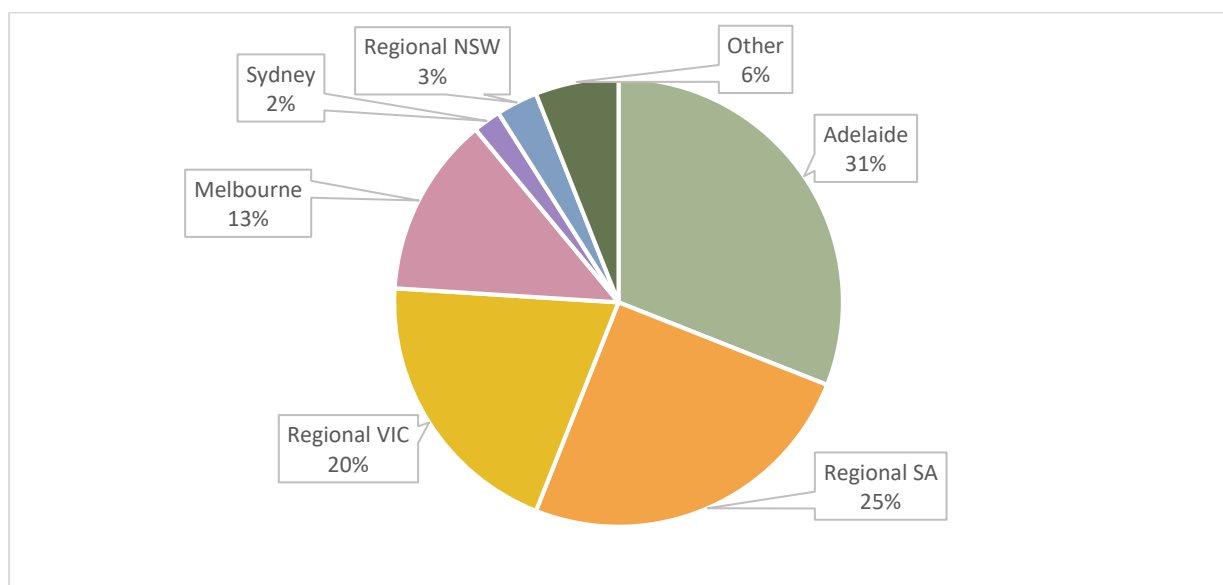
Nearly half of domestic visitors to the Region are coming for a holiday (47%), with a third coming to visit family and friends. The Business traveller is also a significant contributor to the domestic market, accounting for 17% of domestic travel to the Region. (Table 3)

Table 3 – Limestone Coast Tourism Region, Domestic Overnight Visitor Profile (2016-2018 Annual Average)

	Holiday	VFR	Business	Other	Total
Overnight Visits	303,000	185,000	106,000	30,000	617,000
%	49	30	17	5	100
Nights	936,000	668,000	259,000	138,000	2,001,000
%	47	33	13	7	100
Average Length of Stay	3	4	2	5	3

Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Figure 8 – Limestone Coast Tourism Region, Origin of Domestic Overnight Visitors (2016-2018 Annual Average)



Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Consultation with industry indicated strong representation of visitors from within South Australia, and visitors originating from Victoria, perhaps more than the TRA data indicates. Regional stakeholders identified these markets as typically self-drive, and only staying 1 night in their part of the region, often communicating that they wished they'd planned to stay longer.

It was also highlighted through consultation, that the Local market (residents from neighbouring towns) was a key opportunity, not only to holiday in their own backyard, but also to attract increased visitation from visiting friends and relatives (VFR). Additionally, it was identified that there was a strong repeat visitor base throughout the region (eg. summer coastal holidays in Beachport, Robe and Kingston).

International Market

International visitors to Region currently account for 7% of total overnight visitors, who account for 15% of total nights, with an average length of stay of 7 nights.

Of international visitors, the majority (86%) come for a holiday, with the remaining visiting friends and family, and for other reasons (Table 4).

Geographically, these visitors have been identified from traditional Western markets, with 44% from Europe, 16% from UK and 9% from New Zealand. Visitors originating from Asia account for 15% of all international visitors and are the highest yielding international visitor segment for the Region (accounting for 41% of international visitor spend). Interestingly, whilst the majority of international visitors originate from the UK and Germany, they represent the lowest yielding segment for the Region (7% and 4% respectively). (Table 5).

During industry consultation, it was noted the Region has seen visitation from Indian and Asian students VFR groups in the Region, along with a strong contingent of independent travellers from Europe, United Kingdom and New Zealand.

Table 4 – Limestone Coast Tourism Region, International Overnight Visitor Profile (2016-2018 Annual Average)

	Holiday	VFR	Other	Total
Visits	38,000	4,000	3,000	44,000
%	86	9	7	100
Nights	111,000	108,000	78,000	297,000
%	37	36	26	100
Average Length of Stay	3	27	26	7

Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

Table 5 – International Visitors, Visits, Nights and Expenditure (Annual Average YE Sept 2017 – YE Sept 2019)

Country	Visits	Share	Nights	Share	Expenditure	Share
United Kingdom	7,088	16%	18,726	6%	1,243,903	7%
Germany	5,844	13%	12,945	4%	769,950	4%
Switzerland	2,652	6%	5,566	2%	472,476	3%
New Zealand	3,993	9%	40,165	14%	3,122,462	17%
France	2,381	5%	7,447	3%	358,057	2%
Netherlands	2,185	5%	6,764	2%	336,576	2%
Other Europe	6,691	15%	56,523	20%	2,821,703	15%
North America	4,508	10%	24,265	8%	1,496,952	8%
Asia	6,804	15%	107,992	37%	7,491,660	41%
Other Countries	1,875	4%	9,415	3%	289,944	2%
Total	44,021	100%	289,807	100%	18,403,683	100%

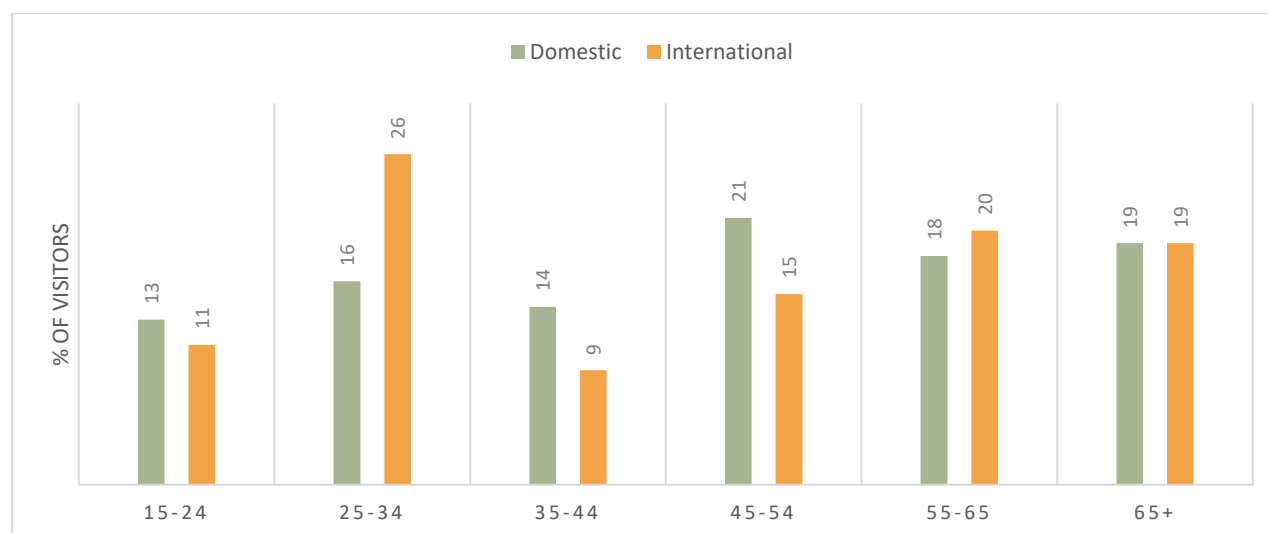
Data Source: Data supplied by SATC Research + Insights Team, February 2020

3.2.2 Generational

The Silent Generation (aged 77-97 in 2020) and Baby Boomers (aged 56-76 in 2020) are currently the largest generational market for the Region, with the majority of current visitors to the Region aged 55+ (39% Domestic, 37% International, see Figure 9).

The older Generation X (aged 41-56 in 2020) and younger Generation Y (aged 26-40 in 2020) also form an important part of the Region's current visitor profile, with a particular peak of international visitors in the 25-34 year-old bracket (26%).

Figure 9 – Limestone Coast Tourism Region, Age of Visitors (2016-2018 Average)



Data Source: SATC Limestone Coast Regional Tourism Profile 2016-2018

3.2.3 Market Segments + Niche Interests

During regional stakeholder consultation (**refer Acknowledgements**), various segments were identified by businesses and other key visitor economy stakeholders:

Market Segments

- Empty Nesters – Pre-Retirements, or Early Retirement Couples
- Grey Nomads – Low and high yielding
- Visiting Friends and Relatives
- Business Groups
- Families (all age groups)
- Young Professionals – Single Income No Kids

Niche Interests

- Events (including Niche interest and Sporting)
- Group Travel - RV/Motorcycle/Car Clubs, Niche Interest Groups (Probus, CWA, Sport)
- Great Ocean Road pilgrimage – Melbourne to Adelaide touring through to Kangaroo Island
- Adventure Cave Diving
- Weddings
- Nature Based / Ecotourism
- Heritage and History
- Agriculture
- Art and Culture
- Birdwatching
- Gamefishing
- Charity related visitors – Fun Runs, Cancer Council, Variety Club Bush

3.3 Visitor Sentiment

Sentiment analysis from the latest NVS and IVS data has identified the following insights from relevant markets:

Intrastate and Interstate

- Caves and craters of Naracoorte and Mount Gambier highly appealing
- Offers a good range of experiences that the whole family can enjoy
- Popular holiday destination for Victorians – Robe, Beachport

International

- Enjoying the great Ocean Road drive most popular
- Mount Gambier and the Blue Lake also popular.

Additionally, the following sentiment from the Mixed Dozen Wine Research Project has been identified:

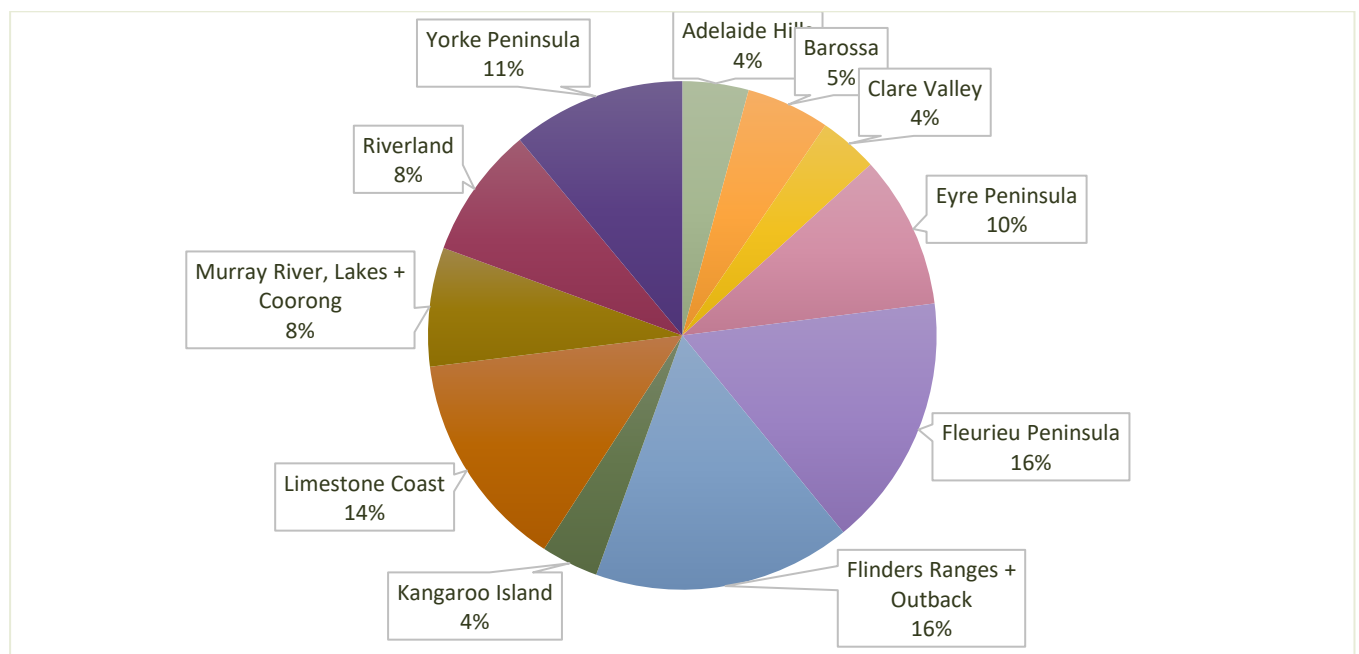
- Great natural assets, but low level of chance to interact – passive
- Low level of awareness with regard to knowing all of the things to do in the region
- Wine tourism experience is too narrow
- Shopping experiences could be enhanced

3.4 South Australian Regional Visitation

As at December 2018, South Australian Regions attracted an annual average of 4,802,000 overnight visitors across the State. Of that total, Fleurieu Peninsula and Flinders Ranges received the highest proportion of overnight visitors (16%), followed by Limestone Coast (14%). (Figure 10)

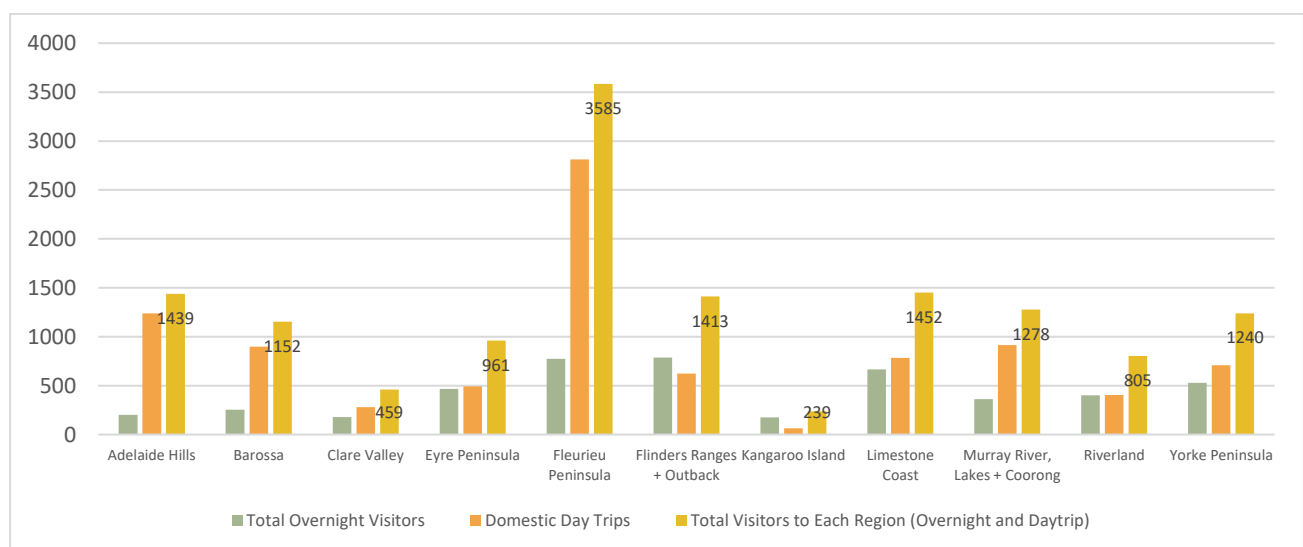
In terms of total overall visitor numbers, the Limestone Coast sits second in the State with an annual average of 1,452,000 visitors, to Flinders Ranges and Outback (with 3,585,000 annual average) (Figure 11)

Figure 10 - Average Annual % Share of Overnight Visitation to Regional South Australia (YE December 2010- YE December 2015)



Data Source – SATC Regional Tourism Profiles (2016-2018 Annual Average)

Figure 11 - Total Overnight Visitors, Total Day Trip Visitors and Overall Total Visitors for SA Regions (2016-2018 Annual Average)



Data Source – SATC Regional Tourism Profiles (2016-2018 Annual Average)

3.5 Economic Contribution

Analysing the economic benefit of the Visitor Economy for the Region can be analysed using two different data sources.

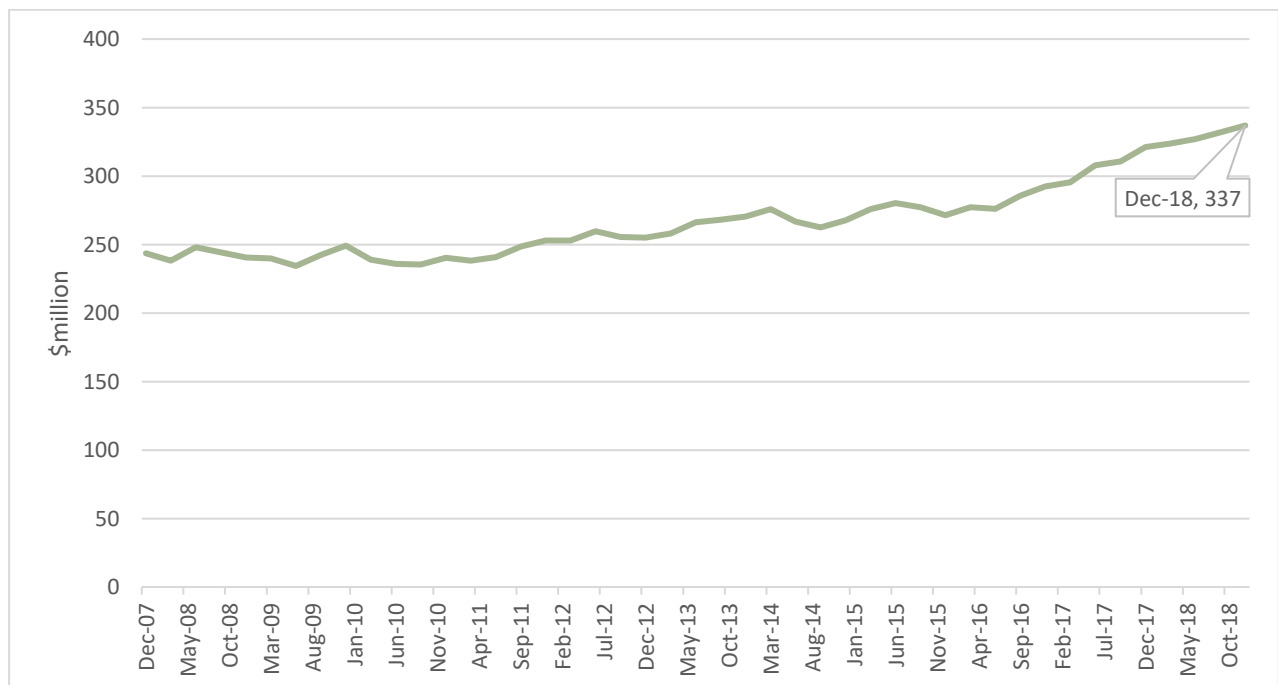
Firstly, SATC undertake ongoing analysis of the State's performance in terms of Tourism Expenditure. This data is the most relevant for the Region to consider in its planning process, as it is a 3-year rolling average of data curated from the most recent International Visitor Survey and National Visitor Survey, and it's regularly updated and communicated to industry.

Secondly, the TRA develop Regional Satellite Accounts for each Tourism Region in Australia. These accounts utilise data from the IVS and NVS, and also the Australian Bureau of Statistics. This data can be used more broadly as indicators by the Region to see the breakdown of where visitor monies are spent across all traditional and non-traditional tourism businesses.

3.5.1 Tourism Expenditure

The most recent data available via SATC indicates that the Region currently (YE December 2018) contributes \$337 million to South Australia's expenditure of \$6.8 billion (which is 74% of their 2020 target of \$457 million).³² (Figure 12)

Figure 12 – Limestone Coast Tourism Region, Total Regional Expenditure Timeseries (3 year rolling average, December 2007-December 2018)

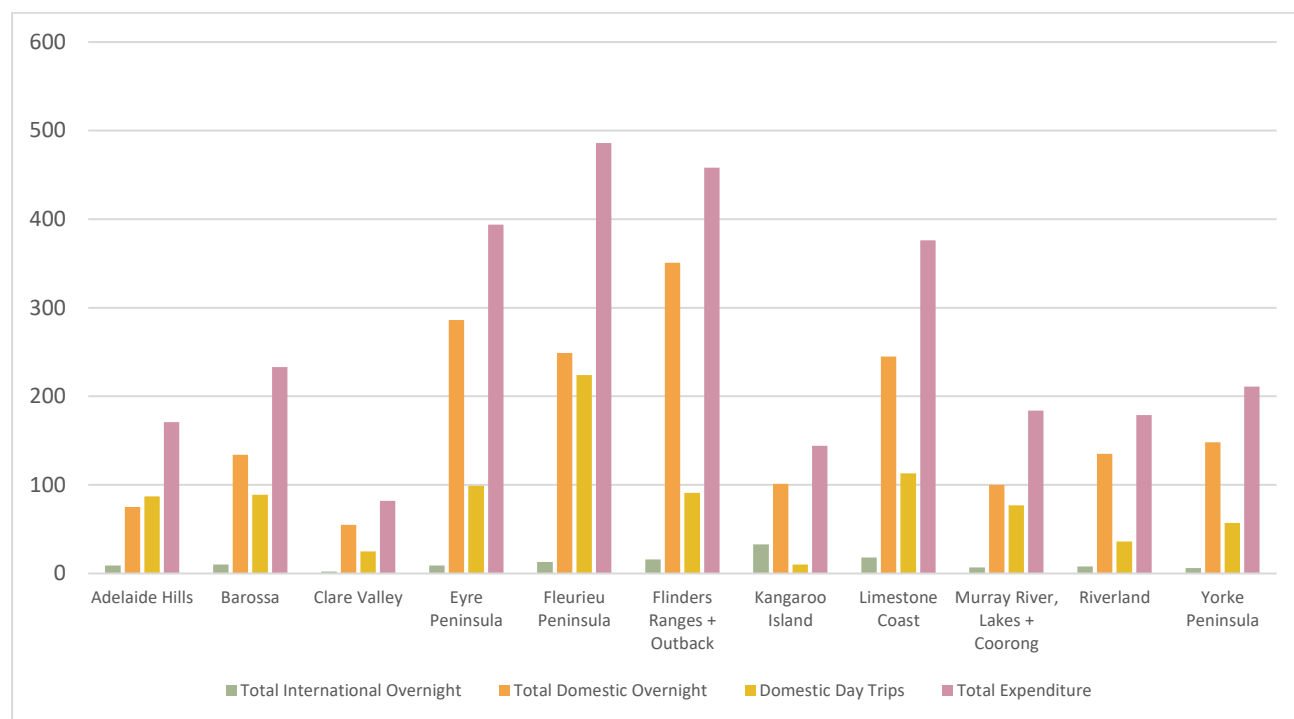


Data Source – Supplied by the South Australian Tourism Commission, Research + Insights Department, February 2020

³² South Australian Tourism Commission Regional Tourism Profile, Limestone Coast, 2016-2018

The Region has the 4th highest expenditure of all the tourism regions within South Australia. (Figure 13)
However, the Yield Per Overnight Visitor (as at YE September 2019) sits 6th to last in comparison to other tourism regions in South Australia. (Figure 14)

Figure 13 - South Australian Regions, Total Expenditure (YE September 2019)



Data Source: SATC Visit To Regions, Annual Average December 2016-December 2018 >

<https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={7B62E0BB-9B57-4783-996F-84EB22C68A7C}&B=False>

Figure 14 – SA Tourism Regions, Yield Per Total Overnight Visitors (YE September 2019)



Data Source: SATC Visit To Regions, Annual Average December 2016-December 2018

<https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={7B62E0BB-9B57-4783-996F-84EB22C68A7C}&B=False>

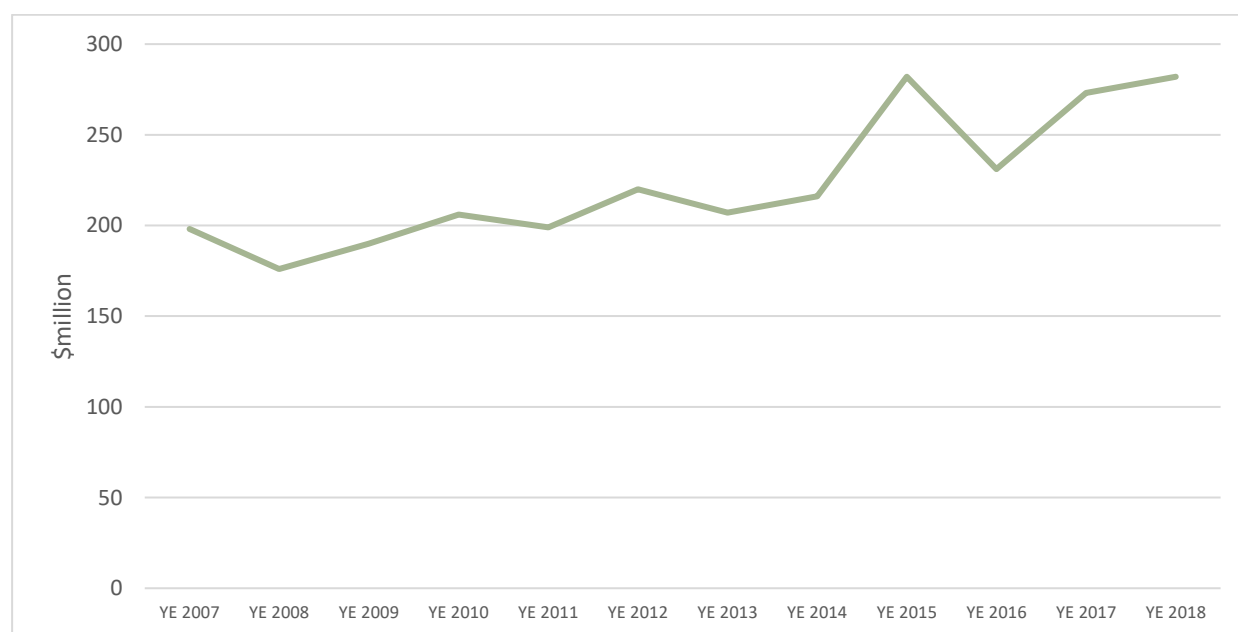
3.5.2 Tourism Output + Consumption

In terms of Information from TRA's Regional Satellite Accounts, in FY2018, the Region reached \$490.5million in total regional tourism consumption, which is up 3.6% from the previous financial year. Of that total, the tourism industry generated \$282million in gross regional product (GRP) (see Figure 15) (\$135.5million direct, \$146.5million indirect), up 3.3% from FY2017. The direct contribution of \$135.5million accounted for 3.4% of the Region's GRP.³³

In that same timeframe, the majority of visitor consumption in the Region was contributed by domestic overnight visitors 69%), followed by daytrips (23%) and International visitors (7%). (Figure 16)

The International visitor was the highest yielding (\$780.34 per visitor), closely followed by the Intrastate visitor (\$674.44). Interstate visitors yield was considerably lower than the Intrastate Overnight visitors at \$484.68, with Day trip visitors spending was considerably less than the domestic and international overnight visitors (\$152.66). (Table 6)

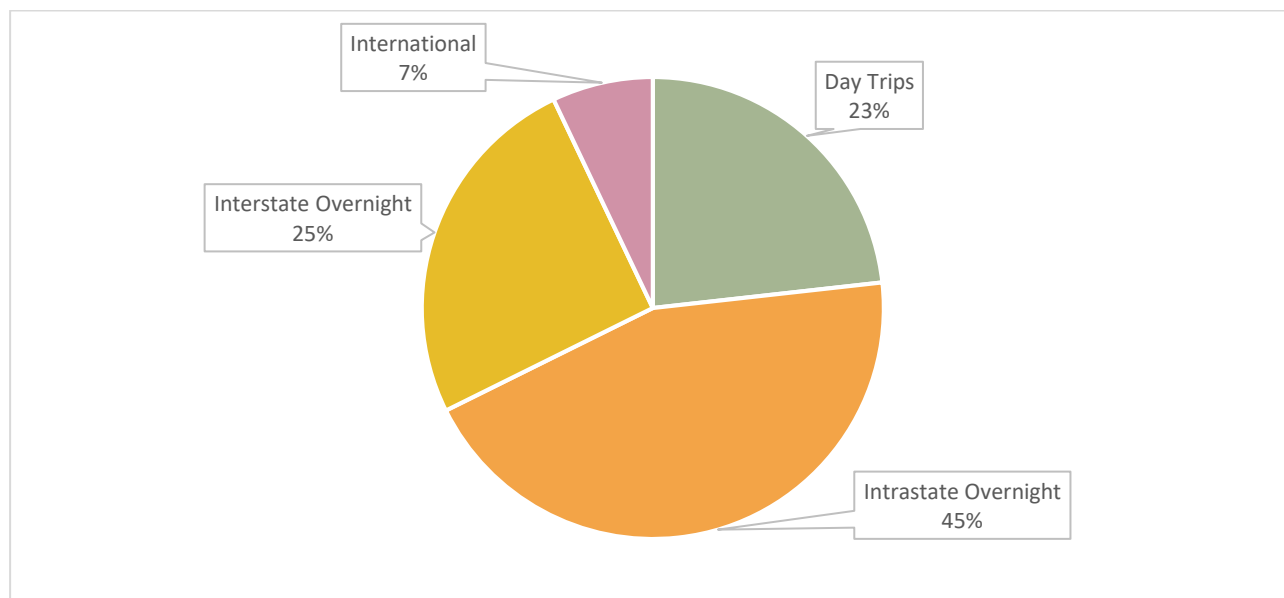
Figure 15 – Limestone Coast Tourism Region, Gross Regional Product (FY2007 - FY2018)



Data Source: Tourism Research Australia Regional Satellite Account, Limestone Coast 2017-2018

³³ Tourism Research Australia Regional Satellite Account, Limestone Coast 2017-2018

Figure 16 - % Share of Regional Consumption per Visitor Market (FY2018)



Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018, SATC Limestone Coast Regional Profile, 2016-2018.

Table 6 – Limestone Coast Tourism Region, Share of Regional Tourism Consumption for Visitor Markets (FY2018)

	Share of Total Regional Tourism Consumption	Visitor Numbers	Yield
Day Trips	112,815,000	739,000	\$152.66
Intrastate Overnight	215,820,000	320,000	\$674.44
Interstate Overnight	122,625,000	253,000	\$484.68
International	34,335,000	44,000	\$780.34

Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018, SATC Limestone Coast Regional Profile, 2016-2018.

3.5.3 Industry Share of Total Tourism Consumption + Gross Value Added (GVA)

As noted above, the total tourism consumption for 2017/2018 was \$490.5m. However, non-tourism dedicated industries generated a significant proportion of this total consumption with the benefit largely enjoyed by general travel retail (Table 7):

- \$78.5m on takeaway and restaurant meals
- \$51.3m on fuel; and
- \$86.5m on long distance transport.

This may be due to the fact that the region has been attracting majority day trips, and the touring baby boomer generation (see Section 3.2).

Table 7 – Limestone Coast Tourism Region, ANZSIC Share of Total Tourism Consumption 2017/2018

Industry	\$million
Accommodation services	35.5
Actual and imputed rent on dwellings	15.1
Takeaway and restaurant meals	78.5
Taxi fares	5.3
Local area passenger transportation	3.4
Long distance passenger transportation	86.5
Motor vehicle hire and lease	7.2
Travel agency and tour operator services	31.3
Recreational, cultural and sporting services	16.3
Gambling and betting services	4.3
Shopping (including gifts and souvenirs)	63.0
Food products	31.6
Alcoholic beverages and other beverages	21.4
Motor vehicles, caravans, boats, etc	14.2
Fuel (petrol, diesel)	53.1
Repair and maintenance of motor vehicles	4.2
Education services	7.5
Other tourism goods and services	12.3
Total Direct Tourism Consumption	490.5

Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

With regard to traditional tourism industries that generated the highest economic benefit in 2017/2018 were (Table 8):

- Food Services with \$26.4million
- Accommodation with \$26.2million
- Retail Trade with \$24.1million
- Transport with \$19.4million
- Education and Training with \$5.0million

Table 8 – Limestone Coast Tourism Region, ANZSIC Tourism Output (Gross Value Added) 2017/2018

Gross Value Added	\$million
Tourism characteristic industries	
Accommodation	17.3
Ownership of dwellings	8.9
Cafes, restaurants and takeaway food services	16.4
Clubs, pubs, taverns & bars	10.0
Rail transport	0.0
Taxi transport	2.9
Other road transport	2.6
Air, water and other transport	10.6
Motor vehicle hiring	3.3
Travel agency and tour operator services	12.1
Cultural services	0.7
Casinos and other gambling services	1.3
Other sports and recreation services	1.3
Total tourism characteristic industries	87.4
Tourism connected industries	
Automotive fuel retailing	2.6
Other retail trade	21.5
Education and training	5.0
Total tourism connected industries	29.1
All other industries	10.4
Direct tourism GVA	126.9

Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

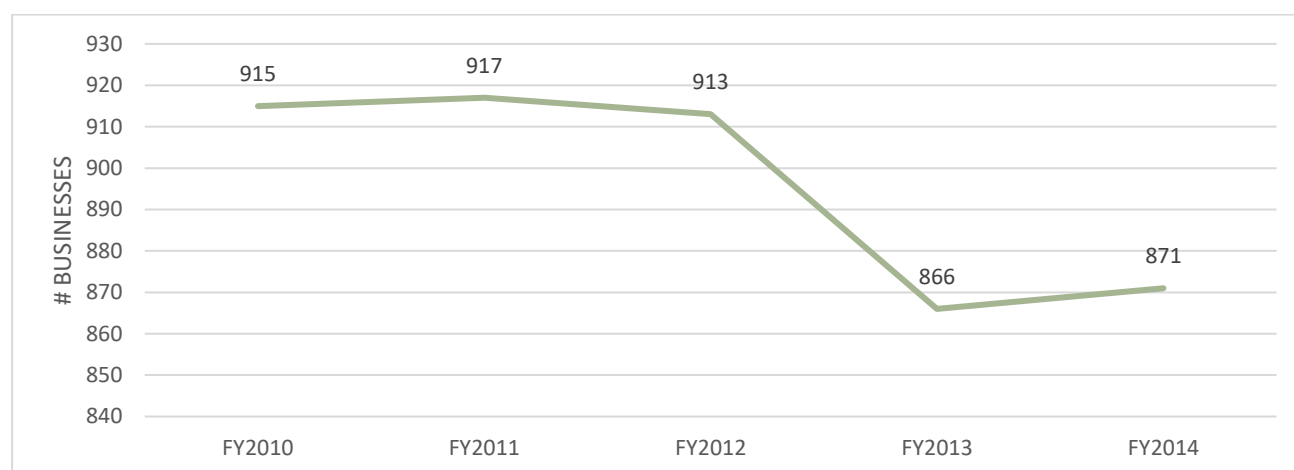
3.5.4 Tourism Businesses + Jobs

In 2013-2014, the Region supported 871 tourism related businesses in the Region³⁴ (Figure 17). In March 2018, it was reported that the Region had 765 tourism businesses.³⁵

In 2017-2018, the Region's visitor economy supported 3,000 jobs (2064 full and part time jobs, and 951 Indirect full and part time jobs) which is 6.2% of total regional employment.³⁶ (Figure 18)

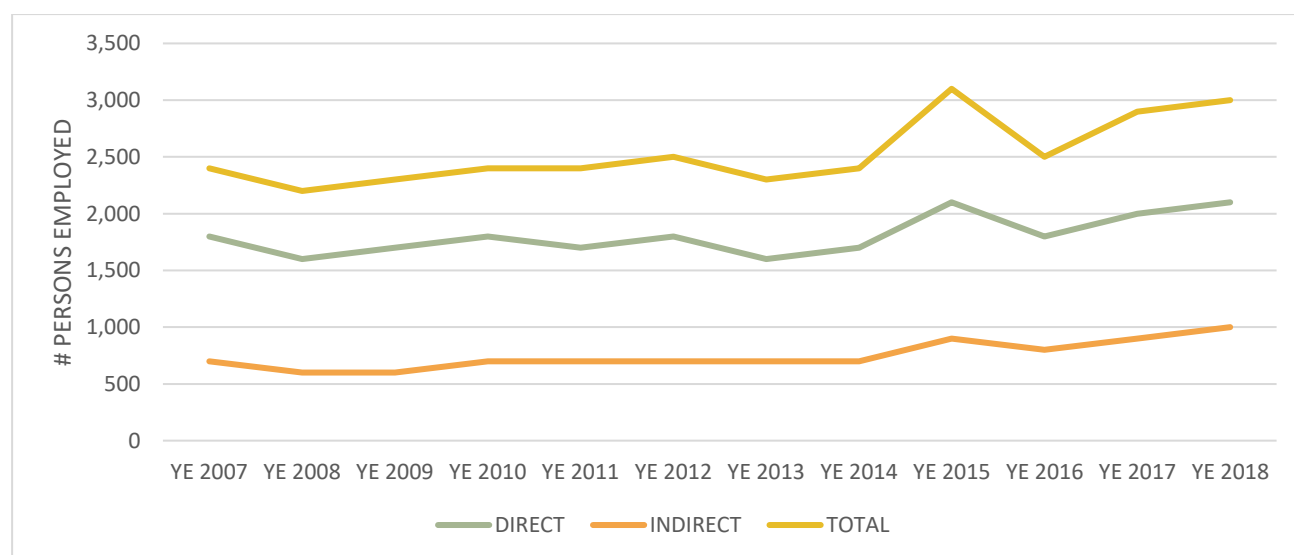
The total number of direct jobs are spread across numerous tourism related industries, with Food Services (29%), Retail (25%) and Accommodation (13%) accounting for the majority. (Figure 19, Table 9)

Figure 17 – Limestone Coast Tourism Region, Total Number of Tourism Businesses (FY2010 - FY2014)



Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

Figure 18 – Limestone Coast Tourism Region, Total Tourism Employment (FY07 – FY2018)



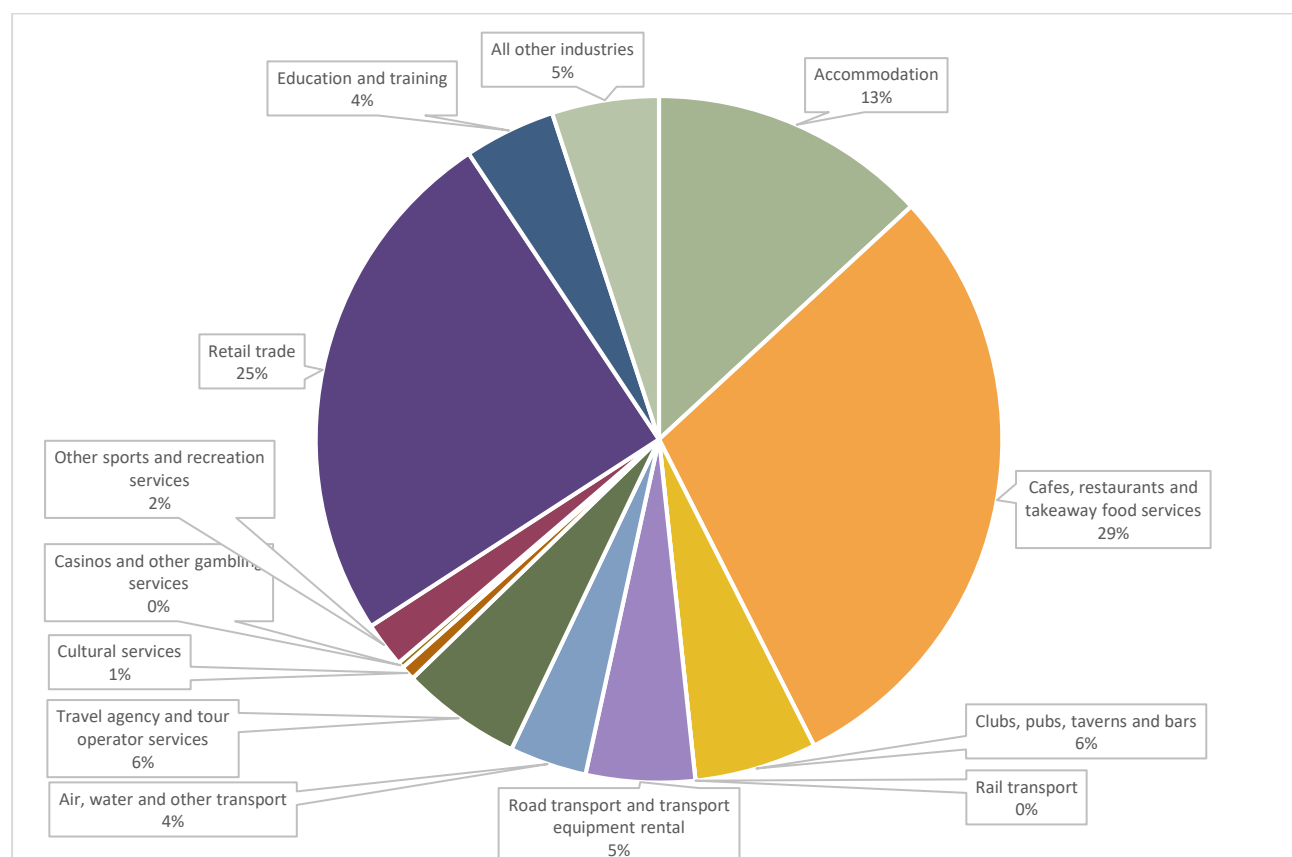
³⁴ Tourism Research Australia Limestone Coast Tourism Profile, Supply 2014-2015

³⁵ LCLGA Recovery and Rebuilding Action Plan, May 2020

³⁶ TRA Limestone Coast Region Tourism Satellite Account 2017-2018

Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

Figure 19 – Limestone Coast Tourism Region, ANZSIC Total Tourism Direct Jobs as a % (2017/2018)



Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

Table 9 – Limestone Coast Tourism Region, ANZSIC Total Tourism Direct Jobs 2017/2018

Accommodation	271
Cafes, restaurants and takeaway food services	607
Clubs, pubs, taverns and bars	119
Rail transport	0
Road transport and transport equipment rental	106
Air, water and other transport	75
Travel agency and tour operator services	117
Cultural services	14
Casinos and other gambling services	6
Other sports and recreation services	44
Retail trade	512
Education and training	89
All other industries	104
Total	486

Data Source: Tourism Research Australia Regional Satellite Account for Limestone Coast 2017-2018

3.4 Forecasts

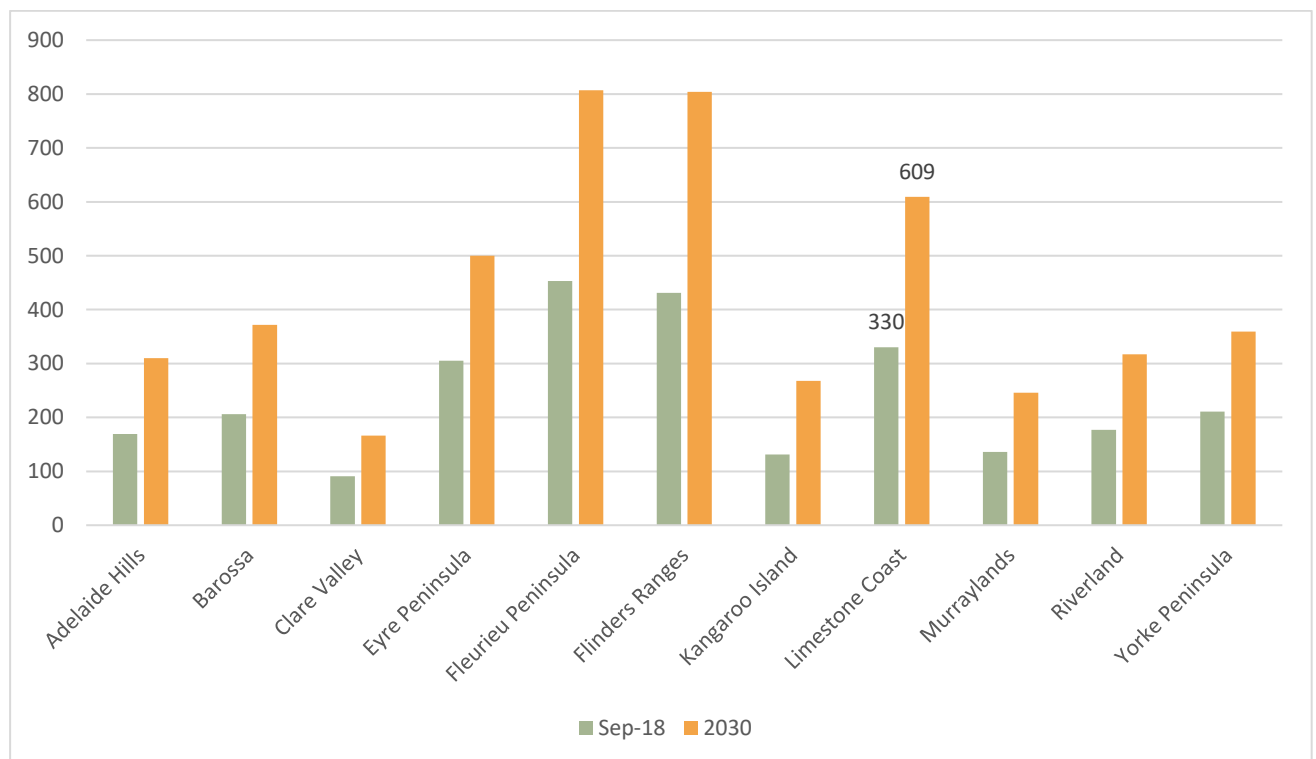
3.4.1 Economic Contribution

The SATC has reported that the Region is forecast to increase visitor expenditure by 79% from \$337m in December 2018 to \$609m in September 2030 (Figure 20). This growth percentage is significantly higher than the growth rate the region experienced from December 2007-September 2018, which was 38%.

Region specific forecast data indicates significant growth of tourism expenditure from June 2018 through to September 2030, reaching the forecasted \$609m. (Figure 21)

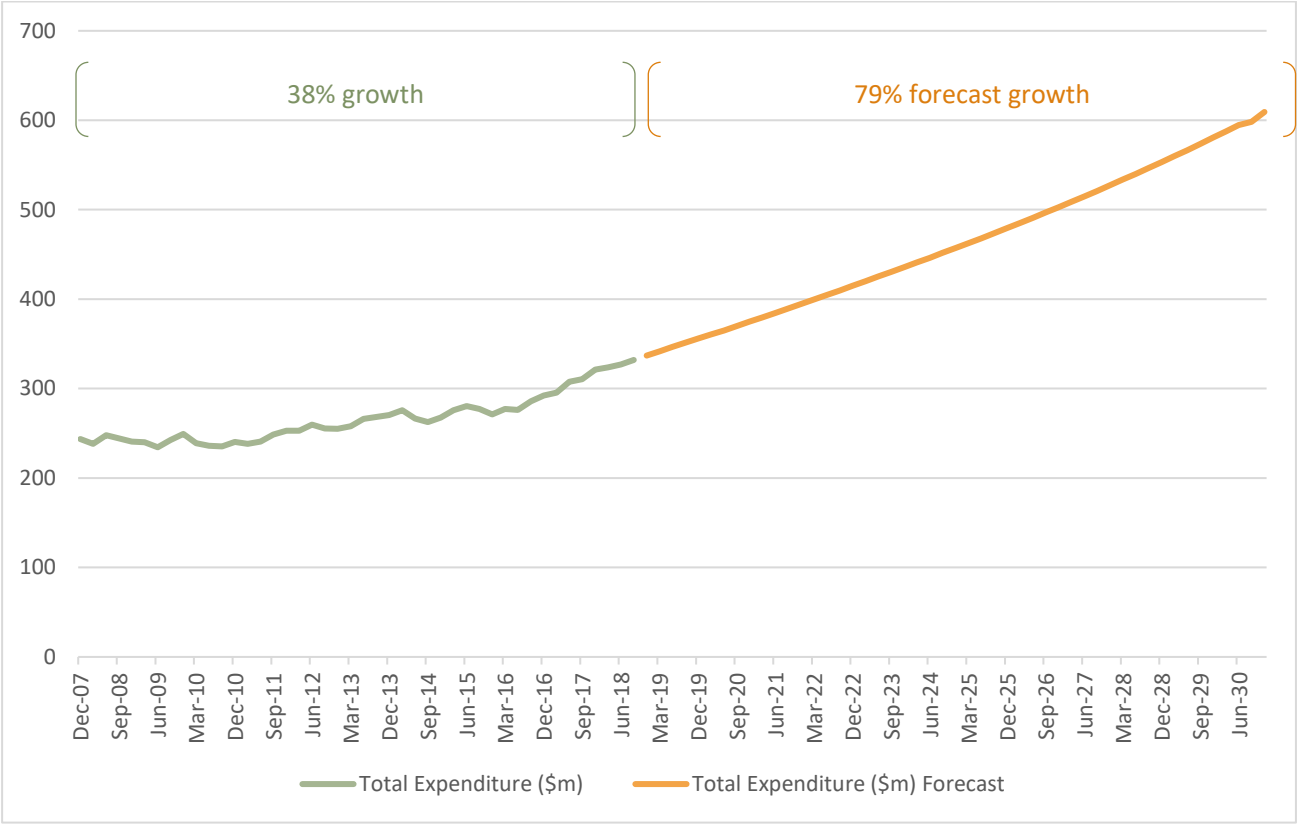
NOTE: Actual and forecast data taking into consideration the impact of COVID-19 is not currently available (as at August 2020). The South Australian Tourism Commission has suggested honouring these forecasts until new data is available which takes in the impact of COVID-19.

Figure 20 - South Australian Tourism Regions, Expenditure Forecast (2018 vs 2030)



Data Source: South Australian Tourism Commission, State Tourism Plan 2030

Figure 21 – Limestone Coast Tourism Region, Expenditure Actual + Forecast (December 2007 – September 2030)

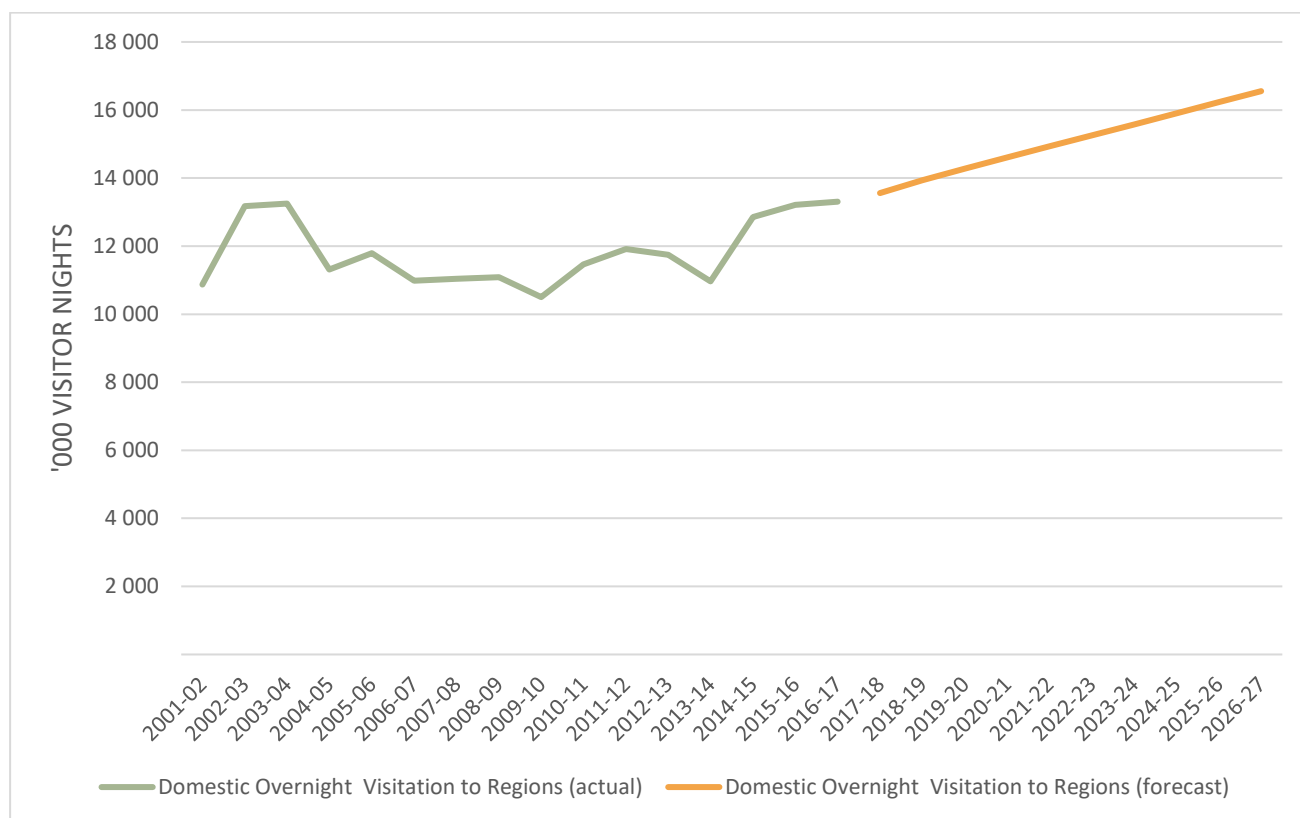


Data Source – Supplied by the South Australian Tourism Commission, Research department, February 2020.

3.4.2 Overnight Visitation

Overnight visitation to South Australian regions from both the domestic and inbound markets are due to increase from June 2018-2030, at 5-year annual average growth rates of 2.2% for domestic market, and 5.2% for the inbound market. (Figures 22 and 23)

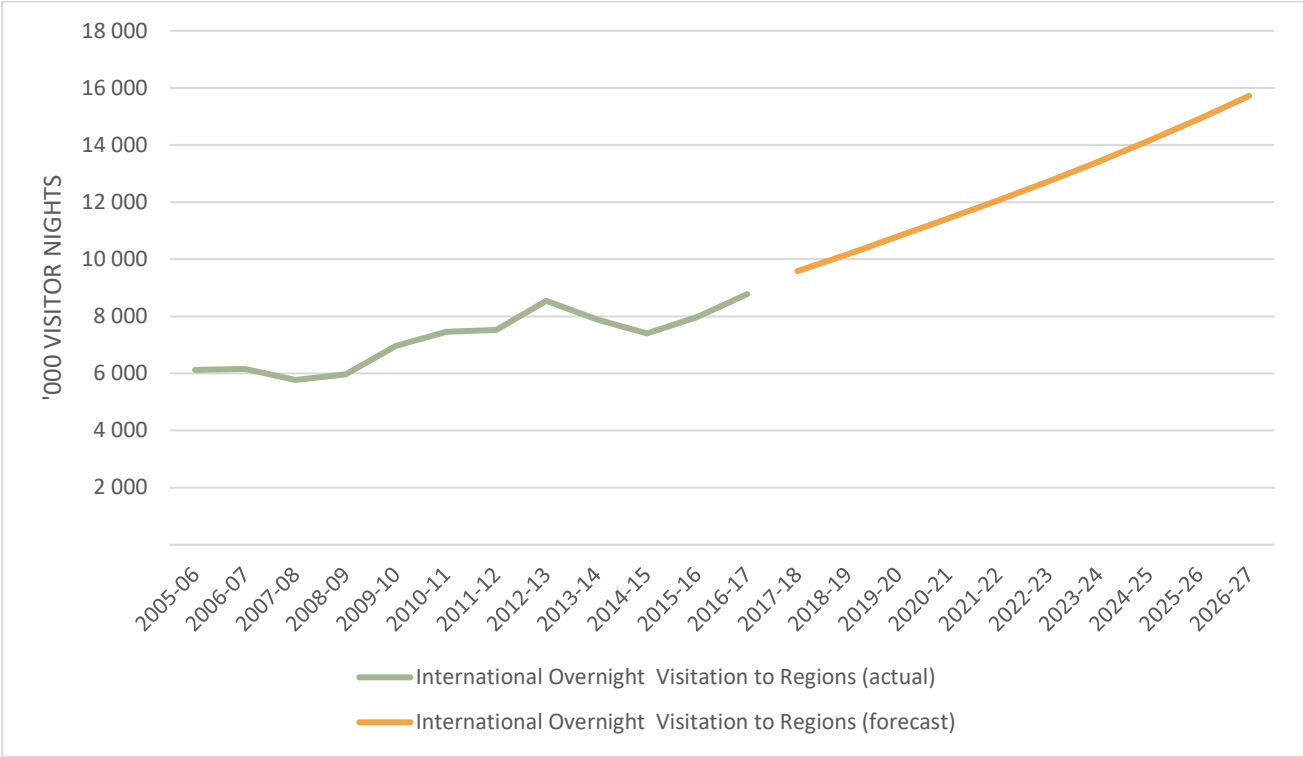
Figure 22 - Domestic Overnight Visitation to SA Regions, Actual + Forecast (2001-2027)



Data Source – Tourism Research Australia, State and Territory Forecast Tables 2017

(https://www.tra.gov.au/ArticleDocuments/257/State_and_Territory_Forecast_Tables_2017.xlsm.aspx)

Figure 23 - International Overnight Visitation to SA Regions, Actual + Forecast (2006-2027)



Data Source – Tourism Research Australia, State and Territory Forecast Tables 2017
(https://www.tra.gov.au/ArticleDocuments/257/State_and_Territory_Forecast_Tables_2017.xlsm.aspx)

4. Limestone Coast Visitor Economy Governance

Key Findings

The LCLGA are the governing custodians for the Limestone Coast Regional Tourism Industry. Funded by seven constituent councils within the region, the SATC and RDALC, the LCLGA employ a dedicated full-time resource to oversee the implementation of Priority 5 from the Limestone Coast Regional Growth Strategy (LCRGS) which has a focus on growing the regional visitor economy.

In addition to contributing funding to LCLGA, each of the seven constituent councils are contributing significantly to the visitor economy specifically relating to infrastructure, visitor servicing and events

There has not been a collaborative tourism and marketing strategy in place that all regional and local organisations are working towards in the last 10 years, even though they are all implementing activities to attempt to grow the visitor economy for the Region.

This indicates that investment in the region's visitor economy has been implemented in a siloed approach, which presents questions with regard to the effective and efficient use of the resources invested (human and budget) and whether efficiencies in resources has been investigated where goals and objectives for stakeholders align.

Additionally, there has not been an industry reference group established for the Region for the purpose of governing and collaborating with LCLGA on the implementation of the LCRGS.

The current governance structure of the tourism industry (where strategic planning and implementation doesn't involve ongoing consultation and communication with industry via a formal consultation and engagement process) unfortunately does not facilitate an effective and collaborative outcome. As a result, industry doesn't have a sense of ownership, which impacts their engagement levels and also their understanding of what is being done at a regional level to grow the visitor economy. This was evidenced by the fact that many of those who were consulted for this project did not know what the LCLGA Tourism Industry Development Manager was implementing, even though they knew the Manager was 'really busy'.

It's evident that the missing link is the formation of a regional industry voice in the ongoing planning and implementation of strategic projects – this doesn't necessarily need to be the development of a new not-for-profit organisation, but a formal reference group.

4.1 Regional Tourism Governance Background

Limestone Coast Tourism Inc. was a membership organisation and the peak marketing body for the region until 2010. The funding model included membership, co-op marketing activities and local government contributions – all of which was matched by the South Australian Tourism Commission. The operating budget was circa \$650k pa and employed 4 FTE (Manager, Membership Liaison, Events & Administration).

In 2011, a regional tourism restructure resulted in some centralisation of marketing assets, which depleted the value proposition for membership and hence the organisation folded.

The Limestone Coast Local Government Association (LCLGA, originally called South East LGA, SELGA) agreed to maintain investment in this program and was hosted by Regional Development Limestone Coast (RDALC). In 2015, the LCLGA brought the program into their remit based on alignment of visitor servicing investment across seven constituent councils including; City of Mount Gambier, District Council of Grant, Kingston District Council, Naracoorte Lucindale Council, District Council of Robe, Tatiara District Council & Wattle Range Council.

In 2016, the LCLGA board endorsed the establishment of a Tourism Management Group, an official sub-committee of the LCLGA Board with representation from each of its' constituent councils. The group first identified the role of local government in regional tourism, then conducted an environmental scan, considered emerging trends and markets and how to partner with industry to drive growth. The result was the need for clear focus and direction, a plan to align resources and effort by work collaboratively. In 2017, the LCLGA endorsed a regional tourism strategy called 'Priorities to Grow the Visitor Economy by 2020' - this outlined the 5 priority areas that provided a pathway for growth across the visitor economy on the Limestone Coast.

In the meantime, an industry led group called the Limestone Coast Collaborative (LCC) initiated and delivered a project to create a regional brand that was built and owned by industry. It was important and relevant that this project occurred in-line with the development of other tourism mechanisms across Local and State Government. The LCC disbanded shortly after delivering on the branding project.

The below regional Tourism Framework (Table 10) was created that identified roles and responsibilities as a number of moving parts worked towards a common goal of creating a Limestone Coast Regional Brand and Market Position. This was achieved in December 2016.

Table 10 - Limestone Coast Regional Tourism Framework 2016

Limestone Coast Collaborative (Industry)	Regional Tourism Development Manager	South Australian Tourism Commission	Limestone Coast Local Government
Industry-led	Experience Development	Guidance	Visitor Services
Brand Development	Industry Development	Support	Event Support
Business Building	Packaging	Expertise	Infrastructure
Workshops	Travel Trade	Destination Action Plan	Regional Trails
Networking	Consumer Shows	Marketing	Images
	Local Contact Person (SATC)		Content
	Local Expertise		Industry Support
	Relationship Management		Industry Development
			Industry Networking
			Destination Marketing

4.2 Limestone Coast LGA

In 2020, the LCLGA undertakes a co-ordinating, advocacy and representational roles on behalf of its Constituent Councils at a regional level including a regional tourism program – a partnership between the Limestone Coast Local Government Association and the South Australian Tourism Commission.

4.2.1 Strategic Planning

In 2016, the LCLGA launched the 'Priorities to Grow Tourism in the Region 2020' strategic plan. The Plan outlined 5 priority areas and numerous key actions to drive growth of the visitor economy.

The 'Priorities to Grow Tourism in the Region 2020' worked in parallel to the development of the a 'Limestone Coast Regional Growth Strategy' (LCRGS). The strategy highlights that a well-coordinated, collaborative, and strategically focused effort can set the Limestone Coast region on the path to deliver a 20% lift in economic performance, adding \$700 million in growth annually and more than 5,700 new jobs by 2026.

Within the LCRGS sits a dedicated priority for the Region's visitor economy – 5. Region-wide collaboration to develop a more coordinated tourism market.

Key strategic directions identified under this priority area include:

5.1 Resource and strengthen the capability of the Limestone Coast's regional tourism organisational framework (RTO), enabling strong leadership, management, coordination and delivery of regional tourism activities lifting visitor numbers, length of stay and spend per head.

5.2 Through the RTO, deliver regionally coordinated destination marketing activities, clearly targeting highest priority domestic and international opportunities for growth, aligned with well-defined regional 'hero experiences' and associated high quality local tourism offerings.

5.3 Deliver regionally coordinated tourism destination and industry development activities, through the RTO, in partnership with the South Australian Tourism Commission (SATC), Limestone Coast region councils and local tourism businesses.

5.4 Seek investment in regional tourism infrastructure, marketing, destination and industry development activities that are aligned to strategic goals and lift the overall quality, variety and packaging of offerings available to visitors in domestic and international markets.

In June 2020, the LCLGA TMG endorsed a Limestone Coast Recovery and Rebuilding Actions Plan, which will act as a bridging action plan between now and the launch of the new Destination Tourism + Marketing Plan 2025.

4.2.2 Funding Sources

Since LCLGA has been the peak body for tourism in the Limestone Coast, the seven constituent councils contribute \$110K per annum, along with \$65K from the South Australian Tourism Commission. An additional \$20-30K is also made available from LCLGA Members Equity.

Historically, the LCLGA contributed up to \$190k per year to Limestone Coast Tourism, which was matched 2:1 with SATC \$247k per year and employed 3-4 FTE. Through activities like co-operative marketing, the regional tourism program annual turnover was circa \$650k.

The funding allocated toward LCLGA is in addition to the collective budget spent by the 7 constituent councils, which is an \$2.5m per annum.

4.2.3 Resourcing

The LCLGA employ the only dedicated tourism resource for the Limestone Coast Region, the Tourism Industry Development Manager (TIDM), which is a full-time role and has been in employment since 2010, initially housed with Regional Development Australia LC.

This role is assigned to implementing the tourism priorities within the LCRGS, and managing the budget allocated for tourism related initiatives and aligning the collective investment across visitor serving in the region.

4.2.4 Reference Groups

To support the TIDM to implement the Regional Growth Strategy, the LCLGA established the Limestone Coast Local Government Tourism Management Group (LCTMG) and consists of representatives from each of the constituent councils. This group meets regularly to review the progress in achieving the objectives within the LCRGS.

The LCLGA TIDM also sits on the Limestone Coast Economic Development Group (LCEDG), another group established by LCLGA to be the custodians of the LCRGS, with the purpose of driving sustainable economic growth in the Limestone Coast region. It does this by being a significant influencer of stakeholders and investors, advocating regional priorities, supporting unique opportunities for business growth and mobilising regional action. Other members of this group include representatives from the:

- Limestone Coast Local Government Association
- Regional Development Australia Limestone Coast
- South East Natural Resources Management Board
- Primary Industries and Regions South Australia (PIRSA)
- Department of State Development
- Australian Government Department of Industry

4.3 Local Government

Whilst LCLGA are the official peak body for the visitor economy in the Limestone Coast, the constituent councils invest significant resources outside of their commitment to LCLGA.

Each of the seven local government organisations play a slightly different role in their local visitor economies. The table below (Table 11) offers a snapshot of the commitment and investment each Council has in the Region's visitor economy. **Remembering that in addition to this, each council contribute significant funding toward a dedicated tourism program via the Limestone Coast LGA.**

Through consultation, the LGAs shared the common sentiment to invest in the enhancement of the visitor economy for their local economies and for the region as a whole, as long as it's strategic and investment can be measured.

Table 11 - Snapshot of Local Government investment in their local visitor economies

	VISITOR ECONOMY STRATEGIC PLANS	RESEARCH PROJECTS	RECENT/CURRENT MAJOR TOURISM PROJECTS/EVENTS	PROVISION OF FUNDING FOR TOURISM PROJECTS	DIRECT TO CONSUMER MARKETING	TOURISM RESOURCE (PROJECTS)	VISITOR INFORMATION SERVICING	MANAGE TOURISM PRODUCT / EXPERIENCE
City of Mount Gambier	<p>CMG Community Plan – The Futures Paper 2016-2020</p> <p>Implementation of recommendations of the Visitor Information Services Review (2017)</p> <p>Mount Gambier City Growth Strategy 2017-2027 (Acil Allen)</p> <p>Culture and Heritage Plan (2017)</p>	<p>Economic Scorecard Snapshot</p> <p>2017 Mount Gambier Tourism Data Collection</p>	<ul style="list-style-type: none"> • Tourism and Visitor Information Service Review March-June 2017 • Tourism Mount Gambier Strategy (2017) • Guides of Mount Gambier Project • Tourism Industry Evenings • Australian Traveller Magazine Print Editorial • SATC Winter Campaign • 7 Wonders of Australia by Experience OZ • The Living Room • Discovermountgambier.com.au website and digital marketing implementation • Blue Lake activation (Crown and SA Water liaison) • RV Friendly Town status approved • Signage Strategy and Action Plan • Signage Masterplan proposals in progress 	<p>Events Budget (\$440K 2018/2019)</p> <p>Economic Development Budget for identified projects</p> <p>Annual funding provided to Tourism Mount Gambier</p>	<p>Via destination marketing investment (see section 9) and Visitor Servicing Investment (see section 10)</p>	<p>1 x FTE (new role Tourism + Events Manager)</p> <p>2 x FTE VIC</p> <p>3 FTEs in Events Team</p>	<p>Mount Gambier Visitor Centre (VIC)</p>	<p>Blue Lake</p> <p>Umpherston Caves</p> <p>Engelbrecht Caves</p> <p>Main Corner Complex/Riddoch Art Gallery</p> <p>Cave Gardens</p> <p>Lakes, Trails, Caves + Gardens across town</p> <p>Centenary Tower</p>
District Council of Grant	<p>Visitor Economy highlighted in the Council's Strategic Plan – Goal 2: Economic Opportunities Pursued and Promoted – Outcome 2</p> <p>Draft Tourism Plan (in progress)</p>		<ul style="list-style-type: none"> • Tourism Signage Strategy 2018/2019 Implementation (Ongoing, approximately \$10K each year) • Map of Council area (currently in production) • Activation of public use along Glenelg Riverv (Donovans) • RV Park Feasibility • Airport Masterplan Activation (exhibition space, meeting rooms, new logo, aviation museum) • Large scale event at Airport in 2021 – information not released. • \$250K secured for camping, pontoons at Donovan (Glenelg River NP). 	<p>Events Funding</p>	<p>Via Visitor Servicing Investment – see section 10</p>	<p>.6 FTE (covers tourism and other economic development projects)</p>	<p>Port MacDonnell Community Complex (VIO)</p>	<p>Mount Gambier Airport</p>

	Airport Masterplan 2016-2026							
Wattle Range Council	Visitor Economy highlighted in the Council's Strategic Plan – Economic Prosperity - Strategy 2.5 Tourism Plan - TBC	Review of Visitor Information Centres (due for release mid 2020)	<ul style="list-style-type: none"> Recreational Vehicle (RV) Park located at McCorquindale Park Hosting of 2018 VIC Conference Review of VICs in the region Investigate sites for free camping and RV friendly camping sites Capital upgrades at the Southern Ocean Tourist Park (owned by council) Campaign to live, work, play in the region (domestic + international) Great Victorian Bike Ride (November 2019) Mainstreet Masterplans (for towns) Penola to Coonawarra Bike Trail (proposed) GeoVenture 2020 (postponed) 	Community Funds Budget	Yes via Visitor Servicing Investment – see section 10	1 x FTE	3 x VICs in the Penola, Millicent and Beachport	Southern Ocean Tourist Park Penola Caravan Park
District Council of Robe	Visitor Economy highlighted in the Council's Community Plan 2019-2039 – Theme 2: Economic Development		<ul style="list-style-type: none"> Feasibility study for a Conferencing Facility (in progress) Support function of Robe Tourism Association Development of new brochures (for VIC) Signage and Wayfinding Strategy (proposed) New Tourism and Events Manager 	Events Funding	Yes via Visitor Servicing Investment – see section 10	1 x FTE	Robe Visitor Information Centre (VIC)	Nil
Kingston District Council	Visitor Economy highlighted in the Council's Community Plan 2019-2029 – Theme 1: A thriving Destination		<ul style="list-style-type: none"> Mainstreet Masterplan Kingston Foreshore Festival – 5th January 2019 Public Art Strategy development Kingston Foreshore Caravan Park Development 	Events Funding	Yes via Visitor Servicing Investment – see section 10	1 x FTE (not 100% dedicated)	Kingston (VIO)	Kingston Foreshore Caravan and RV Park
Naracoorte Lucindale Council	Visitor Economy highlighted in the Council's Strategic Plan 2016-2026 – Theme 1: Prosperous		<ul style="list-style-type: none"> Caves Connection Project: <ul style="list-style-type: none"> Naracoorte Caves Connection Business Prospectus complete Naracoorte Caves Trail Working Group formed in February 2019 and working on the project University of Adelaide – Fossils Project 	Annual investment in NLBTA Business Innovation Fund	Yes via Visitor Servicing Investment – see section 10	1 x FTE	Naracoorte (VIC)	Sheep's Back Museum

	<p>Community: Outcome 1.</p> <p>Community Art Framework 2016-2026 – Cultural Tourism + Placemaking</p> <p>Naracoorte Caves Connection Project Statement 2017</p>		<ul style="list-style-type: none"> • Naracoorte Aerodrome Upgrades – Taxiway Extension Design and Survey Work Completed • Naracoorte Lucindale Business and Tourism Association – TV Advertisement • Wayfinding Project – signs installed MacDonnell Street / Stewart Terrace corner and Gordon Street / Deviation Road corner. • Naracoorte Regional Sports Centre Masterplan (consultation closed 30th March 2020) • Open Space Strategy Review 2017-2022 • Mainstreet Masterplans for townships 	<p>Events Funding</p> <p>Community Art Fund</p>				
Tatiara District Council	Tatiara Economic Development and Tourism Strategy 2020-2024		<ul style="list-style-type: none"> • 2020 Masters Games (Postponed due to COVID19) • Diesel and Dirt Derby – annually in March • Walkway gallery – 102 Artists shown, 63 educational tours in 2018/2019 • Investment in consumer direct marketing strategy and digital assets (website, social media) • Master planning for Sport and Recreation Facilities for each town 	Events funding	Yes via Visitor Servicing Investment – see section 10	1 x FTE Projects	Bordertown (VIC)	<p>Bordertown Caravan Park</p> <p>White Kangaroo Park</p> <p>Civic Centre (Walkway gallery)</p>

4.4 Regional Tourism Leadership

Since the disbandment of the Limestone Coast Tourism Inc. in 2010, there had not been a single, whole of region, industry body established to assist in governing the regions tourism industry. That was until the from the Limestone Coast Collective, a reference group which was broader than just tourism however had representatives from the major tourism stakeholders in the region.

The LCC was formed in collaboration with PIRSA and LCLGA for the primary purpose of developing the regional brand (which is did so in 2016 details of the Regional Brand are in Section 9). Since the completion of the brand project in 2016, the LCC disbanded.

To establish a regional voice that represents the operators within the region, there has since been attempts by the LCLGA TIDM to establish a Regional Tourism Leadership Group (2017)³⁷ and also the attempt to implement a set of Limestone Coast Performance Pillars (2017)³⁸ to identify the priorities for industry.

Responsibility of Industry development was to be provided by RDALC and once industry capability was past the 101 stages, relevant tourism operators were introduced to the LGLCA Tourism Manager to help with specifics around setting up a tourism business.

In the meantime, some of this work was picked up in the Mixed Dozen Project and LCLGA utilised the Performance Pillars to determine resourcing and best proponents to build bookable experiences. The model worked well and can be replicated if more resources can be allocated.

The current governance structure of the tourism industry (where strategic planning and implementation doesn't involve ongoing consultation and communication with industry via a formal consultation and engagement process) unfortunately does not facilitate an effective and collaborative outcome. As a result, industry doesn't have a sense of ownership, which impacts their engagement levels and also their understanding of what is being done at a regional level to grow the visitor economy. This was evidenced by the fact that many of those who were consulted for this project did not know what the Manager was implementing, even though they knew the Manager was 'really busy'.

It's evident that the missing link is the formation of a regional industry voice in the ongoing planning and implementation of strategic projects – this doesn't necessarily need to be the development of a new not-for-profit organisation, but a formal reference group.

³⁷ LCLGA Information Report – From LCLGA Tourism Industry Development Manager to the LCLGA CEO Group, March 2018

³⁸ LCLGA Information Report – From LCLGA Tourism Industry Development Manager to the LCLGA CEO Group, March 2018

5. Visitor Experiences

This section outlines the tourism experiences in the Limestone Coast and those which offer the competitive advantage for the region. It also identifies the gaps in experience profile in being able to effectively target the Region's growth markets.

Key Findings

The Limestone Coast is home to an established tourism industry of over 750 visitor experiences, with welcoming, visitor-focused town and communities offering accommodation, dining, retail, cultural and historical attractions and visitor information centres.

The hero experiences of the Region are centered around the natural landscapes of volcanoes, craters, lakes, caves, sinkholes, swaps, ancient coastline and forests. These include Naracoorte Caves (SA's only World Heritage Site), The Blue Lake, Umpherston Sinkhole, Piccaninnie Ponds and Ghost Mushroom Lane. Cave diving/snorkelling, fishing, coastal 4wding and birdwatching are also niche interest activities driving visitation to the region.

Coonawarra is the Region's hero wine region, along with Padthaway, Cape Jaffa, Mt Benson and Mount Gambier offer a growing number of cellar door experiences, while there is a growing regional dining scene.

These hero experiences are underpinned by a thriving agricultural industry, and cultural and historical melting pot which permeates each and every experience in the region.

While the Region already has a strong visitor economy, it's successful recovery from COVID-19 and ability to add ongoing value to its local communities will be hindered by supply issues, including:

- Limited availability of commissionable product (accommodation, tours, attractions), is impacting the ability for Travel Trade and Group Tours to increase Limestone Coast product in Great Ocean Road/ Melbourne to Adelaide touring itineraries.
- Many key natural attractions are free or low cost, and don't encourage longer stays. These include the Blue Lake, Umpherston Sinkhole, Mount Shank, Bool Lagoon and some National Parks.
- Under activated natural assets (Forests, Lakes, Lagoons, Caves and Volcanoes) for recreational/leisure activities such as walking / cycling / camping / water-based activities.
- A lack of quality 4-5-star group accommodation in Mount Gambier and Coonawarra, as well as a large supply of aging motel stock.

Some of the key opportunities for the Region to grow quality visitor experiences in the Region are already underway, including:

- The 'Naracoorte Caves Connection Business Prospectus', to activate further economic benefit from the Caves to Naracoorte and surrounding region
- The expansion and connection of cycle / walking trails within the Region through the foundation work of the *Limestone Coast Regional Trail Feasibility Study* (refer Section 7)
- Activation of nature based adventure tourism experiences around the Region's natural assets
- Development of additional food and wine experiences that showcase the Region's clean, green premium agriculture, wine, horticultural and fishing industries, to capture growing consumer demand and interest in food provenance.
- City of Mount Gambier in discussions with SA Water and proposed Masterplan Development, which could allow for development of future visitor experiences at the Blue Lake, such as food and beverage, function space and viewing platforms.
- Expanding the understanding and experience for visitors in the Region around the Boandik and Ngarrindjeri

5.1 Region Overview

The Limestone Coast is located in South Australia's South East and is a key destination for visitors travelling between Melbourne to Adelaide via the Great Ocean Road or inland routes. (See Figure 24)

Figure 24 – Limestone Coast Region



Each of the Local Government Organisations in the Region have their own unique mix and flavour of the Limestone Coast's key experience themes via their place, people, landscapes and events (Table 12).

Mount Gambier and surrounds are home to the hero experiences for the Region, attracting visitors to the geological wonders including the Blue Lake, Umpherston Sinkhole, Cave Garden, Engelbrecht Caves, Valley Lake Recreation Area and nearby Mount Schank, Ewens Ponds, Piccaninnie Ponds, Kilsby Sinkhole, Little Blue Lake, Hell's Hole, Caroline Sinkhole and Ghost Mushroom Lane (seasonal). Mount Gambier is also home to South Australia's largest regional art gallery and cultural centre, The Riddoch and Main Corner Complex.

Coonawarra Wine Region is the most well known wine region, renowned for its red terra-rossa soil and Cabernet Sauvignon wines. Other wine regions include Padthaway, Wrattenbully, Mt Benson, Robe, Mount Gambier and Cape Jaffa, which combine to offer over 40 cellar doors to explore across the Region.

The historic town of **Penola** is the accommodation and dining heart of the Coonawarra, and is home to early settler heritage assets along Petticoat Lane and also home to the engaging Mary McKillop Centre, which celebrates Australia's first Saint.

Naracoorte is the agricultural hub for the Region, and is the home of South Australia's only World Heritage Listed Site – The Naracoorte Caves. Nearby Lucindale is a small rural community most well-known for hosting the annual South East Field Days.

Tantanoola Caves are a stunning small wet cave that are also wheelchair accessible. Nearby **Millicent** is a larger agricultural and forestry-based town popular with touring visitors, which has an engaging agricultural museum and regional art gallery.

Coastal Villages along the southern ports include relaxed holiday villages of Robe, Kingston SE, Beachport, Port McDonnell and Cape Jaffa, all known for their long stretch of pristine beaches, golf courses, fishing, boating, stunning coastal landscapes and access to National and Conservation Parks for four-wheel driving.

Port MacDonnell is South Australia's most southerly town. It has a rich maritime history, and is home to South Australia's Rock Lobster industry and a growing range of fishing charter experiences.

Robe is the Region's most iconic holiday village. It's a popular stop on the Melbourne to Adelaide coastal route for international visitors, and as a summer holiday destination for South Australians and Victorians. Rich in historic buildings, many and varied accommodation options and a vibrant food, produce, dining and retail mix, Robe also provides access to stunning coastal national parks, four-wheel beach driving and recreational activities.

Beachport and **Kingston SE** are loved by visitors looking for a quieter holiday town vibe from Robe.

Keith and Bordertown are major agricultural hubs and gateway to the Limestone Coast in the north. They receive strong self-drive visitor traffic from those travelling the overland route from Melbourne to Adelaide. They are both growing hubs for attracting sporting events, while Bordertown is growing its number of cultural visitors through the Walkways and Bob Hawke Gallery.

5.2 Experience Themes + Product Alignment

The Limestone Coast is known for its clean, green and pristine credentials. It's one of Australia's natural icons, home to phenomenal world renown geological landscapes, which set the foundation for a thriving primary industries sector which underpins the visitor economy in the region.

Based on stakeholder consultation, review of relevant strategic documents and visitor servicing collateral, the tourism experiences within the Region can be categorised into the five following themes:

- Wine, Beverages + Food
- Outdoor + Adventure
- Nature + Wildlife
- History + Heritage
- Arts, Culture + Retail

These experience themes appeal to a variety of visitor groups and niche interests

- **Primary Strengths** refers to key visitor experiences that are considered to be the Region's competitive advantages. Primary strengths include draw-card attractions and activities.
- **Secondary strengths** refer to tourism experiences that have a smaller presence in the sub-region but provide an important supporting role in visitors overall experience in the Region.
- **Emerging strengths** refer to tourism experiences that are limited in the Region but have the opportunity to develop over time .

Table 12 - Experience Theme Strength Summary*

*Note: Events in the Region are covered in Section 6

	City of Mount Gambier	District Council of Grant	Naracoorte Lucindale Council	Wattle Range Council	District Council of Robe	Kingston District Council	Tatiara District Council
Wine, Beverages and Food The Region is home to the Coonawarra and other wine regions including Padthaway, Wrattontully, Cape Jaffa, Mt Benson, and Mount Gambier. A growing number of food producers offer the freshest produce, including premium seafood and Waygu Beef, while there is a growing regional dining scene and farmers market experiences.	Secondary	Secondary	Secondary	Primary	Primary	Secondary	Secondary (Padthaway)
Outdoor + Adventure Recreational activities in the region range from land based activities such as walking, cycling, horse riding, bird watching, vehicle touring, 4WD and trail biking to water based pursuits such as cave diving, snorkelling, fishing, snorkelling, boating/sailing, windsurfing, diving, surfing and canoeing/kayaking.	Primary	Primary	Primary	Primary (Coast)	Primary	Primary	Secondary
Nature and Wildlife The diverse natural landscape of ancient coastline, native and farmed forests and unique geological features of volcanoes, craters, lakes, aquifers, swamps, caves and sinkholes are home to the region's most iconic attractions including the Blue Lake and the World Heritage Listed Naracoorte Caves.	Primary	Primary	Primary	Primary	Primary	Primary	Secondary
History + Heritage The region holds great significance for the traditional Aboriginal owners, the Ngarrindjeri and Boandik people. The Region also has a very rich maritime, agriculture pastoralists, Saint Mary MacKillop and Chinese gold mining treks can be experienced through historic trails, towns, walks, drives, museums, churches, cemeteries and agricultural properties.	Secondary	Primary	Primary	Primary	Primary	Primary	Secondary
Arts, Culture + Retail The Region is home to South Australia's most significant regional Art Galleries and is also home many creative people. While each of the local towns in the region offer a mix of unique retail outlets.	Primary	Secondary	Secondary	Secondary	Secondary	Secondary	Secondary

The following (Table 13) is a snapshot (not an exhaustive list) of the experience themes and examples of related product throughout the Region by their Local Government Areas as at May 2020.

Table 13 - Experience Themes + Product Alignment in the Limestone Coast Region (May 2020)

<u>LGA</u>	<u>Towns</u>	<u>Wine, Beverages + Food</u>	<u>Outdoor & Adventure</u>	<u>Nature & Wildlife</u>	<u>History & Heritage</u>	<u>Arts, Culture + Retail</u>
City of Mount Gambier	Mount Gambier	<ul style="list-style-type: none"> Herbert Vineyard Cafes, Bakeries, Pubs – various cafes, pubs and restaurants such as: Metro Bakery and Café, Presto Eatery, Commodore on the Park, Thyme at the Lakes Mount Gambier Farmers Market 	<ul style="list-style-type: none"> Engelbrecht Cave Diving + Tours Reef to Ridge Mount Gambier Tours – snorkel/cave diving Blue Lake Aquifer Tour Mount + Vine Tours Free city bikes The Railway Lands Valley Lake Precinct – Disc Golf Course Family Activities – Tenpin Bowling, Indoor Pool, Cinema, Playcafe BMX Trails Golf Disc Golf BMX Pump Track 	<ul style="list-style-type: none"> Blue Lake Umpherston Sinkhole Gardens + Possum Tour Valley Lakes Crater Lakes Walks Cave Garden Echo Farm – Behind the Scenes Tours 	<ul style="list-style-type: none"> Centenary Tower Mount Gambier Visitor Centre – HMS Lady Nelson Guides of Mount Gambier Self-guided walking tour visiting 32 heritage buildings Mount Gambier Old Court House Old Mount Gambier Gaol Rook Wall 	<ul style="list-style-type: none"> The Main Corner and Riddoch Art Gallery – Volcano the Story of Earth/Wind/Fire The Main Corner and Riddoch Art Gallery – art exhibitions held throughout the year James Morrison Academy of Music and Jazz Club Sir Robert Helpmann Theatre Home and giftware retail offerings
	Port MacDonnell Allendale East Carpenter Rocks Donovans Tarpeena	<ul style="list-style-type: none"> Wineries - Caroline Hills, Haig Vineyard, Noski Vineyard Kilsby Sinkhole Gin Tasting Lobster + fresh fish cafes/outlets – Port MacDonnells Restaurants + Cafes - The Apple Farm, The Barn Steakhouse, Bay Pizzeria, Periwinkles Pubs – Victoria, The Bellum Hotel, Tarpena Pines Hotel 	<ul style="list-style-type: none"> Kilsby Sinkhole (scuba diving and snorkel tours) Ewens Ponds - Snorkelling Piccaninnie Ponds – Snorkelling/Dive Ghost Mushroom Lane (seasonal) Allendale East Sinkhole Forage on the Coast 4WD Tracks - Carpenter Rocks to Southend 6 Fishing Charters from Port McDonnell– inc big game fishing (tuna), lobster pot pulling, marine/bird watching watching, Fishing - Boat Ramps/Jetties/Coastal Donovans Landing - fishing Burrungule Park Paintball Bird watching – Lake McIntyre Reserve, Germein Reserve Golf – Port MacDonnell Aussie Camino (walking pilgrimages) 	<ul style="list-style-type: none"> Sinkholes viewing – Hells Hole, Caroline Sinkhole (Penambol CP). Cape Northumberland Heritage + Nature Park Conservation Park Walks – Penambol CP, Telfor Scrub CP Canunda National Park – fish, camp, snorkelling, surfing, birdwatching, 4wd. Mount Shank - walk Little Blue Lake – swimming Honan Mint Trails – Forestry trail Princess Margaret Rose Caves (over border in Victoria) Lower Glenelg National Park 	<ul style="list-style-type: none"> Port MacDonnell Maritime Museum Cape Northumberland Heritage + Nature Park Donald & Sheila Feast's Classic Car Collection Port MacDonnell Historic Trail + Woolwash Interpretive Site. Saint Mary of the Cross MacKillop Pilgrimage via Port MacDonnell to Penola Dingley Dell Cottage – Adam Lindsay Gordon Home Admella Discovery Trail Glencoe National Trust Woolshed 	<ul style="list-style-type: none"> Art Gallery at the Port MacDonnell Community Complex Port MacDonnell Community Hall Mural, Bay Wave & Penguins sculptures

<u>LGA</u>	<u>Towns</u>	<u>Wine, Beverages + Food</u>	<u>Outdoor & Adventure</u>	<u>Nature & Wildlife</u>	<u>History & Heritage</u>	<u>Arts, Culture + Retail</u>
			<ul style="list-style-type: none"> • Pine Forests Reserves – walking, horse ride, cycle • Lower Glenelg National Park – kayak/canoe, walking (Nelson Canoe Hire) 			
Naracoorte Lucindale Council	Naracoorte Lucindale	<ul style="list-style-type: none"> • Frances Strawberries • Pubs, Restaurants, Cafes, Bakeries – Maddies, Kalv + Co, Sweet Espresso, Bushman Arms, Naracoorte Hotel • Naracoorte Farmers Market • Wrattontully Wine Region - 20 wine producers (no cellar doors) 	<ul style="list-style-type: none"> • Adventure Caving at Naracoorte Caves • Cave Tours, Nature Playground, Walking Trails at Naracoorte Caves • Naracoorte Regional Livestock Exchange • Birdwatching/Walking/Camping - Bool Lagoon and Hacks Lagoon • Naracoorte Swimming Lake • Golf – Naracoorte, Lucindale 	<ul style="list-style-type: none"> • Naracoorte Caves World Heritage Fossil Site • Conservation Parks – Mary Seymour, Big Heath, Fairview • Bat Tours at Naracoorte Caves (Sep-April) 	<ul style="list-style-type: none"> • The Sheep's Back Museum + Naracoorte VIC • Wonambi Fossil Centre • Lucindale Historical Society Museum • Struan House (self-guided tours) • Bourne's Bird Museum • Naracoorte Heritage Trail • Cemeteries – Hynam, Naracoorte • Hynam Woolshed 	<ul style="list-style-type: none"> • Naracoorte Regional Art Gallery • Mini Jumbuk Factory Outlet Store – woollen bedding products • Gift and Homeware retails - Naracoorte
Wattle Range Council	Millicent Beachport Coonawarra Penola Tantanoola Glencoe Nangwarry Kalangadoo	<ul style="list-style-type: none"> • Coonawarra - 25 + cellar doors, inc Zema Estate, Bowen Estate, Rymill Coonawarra • Mayura Station /Air Adventure • Food and Wine Tours - Coonawarra Discovery, Beachport Winery, Coonawarra Experiences • Restaurants - Upstairs at Hollick, Royal Oak Hotel, Pipers of Penola, • Pubs, Cafes + Bakeries • Kalangadoo Farmers Market • Kalangadoo Organic Farm (seasonal farm gate) 	<ul style="list-style-type: none"> • 4WD Tracks - Carpenter Rocks to Southend, Beachport to Robe. • Golf - Mt Burr, • Windsurfing - Lake George • Walking Trails around Beachport • Camping - Beachport Conservation Park • Fishing - Boat Ramps/Jetties/Coastal • Canoe the Drains (school groups) • Duck Hunting (seasonal) - not sure it is something they want to be promoting. • Glencoa Lakes water activities - Lake Leak/Lake Edward • Birdwatching - Beachport CP, Lake McIntyre • Southend Seaview Walking Trail • Penola Cycling Trails + bike hire • Aussie Camino • Millicent Swimming Lake 	<ul style="list-style-type: none"> • Tantanoola Caves • Bowman Scenic Drive • Pool of Siloam • Beachport Conservation Park • Canunda National Park • Kanawinka Geo Park – Mt Muirhead, Mount Burr, Lake Leake, Lake Edward 	<ul style="list-style-type: none"> • Mary MacKillop Centre Penola • Petticoat Lane Penola • Beachport Museum • Yallum Park • The Old Wool and Grain Store Museum, Beachport • Woakwine Cutting • Customs House • Millicent National Trust Museum • Woakwine Range Wind Farm Tourist Drive • Glencoe Woolshed • Nangwarry Forestry and Logging Museum 	<ul style="list-style-type: none"> • 10 + Art galleries including The Millicent Gallery, Gallery 54, Gallery @ Millicent Visitor Information Centre and Ant's Red Gum Gallery • Millicent Murals • Beachport Sculptures + Artworks

<u>LGA</u>	<u>Towns</u>	<u>Wine, Beverages + Food</u>	<u>Outdoor & Adventure</u>	<u>Nature & Wildlife</u>	<u>History & Heritage</u>	<u>Arts, Culture + Retail</u>
District Council of Robe	Robe Mount Benson	<ul style="list-style-type: none"> • Robe Farmers Market • Robe Town Brewery • Karatta Wines Tasting Room • Robe Dairy • Mahalia Coffee • Governor Robe Wines • Woodsoak Wines • Cafes + Restaurants - various • Sky Seafoods - Fresh Lobster 	<ul style="list-style-type: none"> • Tracx - MTB tours • Charlie's Surf School • Limestone Coast Helicopters • Fishing - Boat Ramp • Mountain Bike Trails – Bowers Hill • Watersports - Sailing, Canoe, Kayak, Waterskiing, surfing, Kite Surfing • Camel Milking + Riding Tours • Birdwatching • Golf - Robe • 4wd Beach Driving - Long Beach 	<ul style="list-style-type: none"> • Stunning Coast Line • Little Dip Conservation Park 	<ul style="list-style-type: none"> • Old Gaol • Customs House • Lighthouse and Obelisk • Robe Heritage Drive, Heritage Walk • The Obelisk • Many Historic Buildings + Precincts 	<ul style="list-style-type: none"> • A number of popular retail shops in Robe like Loaves & Fishes • Wilson's at Robe (Art Gallery)
Kingston District Council	Kingston SE Cape Jaffa	<ul style="list-style-type: none"> • 5 Cellar doors including Mount Benson Estate, Wangolina and Cape Jaffa Wines • Pubs, Cafes, Restaurants - Royal Mail Hotel, Bliss Kingston 	<ul style="list-style-type: none"> • Beaches- swimming, fishing, windsurfing, sailing • Golf – Kingston • Fishing - Boat Ramps/Jetties/Coastal • Cycle/Walking Trails. 	<ul style="list-style-type: none"> • Coorong National Park • The Granites • Butchers Gap Conservation Park • Mount Scott Conservation Park • Jip Jip Conservation Park • Bernouilli Conservation Park 	<ul style="list-style-type: none"> • Big Lobster • Cape Jaffa Lighthouse Museum • Kingston National Trust Museum • Historical Walk Trail around town. • Kev's Collection (Vintage Tractors) 	<ul style="list-style-type: none"> • A number of popular lifestyle retail shops • Sundial and Sculpture Park
Tatiara District Council	Bordertown Keith Padthaway Mundulla Willalooka Wolseley	<ul style="list-style-type: none"> • Pathaway Wineries - Farmers Leap, Padthaway Estate, Longbottom Vintners - olive grove and wines • Bakeries, Cafes - Henry + Rose, Ruby Tuesday, Café La Vie baristas, Keith Bakery, Bordertown Bakery and Morning Loaf Bakery. • Pubs - Willalooka Tavern, Mundulla Pub, Wolseley Hotel 	<ul style="list-style-type: none"> • Golf Courses - Padthaway, Bordertown, Keith (seasonal) • Kids Playgrounds - Don Mosley Reserve, Apex Park 	<ul style="list-style-type: none"> • Bordertown Wildlife Park - White Kangaroos • Conservation Parks - Jip Jip, Ngarkat, Harding Springs, Mount Monster, Padthaway, Mt Rescue • Poocher Swamp (wetland) • Glow Mushrooms (Padthaway Conservation Park – seasonal) 	<ul style="list-style-type: none"> • Clayton Farm Heritage Museum • Early Settlers Cottage Keith • Padthaway Homestead (currently closed) • Heritage Tourism - Soldier settlement, Bob Hawke, (developing an app) 	<ul style="list-style-type: none"> • Bordertown Walkway Gallery, including Bob Hawke Gallery • Valley View Garden • Retail - Kookaburra Lane (Mundulla), Purple Paddock (Keith), Tatiara Work Centre • Bordertown - locally made produce

5.3 Experience Development

The continued development of visitor experiences in the Limestone Coast in its strength areas (refer section 5.1) are key for driving future demand in the Region's High Yield Visitor Persona's and Niche Visitor Segments, increased distribution opportunities for the region online and via trade, and also encouraging increased length of stay and dispersal within the Region.

5.3.1 Current Projects

Following is an overview Projects currently in progress in the Region that have potential to drive demand for the Limestone Coast over the coming decade.

Naracoorte Caves Activation

Stage: In Progress

The Naracoorte Caves are South Australia's only World Heritage Listed Site and a hero attraction for not just the Region, but South Australia. Recent upgrades to the visitor experience by DEW in have seen increase positive sentiment by both visitor and locals, such as the new Nature Playground opened in 2019.

Ongoing projects supporting the visitor experience at the Caves include:

- Caves Connection Business Prospectus is part of a broader plan started in 2017 to examine a range of ideas that could better connect the Caves to the town of Naracoorte and surrounding regions. Its key objectives are to help position Naracoorte as a visitor destination, improve connection between Naracoorte Town and Caves (specifically through a Cycle Path – refer section 7.1.8), drive more demand for the caves, and uncover/promote commercial opportunities from the Caves.
- Naracoorte Trails Plan – connecting the Caves to Naracoorte, as outlined in section 7.1.8
- Australian Research Centre Research funding of \$ 2milling³⁹

Blue Lake Activation

Stage: Concept

The Blue Lake is a key driver of visitation in the Region. Whilst it receives very positive reviews from visitors during the period it is blue (November to May each year), outside of these times visitor feedback on the experience is more muted.

It is also noted by many visitors while the Lake is stunning, its only keeping them for a photo and a quick look, with some visitors walking around the Lake. The privately-run Blue Lake Aquifer Tour into the pumping station receives mostly positive review from visitors.

³⁹ <https://blogs.adelaide.edu.au/environment/2017/06/09/naracoorte-caves-front-cover-of-naracoorte-herald/>

Throughout consultation, the opportunity to further activate the Blue Lake was highlighted numerous times across the whole Region. Ideas shared by stakeholders for better activation included:

- Blue Lake Interpretation centre/museum/gallery/fine dining overlooking the lake
- Interpretive Centre/Museum/Gallery
- Food and beverage overlooking the lake
- Accommodation and function venue overlooking lake
- Zipline across Valley Lake
- A glass aerobridge, similar to the recently launched Kalbarri Skywalk in WA⁴⁰.
- Cable car
- Better parking + viewing platforms

Further activation of the Lake will encourage people to stay longer, spend more and have a more immersive experience of the Lake, and of the whole region.

Preliminary work is already underway with the City of Mount Gambier as they are in discussion with SA Water and regarding the activation of the Lake for visitor experiences, in addition to tabling initial plans to develop a Crater Lakes Masterplan in their upcoming budget for 2020/2021.

Regional Trails

Stage: Various Stages

As outlined in **Access section 7.1.8 Cycling Trails**, the expansion and connection of cycle and walking trails within the Region has long been identified as a key opportunity for LGLCA, with the investment in the Limestone Coast Regional Trails Master Plan (2014), and the Limestone Coast Regional Trail Feasibility Study (2015).

The continued funding and extension of the identified trail networks (the Coastal Trail, The Rail Trail, the The Mackillop/Woods Way (Aussie Camino Trail) are key projects to activate over the coming years. The work also supports the concept planning for Melbourne to Adelaide Cycle Trail, the 2017 election project by the new Liberal government.

Limestone Coast Mixed Dozen Trail

Stage: Funding Completed

During the implementation of the Limestone Coast Mixed Dozen Food trail, a number of new, online bookable winery and food experiences were developed for the Region. Leveraging the digital presence of the Limestone Coast Mixed Dozen Trail to further activate other Food, Wine and Beverage experiences for the Region is a key opportunity.

⁴⁰ https://www.westernaustralia.com/en/Attraction/Kalbarri_Skywalk/5d8448c95e99ee4e6987a5c6#/

Guides of Mount Gambier

Stage: Funding Completed

Guides of Mount Gambier was a project initiated in 2018 thanks to Building Better Regions Funding and matched Tourism Mount Gambier funding and overseen by City of Mount Gambier, with the aim work closely with community stakeholders to develop content, stories and fact sheets to share Mount Gambier's stories. A key component of the program the training local tour guides to better active Mount Gambier free experiences, and also support others with a niche interest launch their own tours. Results from the program saw new tours available for visitors to Mount Gambier on AirBnB experiences and also for sale via Mount Gambier Visitor Information Centre.

Opportunity exists to review and roll out the program across the Region to help other Limestone Coast towns better tell and activate their natural, heritage, arts, cultural experiences and stories.

Forestry SA

Stage: Some In Progress/Some Conceptual

The small but proactive Forestry SA team in the Limestone Coast (Green Triangle) have a number of nature based and adventure activities developed⁴¹, in progress or conceptual which will be key in growing the experience base in the Region. These projects all align with the major opportunity to grow nature based and adventure tourism in the Region. They are very willing and keen to work with relevant stakeholders go grow the activation of the Green Triangle assets in the region.

Some of their current and future plans include

- **Cave Diving.** Opening up of new sites for qualified divers, such as Snake Hill, including for adventure caving.
- **Hells Hole.** Opportunity to activate further, such as abseil down into the hole and then snorkel in the sink hole.
- **Mount Burr.** A private organisation is taking on the lease to develop new Cycle Trails
- **Lake Thomas.** Activation of camping, to support Ghost Mushrooms. Potential for commercial operators supports
- **Honan Mint Trail.** Opportunity for nature based guides to run tours.
- **Ghost Mushrooms.** While 2020 would have been their 4 season, and would have been implementing new ideas, these will carry over into 2021. Opportunities for commercial tour operators and new experiences such as photography tours. Ongoing marketing and pr support from SATC
- **Pine Forests** – development of new trails/walks
- **Native Forests** – development of new trails/walks and campsites.
- Major opportunity for **Commercial Operators** to come into Forestry SA assets to help run and activate for visitors, including Glamping, Cave Diving and Tour Guiding.
- **Camping** – they are looking to open up camping sites across their assets, to also support and like with experiences such as Cave Diving and Ghost Mushrooms
- **Events** – while their assets are being used for rallies, big opportunity to activate for events such as weddings or sporting events.

⁴¹ <https://www.forestrysa.com.au/recreation-greentriangle/>

Key opportunities to support their experience development include

- Support in marketing of their visitor experiences, including ATDW listings
- Support (financial/management) of toilets at their key sites, such as Ghost Mushrooms/Caves Sites/Camping Sites.
- Support in event activation of their sites
- Connection to Commercial Tour Operators to activate their various opportunities.
- Visitor Data collection to support the new Tourism Plan measurement strategy

5.3.2 Future Experience Development

Following is an overview of future product ideas that came out of the Stakeholder Engagement process, which aligned to the Region's High Yield Visitor Persona and Niche Interest Sectors.

Nature Based Adventure Tourism

The Limestone Coast's key visitor experiences are based around its natural assets of volcanoes, craters, lakes, aquifers, forests, swamps, caves and sinkholes. Growing the nature based adventure tourism offerings for both passionate enthusiasts and recreational users in the region are a key experience development opportunity and tap into trends as outlined of 2.1.1 of Adventure Tourism and Experience Based travel, and also strong growth in Nature based travel growth in South Australia in section 9.1.2 Potential Growth Niche Interest Travellers.

Benefits of further activation of these activates include

- Attracting further passionate enthusiasts for their specific sport through their strong word of mouth advocacy in their sporting communities.
- Broadening the outdoor and adventure offering for the Region's high yield visitors.

Caving Experiences across the Region's caves, sinkholes and caverns are globally recognised. Visitors from around the globe are visiting the region for multi-day Cave Diving Training and Diving experiences through Reef to Ridge and Cave Diving Association Australia. Snorkelling at Ewen and Picanninie Ponds and guided experiences at Kilsby Sinkhole are allowing leisure and enthusiast visitors to access the sinkhole experience. More accessible experiences for families was identified a key opportunity for this segment. Adventure Caving at Naracoorte Caves and Englebrecht Caves are also experiences already activating this space, yet under promoted.

Fishing is attracting a growing number of avid anglers, particularly big game fishing experiences via Port MacDonnell fishing charters, and boat, beach or jetty based fishing by visitor with their own fishing gear.

Windsurfing at Lake George, Beachport, has been attracting windsurfers to the Region for over 30 years.

Four Wheel Driving also has strong visitation by enthusiasts and groups, along stretches of the coast such as Canunda, Little Dip and Coorong National Parks.

Birdwatching is attracting small numbers of twitchers due to its coastal reserve, wetland habitats and strong mix bird species. Key experiences include Bool Lagoon, a Ramsar Convention Wetland of International significance. This seasonal wetland is home to a wide range of wildlife and provides essential drought refuge

for many rare and endangered bird species at certain times of the year. Port MacDonnell boat charters are also run Pelagic trip out to the continental shelf to view a wide variety of migratory seabirds.

Mountain Biking trails can be found around the Mount Gambier Crater Lake precinct and Robe's Beacon Hill, whilst Forestry SA are looking to activate MTB trails developments in sites such as Mount Burr.

Camping is a growing strength of the Region through its network of National Parks, Reserves and Forestry assets.

Great opportunities exist to attract more travellers pursuing a specific adventure activity in both short and long term through various tactics including:

- Working with existing adventure operators to better understand their customers in their adventure niche
- Engage with local community groups of the particular adventure niche for feedback on infrastructure needs.
- Advocate for maintenance/development/expansion of relevant supporting infrastructures for that niche through relevant stakeholders (eg DEW, Forestry SA, LGLGA)
- Support of existing or new operators to enter the market and connect with visitors, including hire products, lessons, tours or pop up experiences including:
 - Snorkel/Lifejacket/Wetsuit/Flipper Hire
 - Surfboard/Boogie Board/Windsurfer Hire or Lessons
 - Mountain Bike/Cycle Hire or Lessons
 - Birdwatching binoculars/maps/interpretation
 - Kayak/canoe hire
 - Campsite expansions/improvements
- Inclusion of the relevant adventure experiences in wider Regional marketing and visitor servicing activities
- Nature Based Tourism Co-Investment Fund – targeted approach to LG operators
- Partnership and advocacy marketing initiatives relevant to the specific adventure tourism sector.

Stakeholder Product Development Ideas

While Stakeholders came up with many challenges around Experience delivery in the Region (refer SWOT), following is a list of product development ideas collected during the Stakeholder Workshops, Surveys and Meetings during Feb – July 2020. Whilst this list is not exhaustive, each have potential to drive demand in the Region's High Yield Visitor Personas and Niche segments.

Table 14 – Limestone Coast Stakeholder Experience Development Ideas

Food, Beverage and Produce	<ul style="list-style-type: none"> • Expansion of Limestone Coast Wine Trails bookable food, wine and beverage experiences (including cross border with Victoria) • Activate a Wrattenbully wine bar regional cellar door • Activate crayfish experiences - museum/experience/restaurant/pot pulling experience • Improvement of the quality, consistency and provenance (locally sourced) food in restaurants • Development of food/wine beverage experiences for Groups/MICE travellers. • Activate red meat industry experiences – eg Naracoorte Sale Yard experiences • Activate the multicultural communities in the Limestone Coast food offerings
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Nature & Wildlife and Outdoor & Adventure	<p>Regional</p> <ul style="list-style-type: none"> • Upgrade the infrastructure (trails, lookouts, paths, toilets, interpretation, water based infrastructure) to improve the visitor experience at the Limestone Coasts key natural assets, including council assets national parks, conservation parks, and Forestry Reserves. Specific places mentioned • Activate the region's recreational lakes for fishing, skiing, windsurfing, camping • Expand the Region's trail riding/mountain biking/fat tyre bike trails, including pump tracks. • Address the regulations regarding activating Forestry/Parks/Coastal based tourism experiences (insurance, public vs private) • Identify and activate wildlife encounter experiences (eg Birdwatching (land and marine)) • Activate regional fishing experiences • Activate dark sky tourism opportunities • Further activate and connect cycle/walking trails throughout the Region. • Activate camping experiences • Activation of Volcanic Trail experiences (including cross border with Victoria) <p>Specific</p> <ul style="list-style-type: none"> • Further activate and expand the Glow Mushrooms experience, including in Padthaway • Further activation and infrastructure and interpretation around the Kanawinka Geo Park Volanic Trail • Further activate and revitalise Forestry SA Green Triangle assets for recreation + adventure activities (Cave Diving, Horse Riding, Walking, Mountain Biking, Camping) • Upgrade infrastructure and interpretation at key sites <ul style="list-style-type: none"> • Blue Lake • Umpherston Caves • Picannie + Ewen Ponds – more opportunities for families • Bool Lagoon infrastructure upgrades • Mount Shank walking trail upgrades • Summer schools in relevant coastal towns for relevant adventure activities (eg Surfing, Windsurfing, Snorkelling, Diving, Mountain Biking) • Further activate beginners/families cave diving and snorkelling • Further activation of Valley Lakes for recreational activities • Activate Little Blue Lake • Activation of Cave Art sites in the Region • Pristine/clean/green packages - leverage all the initiatives happening in town • Further activation of Donovan's water based activities
History + Heritage	<ul style="list-style-type: none"> • Activation of Limestone Coast Towns unique heritage stories from indigenous through to current day. • Development the Chinese Overland Goldfield Travellers stories (including cross border with Victoria) • Activation of Gold Escort Route (Golden Way) stories (including cross border with Victoria) • Support of existing volunteer run Heritage assets cross the region to better market and develop their experiences • Expansion of "Guides of Mount Gambier" throughout the region, to develop activate more guided tours / ambassadors for niche interests • Connect the Limestone Coast heritage experiences through a Heritage Trail. • Further activation of Limestone Coast National Trust assets visitor experiences
Arts, Culture + Retail	<ul style="list-style-type: none"> • Expanded Jazz experiences in Mount Gambier • Limestone Coast Cultural, Heritage and Arts Trail • Identify and activate appropriate opportunities to share indigenous experiences and storytelling • Increased public art around the Limestone Coast, such Millicent Murals, Frances Silos or illuminated art (eg see Quorn silos) • Activating empty shops in townships with artworks, murals, pop-up local creative/artist (eg Renew Adelaide) • Leverage country arts SA programs and grants

5.4 Accommodation

The Region offers various accommodation types, including motels, holiday homes, bed and breakfasts, self-contained cottages and caravan parks (as seen in Table 15). As of May 2020, there were 164 accommodation listings for the Region on the Australian Tourism Data Warehouse (ATDW).

Mount Gambier is a major accommodation hub for the Region for corporate and leisure travellers, while Robe has the largest number of motel and smaller (under 15 rooms) accommodation properties more aimed at leisure travellers. A mix of motel, caravan parks and properties of under 15 room support visitors across the rest of the region, with concentrations around Coonawarra/Penola, Naracoorte and along the coast.

The Region has a strong network of Caravan and Holiday Parks. This includes national brands of Discovery Holiday Parks (Robe) and Big 4 (Naracoorte and Mount Gambier) through to privately owned/managed/council owned parks. Penola Caravan Park was highlighted by a number of stakeholders as a key development opportunity to attract more families to the Region.

There are a growing number of self-contained RV Travellers in the Region, who are looking for low cost camping with limited facilities. Bush camping in the Region's National, Conservation Parks is also increasingly popular and a growing strength of the Region in locations such as Naracoorte Caves NP, Canunda NP, Coorong NP, Little Dip NP and Beachport CP, which online campsite bookings available via the DEW website. Forestry SA also manage a growing number of bush camping sites in the Region.

5.4.1 New and potential developments

There has been limited new major accommodation developed in the Region for a number of years, and many of the existing motel stock is looking very tired, and not meeting changing consumer preferences towards experiential accommodation.

The most recent development was The Barn in Mount Gambier, which grew its resort style property to 66 rooms from 2012 via the Tourism Development Fund. It has since built a strong reputation as a high-quality accommodation option in the Region for both corporate and leisure travellers

The proposed Nora Creina Golf Course and Tourism Resort, located in the District Council of Robe, received final development approval from the State Government in September 2019, after receiving major project status in 2014. The developers of the project have two years to begin construction which will include two 18-hole golf courses, a clubhouse, accommodation, beef farm and vineyard. The owners are now seeking significant investment for the project to proceed. SATC is monitoring the project and is working with the owners to link them with relevant investment opportunities via Department of Trade and Investment (DTTI). However, accessing this investment will likely prove challenging given the impact of COVID-19.

DEW and Forestry SA investment into the expansion of Bush Camping around the Region is planned by both government departments.

5.4.2 Travel Trade Ready Product

A key challenge for the Region identified by various stakeholders, was the limited numbers of accommodation properties who actively work with the Travel Trade distribution (and pay commission of up to 30%).

This lack of product hinders the exposure of the Limestone Coast as a destination by both domestic and international travel trade, and also gives the perception the Region isn't a bookable destination. However on the flip side, the small number of Limestone Coast businesses who are working with the trade give the region visibility in itineraries and brochures (online & published).

This is particularly challenging as it limits the ability to leverage the visitors planning travel along the Great Ocean Road through to Adelaide if there isn't varied and strong enough accommodation options for travel trade to work with. This challenge was also exacerbated when the travel trade pivoted to increase their domestic trade programs in response to Covid-19 border closures.

Table 15 – LC LGA Accommodation Overview as at May 2020

<u>Regions / LGAs</u>	<u>Hotel/Motel</u>	<u>Smaller Scale - Holiday Homes, B+B, Self-Contained</u>		<u>Caravan Parks</u>	<u>Bunkhouse + Groups</u>	<u>Camping + RV Friendly Destinations</u>
	Over 15 rooms	Under 15 rooms - Cottages, Farm Stays, Bed + Breakfasts.	AirBnB listings			National Park Camping, RV Campgrounds, Dump points.
City of Mount Gambier	<ul style="list-style-type: none"> • Motel Mount Gambier • Lakes Resort Mount Gambier • The Mount Gambier Hotel • The Henty • Tower Motor Inn • Southgate Motel • Mount View Motel • Commodore on the Park • Presidential Motel • Blue Lake Motel • Arkana Motor Inn and Terrace Apartments • Avalon Motel • Grand Central Motel • Jubilee Motor Inn • Mid City Motel • Gambier Hotel • Red Carpet Motel • Mount Gambier International 	<ul style="list-style-type: none"> • Aloha Luxury Central Accommodation • Colhurst House Bed and Breakfast • Colwyn House Bed and Breakfast • Mount Gambier Apartments • Abode Accommodation • Anzac Self Contained Accommodation • Apartments on Tolmie • Stay@Mount Gambier • Wyatt Guest House • Adela Cottage Karno House • Federal Hotel/Motel (pub accommodation) • Jens Town Hall Hotel (pub accommodation) • Mac's Hotel (pub accommodation) • Mount Gambier Hotel (pub accommodation) • Park Hotel (pub accommodation) • Over 135 Airbnb places 	135	<ul style="list-style-type: none"> • Blue Lake Holiday Park • Limestone Coast Tourist Park • Kalganyi Holiday Park • Mount Gambier Showgrounds • Mount Gambier Central Caravan Park 	<ul style="list-style-type: none"> • Mount Gambier Gaol 	<ul style="list-style-type: none"> • Frew Park RV Park and Dump Point
District Council of Grant		<ul style="list-style-type: none"> • The Barn Accommodation • Over 50 self-contained holiday rentals for 2 - 14 people Port MacDonnell • About 20 self-contained holiday house in other mainly coastal areas • The Customs House B & B • Pubs – Bellam Hotel, Victoria Hotel 	79	<ul style="list-style-type: none"> • Port MacDonnell Foreshore Tourist Park • Pine Country Caravan Park 		<ul style="list-style-type: none"> • Canunda NP (Southern end) • Tarpeena Sports Ground - free camping • Cape Norththumberland (Dump Point nearby) • Carpenter Rocks Recreation Reserve • Brown Bay Carpark
Naracoorte Lucindale Council	<ul style="list-style-type: none"> • Country Roads Motor Inn • Rest Motels Naracoorte • William MacIntosh Motor Lodge 	<ul style="list-style-type: none"> • Naracoorte Cottages (6 cottages) • Around 6 other self-contained houses and BnBs • Pubs – eg Bushmans Arms, Lucindale Hotel, Naracoorte Hotel • Ardwick Homestead Farmstay 	25	<ul style="list-style-type: none"> • Lucindale Caravan Park • Big4 Naracoorte Holiday Park • Naracoorte Holiday Park 	<ul style="list-style-type: none"> • Wirreanda Bunkhouse (Naracoorte Caves National Park) 	<ul style="list-style-type: none"> • Black Cockatoo Bush Camp • Naracoorte Caves NP • Bool Lagoon Game Reserve and Hacks Lagoon CP

		<ul style="list-style-type: none"> • The Avenue Inn 				
Wattle Range Council	<ul style="list-style-type: none"> • Chardonnay Lodge • Alexander Cameron Suites • Coonawarra Motor Lodge • Sandpipers at Millicent • Millicent Motel • Beachport Motor Inn • Somerset Motel • Bompas of Beachport 	<ul style="list-style-type: none"> • Must@Coonawarra • Menzies Retreat • Coonawarra Cabins • Around 40 self- contained or B&B accommodation • Punters Vineyard Retreat • Beachport + South End - many holiday homes, such as via www.bythesea.com.au 	107	<ul style="list-style-type: none"> • Millicent Hillview Caravan Park • Millicent Lakeside Caravan Park • Southend Caravan Park • Beachport Caravan Park • Southern Ocean Tourist Park • Southend Sands Caravan Park • Penola Caravan Park • Coonawarra Bush Holiday Park 	<ul style="list-style-type: none"> • Eagles Nest Backpackers, Penola 	<ul style="list-style-type: none"> • Millicent AH & P RV Show Grounds • Bellwether bell tents (Glamping) • Coonawarra Bush Holiday Park - bubble tents and glamping bell tents • McCorquindale Park, showgrounds (dump point) • Canunda National Park – various campsites in the park.
District Council of Robe	<ul style="list-style-type: none"> • Guichen Bay Motel • Best Western Robe Maleleuca Motel & Apartments • Lakeview Motel and Apartments • Harbour View Motel • Robe Marina Accommodation • Robe Haven Motel • The Robe Hotel • Robetown Motor Inn 	<ul style="list-style-type: none"> • Many self-contained accommodation properties are rented through Robe Holiday Rentals, Happy Shack and Robe Lifestyle 	305	<ul style="list-style-type: none"> • Sea Vu Caravan Park • Lakeside Tourist Park • Discovery Parks Robe • Robe Holiday Park 	<ul style="list-style-type: none"> • Tarooki Campsite 	<ul style="list-style-type: none"> • Little Dip Conservation Park • Wrights Bay Bush camping
Kingston District Council	<ul style="list-style-type: none"> • Kingston Lobster Motel • Lacepede Bay Motel 	<ul style="list-style-type: none"> • About 10 self-contained accommodation 	23	<ul style="list-style-type: none"> • Kingston Foreshore Caravan Park (Council) • Cape Jaffa Caravan Park 		<ul style="list-style-type: none"> • Kingston RV Park • Coorong NP – Southern Campgrounds • Maria Creek RV Park • Pinks Beach RV Park • Mount Scott Conservation Park
Tatiara District Council	<ul style="list-style-type: none"> • Bordertown Motel • Bordertown Dukes Motor Inn • Keith Motor Inn 	<ul style="list-style-type: none"> • Wolseley Hotel (pub accom) • Bordertown Hotel (pub accomm) a couple of B&B including 105 on the Park, Sadie House B&B, The Lake House Retreat 	21	<ul style="list-style-type: none"> • Padthaway Caravan Park • Bordertown Golf Club Caravan Park • Bordertown Caravan Park (Council) 		<ul style="list-style-type: none"> • Bordertown Recreation Lake • Mundulla Showgrounds

5.5 Indigenous Culture + Experiences

There is a growing expectation from communities and travellers that Australia's Indigenous history and heritage prior to white settlement is a 'must-have' as part of a complete experience in a destination.

5.5.1 South Australian Overview

Community consultation undertaken to develop the SA Heritage Tourism Strategy (facilitated in 2019) highlighted the following insights:

- Aboriginal heritage can no longer be an add-on or sit in the shadow of other histories
- Full and frank stories must be told and there should be significant effort put towards empowering and supporting Aboriginal people to establish heritage tourism enterprises

Looking to the future, successful Indigenous visitor experiences would look like the following:

- Forms a core component of the South Australian visitor experience
- Aboriginal heritage experiences are widely promoted and are profitable, delivering employment and economic outcomes for Aboriginal people.
- Aboriginal heritage and history – told by Aboriginal people, or with their direction and permission.

Key challenges highlighted:

- Cultural awareness and uncertainty about how to engage and collaborate with Aboriginal people and communities.

Key opportunities identified for South Australia include:

- Recognise that South Australian history does not begin in 1836.
- Heritage tourism can contribute to achieving reconciliation.
- Increase supply of Aboriginal heritage experiences.
- Provide opportunities for Aboriginal and non-Aboriginal people and business owners/heritage operators to work together to improve storytelling and share knowledge.
- Engagement with Aboriginal corporations and Aboriginal heritage custodians
- Provide more flexible funding programs that: - provide funding where it is needed (both places and demand) - support businesses and commercial outcomes - are sensitive to the challenges and needs of regional applicants and projects that engage with Aboriginal communities

5.5.2 Limestone Coast Overview

The Limestone Coast holds great significance to the traditional Aboriginal owners, the Boandik and Ngarrindjeri people, who have inhabited the region for more than 50,000 years.

There is a growing number of initiatives in the Region lead by local indigenous communities and corporations to preserve, revive and share culture.

- Preservation and telling of dreamtime stories⁴² through spoken word, writing and art⁴³
- Telling of early colonial indigenous stories⁴⁴ ⁴⁵
- Welcome to Country at events
- Revival of the Boandik native language Bunganditj⁴⁶
- Boandik language included in the naming of local sites⁴⁷
- National Aborigines and Islanders Day Observance Committee (NAIDOC) Week Events

City of Mount Gambier adopted its first Reconciliation Plan in early 2020, of which includes some actions that align with growing Indigenous tourism experiences in the City, such as increasing indigenous interpretation and stories on City signage.

Robe District Council are also taking proactive steps to engage with First Nation communities to explore options that will educate the wider community of the traditional ownership of the Boandik people and the respectful and culturally aware communication of their stories and history relating to Country⁴⁸.

Kingston District Council also outlined in their Community Plan 2029 actions to strengthen partnerships with the aboriginal community to tell their story through the foreshore recreational precinct development, in developing an Aboriginal Heritage trail in the town, and by installing local Ngarrindjeri language 'Meintangk' signage within the district.

5.5.3 Limestone Coast Indigenous Experiences

Mount Gambier Boandik elder, Ken Jones, runs on demand Walk on Country tours. He is also running an immersive experience “**Forge on the Coast**” at Port MacDonnell⁴⁹ that also shares some of the revived shares some Boandik language.

For the wider Region, visitors are able to learn and engage with local indigenous culture through interpretation signage at some of the Region’s natural landscapes (National Parks), historic sites, museums and art galleries and visitor collateral.

While there Region is taking many positive steps at a local community level towards reconciliation, many more opportunities exist to further expand the understanding and experience for visitors in the Region around the Boandik and Ngarrindjeri culture, languages and stories.

⁴² <https://borderwatch.com.au/new-generation-introduced-to-boandik-legends-as-dreamtime-stories-preserved/>

⁴³ <https://borderwatch.com.au/boandik-stories-shared-for-reconciliation-week/>

⁴⁴ <https://borderwatch.com.au/south-east-descendants-share-boandik-story/>

⁴⁵ <https://borderwatch.com.au/indigenous-culture-shared-through-childrens-book/>

⁴⁶ <https://www.abc.net.au/news/2016-05-19/lost-language-of-boandik-indigenous-people-revived-in-possum-fur/7429336>

⁴⁷ <https://borderwatch.com.au/boandik-elder-recognises-public-recreation-centre-nominations/>

⁴⁸ https://www.robe.sa.gov.au/_data/assets/pdf_file/0022/418504/Council-Newsletter-December-2019.pdf

⁴⁹ <https://www.airbnb.com.au/experiences/628341>

5.6 Food Producers

The Region is unique in South Australia with its year-round supply of reliable water through high rainfall, natural watercourses and groundwater. This is a key foundation for the Region's fertile soils growing reputation globally for its 'clean, green, high quality' produce including red meat, dairy, wine and horticulture.

It's rich marine environment also supports a strong fishing industry supplying the global export market. Smaller producers across the region provide quality, locally grown/produced foods for local dining venues, cellar doors, seasonal farm gates, cafes, caterers and local farmers markets.

Mayura Station is the Region's most iconic food tourism experience, and is home to one of Australia's largest full-blood Wagyu cattle herds and most awarded premium beef brands. Since opening their Tasting Room it has built a reputation as a 'must do' food experience in the region for visitors.

Being able to taste **Lobster** and experience pulling them fresh from the ocean is a key visitor experience gap in the Region, especially for the Chinese Market, highlighted by stakeholders along the coast. With most lobsters sold to the export market and very tight ownership on lobster pot licenses it can be challenging for visitors to be able to pull pots / taste / try / dine while in region. Small steps have been taken with the first ever Lobster Pot experience offered during Bay Escape Festival in January 2020, thanks to work by LCLGA. Port MacDonnell Fishing Charters is also offering pull a pot charter experiences due to holding a Victorian lobster licence.

Many of the Region's products are available seasonally via local farmers markets (Robe, Naracoorte, Mount Gambier), cellar doors, local cafes, restaurants, supermarkets, visitor centres and are also used by many accommodation and tour operators to strengthen the Region's food story.

Increasing demand and interest in understanding food provenance and the food chain is a key opportunity for the Region to extend their food experience offerings.

5.7 Tour Operators

The Region is serviced by tour operators within and also through the Region.

Within the Region, Coonawarra Experiences, Coonawarra Discovery Tours and Beachport Winery Tours offer wine focused tours, while Mount and Vine Tourism and Limestone Coast Tours offer general sightseeing tours of the Region.

Reef to Ridge offers extensive Cave Diving and Snorkelling tour options across the Region's sinkhole experiences. Umpherston Possum Tours provide a tour to visitors at Umpherston Sinkhole to view the beauty of the sinkhole as well as spotting the local wildlife. Bush Adventures is a newer operator offering beachcombing and food foraging tours along the coast at Port MacDonnell.

Many group tours run between Melbourne and Adelaide to cater for different customer segments traveling along the Great Ocean Road, such as Youth and Adventure Market and also the older senior group travel

market. Key operators include Great Ocean Road and Beyond, Wildlife Tours Australia, Expanding Horizons, AAT Kings and Sightseeing Tours Australia.

Adhoc tour operators also operate in the region, such as those looking after a dedicated client base, such as Endeavour Tours who also bring their senior groups into the Region every few years.

Most tours only include short stops in the Region to see key attractions such as the Blue Lake and Naracoorte Caves, and then a single overnight stop in Mount Gambier, Robe or Naracoorte. Many also don't spend the night in the Region, travelling from the Great Ocean Road or the Grampians to Adelaide in a single day trip.

Opportunities exist to extend group tours stays within the Region by increasing Limestone Coast itinerary inclusions.

6. Events

Events are important economic and community development drivers in the Region, as they provide an opportunity to attract and engage visitors and the community in many diverse interest areas, even-out seasonality, encourage dispersal around the Region.

Key Findings

The Region has a strong and proud history of hosting events, and today enjoys both a range of long established events, and new 'interest' based events. Events such as Generations in Jazz, South East Field Days, Fringe Mount Gambier, Southern Ports Golf, Robe Beer Fest and Coonawarra Wine events attract different visitor groups throughout the year. Community events fill the Region's Event Calendar making the Region a vibrant place to live, work and play.

Events enable the development of the Region's visitor experiences that are challenging for visitors to experience individually, such as attending a Jazz performance, sampling local produce at a Farmers Market or Lobster Pot Pulling.

The Region's strong recreational, function and sporting facilities are seeing a growing number of events hosted in the Region. Councils and communities have successfully attracted new events to their municipalities based around the Region's existing infrastructure such as the Great Victorian Bike Ride, Triple J One Night Stand, GeoVenture2020 and SA Masters Games.

While the Region already has a solid events calendar, the ability to sustain and grow existing leisure events (specifically those run by volunteers) are hindered by issues such as volunteer fatigue, lack of new volunteers to run events, increasing challenges in sourcing event funding and lack of skills by some event organisers in best practice digital marketing.

On the positive side, the development of the Mount Gambier Community and Recreation Hub and the proposed Robe Function and Event Centre is likely to enhance the appeal of the region as an events hub, and attract more leisure, sport and business events.

While there are many opportunities to grow leisure, sports and business events in the Region, the lack of a dedicated Event resource at a Regional level is a key challenge that needs to be addressed for the full value of this segment of the visitor economy to be realised.

6.1 Major Tourism Events

Following is a preliminary audit of the Regions key ongoing and once off major events as a June 2020 (Figure 25).

These are key drivers of visitation for different customer groups to different parts of the Region throughout the year. All events were cancelled/postponed from March 2020 due to the COVID-19 shutdown.

Therefore, as at June 2020 the full impact on the event calendar is yet to be realised.

Figure 25 - Limestone Coast Major Tourism Events (June 2020)

<u>LGA</u>	<u>Ongoing Events</u>	<u>Once-Off Major Events (from mid-2019)</u>
City of Mount Gambier	<ul style="list-style-type: none"> • Generations in Jazz • Mount Gambier Show • Gold Cup Racing Carnival • Australian Country BMX Championships • National Super Sedan Title • SE Country Music Festival • Fringe Mount Gambier • Mount Gambier Park Run • Mount Gambier Christmas Parade • Blue Lake Brass Band Festival • Red Hot Summer Tour • Mount Gambier Gold Cup Racing Carnival • Mount Gambier Basketball Junior SA • Basketball Championships • 100 Mile Classic Bike Race • Australian Pedal Prix • Borderline Kings Challenge • Master of MacPark Motorbike Racing • Legend of the Lakes Hillclimb • Drift Challenge Australia • Tour of the Great South Coast • Mount Gambier Disc Golf • Easter Showjumping • Harness Racing Gold Cup • Blue Lake Fun Run • Family Truck Show • Science & Engineering Challenge for Schools • Downhill Mountain Bike Races • Mount Gambier Eisteddfod • Limestone Coast Choral and Vocal Showcase • Blue Lake Carols • Touch Football Carnival • South Eastern National Highland Dancing • South East Arts Society Arts Awards • Chamber of Commerce Business Awards • New Year's Eve Festival 	<ul style="list-style-type: none"> • Great Victorian Bike Ride • Red Bull Pump Track • Mount Gambier Gift • Australian National Disc Golf • 50th Australian Indoor Bias Bowls Championships • Australian Country BMX Championships • BMX South Australian State Titles • Lions District 201C2 Conference • SA Country Basketball Development Camps
District Council of Grant	<ul style="list-style-type: none"> • Bay Escape Festival 	Great Victorian Bike Ride (Nov 19)

<u>LGA</u>	<u>Ongoing Events</u>	<u>Once-Off Major Events (from mid-2019)</u>
Naracoorte Lucindale Council	<ul style="list-style-type: none"> • Taste the Limestone Coast Festival • South East Field Days • Yakka Park Music Festival • Easter Tennis Tournament • Lucindale Camp Draft • Naracoorte Cup • Opera in the Caves • Lucindale Show • Naracoorte Swap Meet • Naracoorte Horse Trials • Naracoorte Show • Art in the Sticks • Naracoorte Lake Park Run 	JJJ One Night Stand (Sep 19)
Wattle Range Council	<ul style="list-style-type: none"> • Geltwood Craft Festival • Coonawarra Cellar Dwellers • Coonawarra After Dark • Coonawarra Cabernet Celebrations • Penola Coonawarra Arts Festival • Pines Enduro 	GeoVenture2020 (postponed) Great Victorian Bike Ride (Nov 19)
District Council of Robe	<ul style="list-style-type: none"> • Easter Surf Classic • Southern Ports Golf Week (incl. Kingston + Beachport Golf Courses) • Robe Farmers Market • Robe Beerfest 	
Kingston District Council	<ul style="list-style-type: none"> • Kingston Show • Kingston SE Foreshore Festival • Cape Jaffa Seafood and Wine Festival • Kingston SE Triathlon • Lions Surf Fishing Competition 	
Tatiara District Council	<ul style="list-style-type: none"> • Keith Diesel and Dirt Derby • Mundulla Show and Moot Yang Gunya Festival • V8 Speedboat Challenge • Tatiara Karting Club Events 	Tatiara Masters Games (postponed 2020)

6.1.1 Key Events Overview

Following is a snapshot of some of the key events in the Region, highlighting the diversity of the Region's event experience offering.

Generations in Jazz

- Generations In Jazz (GIJ) is an annual weekend jazz festival held in Mount Gambier, South Australia and major music festival for the state.
- It brings together leading jazz musicians and upcoming jazz students for three days of workshops, competition and concerts.
- It is held annually in May and brings together over 5,500 young jazz musicians from all over Australia and New Zealand.
- Directed by renowned Jazz Musician James Morrison who has runs his Jazz Academy in Mount Gambier.

- The event has grown significantly in recent years, with it receiving state government major event status in 2018.
- It attracts families and friends to watch performances across the three days.
- The event is based 10 minutes south of Mount Gambier with satellite events also held within Mount Gambier, and centres around the main performance arena, which is the largest tent in the southern hemisphere, seating up to 8,000 concert goers.
- Student groups are billeted out in accommodation in a radius of up to 1.5 hours out from the venue, providing wide economic benefit around the region.

Fringe Mount Gambier

- Annual regional off-shoot of the hugely successful Adelaide Fringe.
- The Mount Gambier Fringe Festival is a cultural event that embraces acceptance and diversity; providing the opportunity for all artists to participate, shine and be bold, and for the community to experience art that thrills, challenges and provokes curiosity – right in their own backyard.
- Fringe Mount Gambier attracts some of the best talent from Adelaide Fringe and Melbourne plus showcases local acts.
- A very diverse mix of comedy, cabaret, roving acts, live musical performance, circus performance, visual artwork, workshops, magic, mixed with great selection of food and wine from the region.
- Runs for 2 weeks in March across a diverse range of venues within Mount Gambier and District attracting people from across the Limestone Coast, Western Victoria and further afield.
- Fringe Mount Gambier launches with the Lift-Off street party on Friday in the CBD, then leads you on an adventure to Fringeland in the Cave Gardens and various venues throughout Mount Gambier and District for a week of free and ticketed events.

Mount Gambier Christmas Parade

- Annual event that has been held for over 60 years.
- Attracts over 20,000 people.
- Includes entry of around 50-60 floats including floats created by schools and community groups.
- Incorporates Brass Band Festival in parade, with entries from the region and beyond. Afternoon concert held in Sir Robert Helpmann Theatre, with competing bands playing.
- Parade concludes with a Party in the Park held at the Cave Gardens with free entertainment and activities for all.

The South East Field Days

- The South East Field Days is held annually by the Lucindale Lions Club, and attracts over 20,000 visitors from across the Region, and wider rural SA, Victorian and NSW communities for the one day even in March.
- The event has grown from humble beginnings in the Lucindale Football Oval with a small number of displays to now covering 20ha and feature more than 600 exhibitors over 45ha at Yakka Park.

Southern Ports Golf Week

- Running since 1975, Southern Ports Golf Week has been run by Robe, Kingston and Beachport Golf Clubs, offering a week of events across the three courses.
- It has a loyal following of 400 people from over 60 different clubs around Australia.
- It received very positive feedback from stakeholders that the event delivers strong economic benefit to the towns and wider region of the.

Coonawarra Wine Events

Coonawarra Vignerons and Coonawarra Wineries run a year-round calendar of events, showcasing and attracting wine lovers to the region. Key tourism events include:

- Coonawarra Cellar Dwellers – a month long activities across the wine region’s cellar doors in July.
- Coonawarra After Dark – Running for over 15 years, offering a range of unique events over 2 nights in April.
- Coonawarra Cabernet Celebrations – month long event in October, celebrating all things Cabernet Sauvignon.

Bay Escape

- One of the Limestone Coast’s longest running festivals, held every year at the end of summer at Port MacDonnell⁵⁰.
- It’s an ‘all-ages’ street party showcasing the Region’s best food, wine and produce vendors.
- 2019 saw the development the ticketed ‘Pull-a-Pot’ experience where visitors could get a look inside the professional cray fishing world and get the experience of catching a lobster. This was a collaboration with the LCLGA Tourism Industry Development Manager and is supported financially by the City of Mount Gambier and District Council of Grant.
- The Bay Escape Express ran 5 bus connections between the City of Mount Gambier and Port MacDonnell.

6.2 One-off Major Tourism Events

Stand-alone major events were identified by various stakeholders as offering major economic boosts to their local towns and regions.

Lucindale Triple J One Night Stand saw an estimated 20,000 – 25,000 people visiting the Region to attend the concert on Saturday 14th September 2019 at Lucindale’s Yakka Park event centre. The bid to host the

⁵⁰ <https://www.bayescape.com.au/>

event was driven by local Lucindale community, and supported by Naracoorte Lucindale Council. Feedback from the event was extremely positive, with many surrounding towns and communities also benefiting with concert attendee pre and post travelling around the Region.

South Australia hosted the start of the **Great Victorian Bike Ride** in November 2019, with over 4,000 cyclists, 350 volunteers and 150 support staff. Participants joined the event from around Australia as well as overseas, with ages ranging from 10 – 86. The 10-day ride started in Robe, with overnight stops at: Robe, Millicent, Mount Gambier before continuing into Victoria along the Great Ocean Road. Feedback from the Mount Gambier and Wattle Range Councils and local communities was the event was a major economic boost to their local towns and regions when these events were on.

With the COVID-19 imposed restrictions, some new events to the Region were cancelled.

The **South Australian Masters Games 2020** were due to be hosted in the region by the District Council of Tatiara for the first time since its inception in 1987. It would have attracted over **x people** to the Region over **a week-long** sporting events based in and around Keith and Bordertown **(TRC to confirm)**.

GeoVenture 2020, a geocaching event, was to be held at Millicent Showgrounds, and would have attracted over 450 participants to the region over the 4 day event in April 2020. **The event has been rescheduled to run in October 2020 (WRC to confirm)**.

6.3 Future Event Development Ideas

While Stakeholders came up with many challenges around Event delivery in the Region (refer SWOT), following is a list of new event and event activation ideas collected during the Stakeholder Workshops, Surveys and Meetings during Feb – July 2020. Whilst this list is not exhaustive, each have potential to drive demand in the Region's High Yield Visitor Personas and Niche segments.

- Activate Saturday night accommodation during the field days, get them to stay the night and spend time as visitors on Sunday
- Amateur film festival - activate youth
- Big professional sporting event - BBL, AFL, NBL
- Develop a Regional Events Calendar - less duplication or clash of events
- Events for families
- Jazz year round events
- Music festivals of all ages
- Niche events - fill gaps for key niches
- Sports events/championships base around regional rec centre
- Winter based events/activities
- World Heritage Run to become an annual event

6.4 Event, Sport and Function Venues

The Region is home to various event, sporting and function facilities. Many stakeholders and towns highlighted group events, often based around sports groups or niche interest groups as key visitor groups to their towns and part of the Region.

A preliminary audit of the Region's Event, Sport and Function Spaces was undertaken in June 2020 (Table 16).

Table 16 – Limestone Coast Event, Sport and Function Venue Overview (as at June 2020)

<u>Regions / LGAs</u>	<u>Conference + Event Spaces (over 100 seats)</u>	<u>Sport + Recreation Facilities</u>
City of Mount Gambier	<ul style="list-style-type: none"> • The Riddoch & Main Corner Complex • Lakes Resort Mount Gambier • Commodore on the Park • The Presidential • Community and Recreation Centre (in development) set to seat up to 1500 people • Sir Robert Helpmann Theatre • Mount Gambier City Hall • Lakes Resort Mount Gambier • The Old Mount Gambier Gaol • The Presidential Motel • Southgate Motel • International Motel • City Band Hall • Casadio Park Complex 	<ul style="list-style-type: none"> • Community and Recreation Centre (in development) with multiple all weather aquatic and court facilities • Borderline Speedway • Blue Lakes Sports Park • Mount Gambier Show Grounds • Mount Gambier Golf Club • South Eastern Automobile Club • Mount Gambier Blue Lake Golf Links • Blue Lake and Valley Lake precinct • The Icehouse Basketball Stadium • McNamara Park • Glenburnie Racecourse • Hastings Cunningham Reserve • Mount Gambier & District RSL Bowling Club • Treehouse Adventure Centre
District Council of Grant	<ul style="list-style-type: none"> • The Apple Farm • The Barn 	<ul style="list-style-type: none"> • Port MacDonnell Community Complex • Port MacDonnell Golf Course • Tarpeena Skate Park
Naracoorte Lucindale Council	<ul style="list-style-type: none"> • The Chapel Studio • Yakka Park - Lucindale Event Centre • Lucindale Country Club • Lucindale War Memorial Hall 	<ul style="list-style-type: none"> • Naracoorte Show Grounds • Lucindale Country Club • Naracoorte Golf Club • Naracoorte Racing Club • Naracoorte Swimming Lake
Wattle Range Council	<ul style="list-style-type: none"> • Chardonnay Lodge • Katnook Estate • Wynns Coonawarra Estate • Mayura Station? • Hollicks 	<ul style="list-style-type: none"> • Greenrise Recreational Reserve Penola • Lake McIntyre Millicent • McCorquindale Park Penola (Showgrounds) • Millicent Mega Playground • Millicent Skate Park • Millicent Swimming Lake • Penola Golf Course • Penola Skate Park
District Council of Robe	<ul style="list-style-type: none"> • Tarooki Conference Centre • Robe Yacht Club • Robe Institute 	<ul style="list-style-type: none"> • Robe Function and Event Centre (proposed) • Off Road driving • Robe Golf Club • Robe Yacht Club
Kingston District Council	<ul style="list-style-type: none"> • Kingston District Hall 	<ul style="list-style-type: none"> • Apex Park & Skate Park • Kingston Golf Club • Kingston Flying Club

Tatiara District Council	<ul style="list-style-type: none"> • Bordertown Civic Centre - Cinema + Conference Facilities 	<ul style="list-style-type: none"> • Apex Park Padthaway • Bordertown Recreation Lake • Bordertown Golf Course • Bordertown Gun Club • Bordertown Kart Club • Bordertown Tennis Complex • Bordertown Basketball Stadium • Keith Golf Course • Keith Hockey Club • Keith War Memorial Sports Centre • Mundulla Arena • Mundulla Show Grounds • Tolmer Park Bordertown
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Outdoor Event Venues

DEW, Forestry SA and Local Councils also manage many outdoor assets that can be further activated for events that drive visitation from the Region's high yield and niche interest and niche market travellers. These assets include:

- Caves – eg Naracoorte, Tantanoola
- Sinkholes – eg Umpherston
- Forests – Pine + Natural
- Reserves
- Parks
- Coastal Foreshores – eg Robe, Beachport, Kinston SE, Port MacDonnell

Opportunities to audit available outdoor/nature based spaces and activate them for specific events such as Leisure/Community Events, Concerts, Weddings and Sporting Events.

6.5 Event Infrastructure Projects

6.5.1 City of Mount Gambier Community and Recreation Hub

This new facility will be a major asset to the Region for attracting Sporting Events, performances and business events. Key facilities will include⁵¹

- Six regulation size, multi-purpose courts for ball sports such as netball, basketball, indoor soccer, volleyball. Courts can also be used for badminton, carpet bowls and a range of other recreation and fitness purposes.
- The courts can also be used for other purposes such as a venue for large conferences/events/performances accommodating more than 1000 people, including breakout areas and smaller conference/meeting rooms. Versatile space with a stage for live performances, retractable seating, efficient acoustics, projection and IT facilities.
- Aquatics including a learn to swim pool, children's water splash/play area, 25 metre pool and a warm water pool. All facilities will be to regulation size with disability access.
- Conference facilities able to cater for up to 1,500 people with commercial kitchen
- The current 50 metre pool (and grass surrounds) will be retained along with its heating and mechanical services for summer use, with easy access to the proposed facility.
- The exterior features include increased car parking, undercover drop off areas and paved and landscaped entrance.
- Booking enquiries and tentative bookings for conferences and events are already building for the opening in 2022.

The project is currently in tender process to engage a developer and has been pushed back in priority due to the COVID-19 economic impacts⁵².

6.5.2 Robe Function and Event Centre

- A feasibility study is currently being developed by the Flinders University to look at potential locations for the Centre in Robe.
- The employment of a new Tourism and Events Manager for the Council is key new resource for both RDC and also wider Events in the Region.

⁵¹ <https://www.mountgambier.sa.gov.au/news/community-and-recreation-hub-planning-progresses>

⁵² <https://borderwatch.com.au/community-group-to-provide-insight-on-recreation-hub/>

6.6 Corporate and Business Events – Meetings, Incentives, Conventions, Exhibition (MICE)

Business Events are a key opportunity for the Region to grow the visitor economy.

To activate this segment, LCLGA has been active members of Adelaide Convention Bureau (ACB) since 2018.

Key activities LCLGA has leveraged to grow this market segment include:

- Attended Destination SA Showcase, showcasing LCLGA MICE venues and experiences to MICE buyers
- Webinars to train MICE staff from around Australia and Asia Pacific
- Training of ACB staff on the Region's MICE venues and experiences
- Support information ACB leads and bookings for events to the region
- Development of the "Limestone Coast Business Events Brochure", showcasing both motivational and information informational for MICE Planners at ACB events and opportunities.
- Industry collaboration (Section 8)

At a Local Government level councils are also working to activate this sector. The development of the Mount Gambier Community and Recreation Hub by 2022, the ability to host events of varying sizes, including large events of up to 1500 people, will be realised. Enquiries and bookings are already being taken for events from 2022, making the City an attractive and viable option to hold large scale conferences and events.

Robe Council has a strong priority for the growth in Events in the town through the development of a new Function and Event Centre for the town. A feasibility study for the proposed conference centre will commence in early 2020 with the support of Flinders University and Council will share the report with the community and discuss the viability of this opportunity for Robe.

6.7 Sporting Events

The Region has wide variety of sport and recreational facilities (as seen in Table 16), and is able to support a wide variety of sporting codes. This is evident with the planned hosting of the SA Masters Games in District Council of Tatiara in early 2020.

The Region's natural landscapes, coastal infrastructure, national parks, trails, golf courses, forests and roads support a wide variety of recreational based sporting events, as seen in the Great Victorian Bike Ride and GeoVenture 2020.

Opportunities identified specific to growing sports tourism into the region include:

- Activating existing community sporting facilities and clubs in the Region to attract new events
- Consideration by the Region's Councils in their sporting/recreation facilities capital works programs to assist with attracting relevant sporting events based on their facilities. For example, ensuring sports facilities were able to offer both male and female change rooms, night-lighting to allow night event and upgrading facilities are at a state (and national) competition levels (eg. turf pitches at cricket ovals).

- Investment into new sporting facilities where identified community gaps exist, that can also be used for attracting sporting events to the Region.
- Membership based clubs (eg. Yacht/Sailing/Golf) – encouraging reciprocal membership rights to attract travellers to use their facilities and run event that attract members from intra/interstate clubs. Southern Ports Golf Weeks is a key example of this opportunity.
- The Mount Gambier Community and Recreation Hub has bookings anticipated and the indoor facility will bring more all-weather events to the region.

The Region also has a number of smaller scale sporting events that bring sports tourism to the region including Basketball, BMX and an emerging trend around Mountain Bike & Fat Tyre.

The LCLGA in partnership with the Office of Recreation & Sport hosts 2 regional sporting programs

- Star Club Field Officer who works closely to support numerous clubs and organisations across the region to ensure good governance, strategic planning, infrastructure and funding.
- Limestone Coast Regional Sporting Academy provides aspiring young athletes that have demonstrated sporting talent and physical abilities the chance to access elite localised training and development programs and coaches from the region.

While these programs support our social fabric in the region, they have scope to be scaled up to proactively attract sporting events and clinics that yield well.

6.8 Resourcing Events

Leisure and sporting events across the Region are run through a mix of council, paid staff or volunteers.

Councils also have varying levels of investment in Events. Most councils have a competitive Events Budget, which events managers can apply for, some councils have dedicated staff and budgets to plan and run events, while others are part-time resourcing (refer [section 7.4.1](#)). All councils have capital works programs for the continual investment/upgrade of their municipalities Sport/Recreational facilities.

At a local Government level, collaboration on Events includes

- The Limestone Coast Region and Western Victoria have formed a Cross Border Event Network collaboration amongst Councils and Shires, 3 visits per year.
- City of Mount Gambier have been invited to collaborate with Adelaide in their Local Government Events Network forums via Webinars
- Both these networking forums have been vital with information sharing, especially during covid-19 preparations for events that would continue through the pandemic.
- Discussions have taken place with equipment/resource sharing, how councils deal with excess rubbish at events to make events more environmentally friendly, tracking economic benefits to our councils, risk assessments and safety plans, etc.
- Discussions also on events that are held in within multiple councils and working collaboratively together.

The LCLGA Tourism Industry Development Manager has been the key driver of growing Business Events in the Region, and supports cross regional event collaboration for major events, such as JJJ One Night Stand.

- The Limestone Coast region and Western Victoria have formed a Cross Border Event Network collaboration amongst Councils and Shires, 3 visits per year. City of Mount Gambier have been invited to collaborate with Adelaide in their Local Government Events Network forums via Webinars
- Both these networking forums have been vital with information sharing, especially during covid-19 preparations for events that would continue through the pandemic.
- Discussions have taken place with equipment/resource sharing, how councils deal with excess rubbish at events to make events more environmental friendly, tracking economic benefits to our councils, risk assessments and safety plans, etc.
- Discussions also on events that are held in within multiple councils and working collaboratively together, such as Tour of the Great South Coast and Great Victorian Bike Ride.

It was highlighted through consultation on several occasions that most events are working in isolation or only at a Council/Town level. There is also no intra-regional collaboration on event calendars to look at the planning of events to attract/retain visitors on a wider regional level at different times of the year.

Significant issues around event resourcing were identified by different stakeholders across the Region:

- **Post COVID-19 sustainability** of existing events, and challenges relating to future unknown management of large group gatherings and event attendee health and safety.
- **Volunteer fatigue and succession planning** – Fatigue by volunteers in planning and managing key events, with younger community members not showing an interest in taking over from long serving volunteer event committees.
- **Event funding and regulation** – Insurance costs + regulations, operational costs, and the ability to secure funding for events is putting events at risk of no longer being able to run, such as France Folk Festival, which wound up after 20 years in 2019⁵³. It's likely this challenge will be compounded post COVID-19.
- **Event manager skills** – Particularly with volunteer run events, event managers highlighted the challenge in having the skills to understand how to best attract visitors to their events through digital channels.

There is a significant opportunity for the Region to enhance the communication, consultation and collaboration in the event space to coordinate and leverage existing event resources (Council/Private Sector), address the identified event resourcing issues, and grow the significant opportunities for Region across Leisure, Business and Sport Events.

This opportunity will require a dedicated resource to drive the implementation of a strategic event strategy for the Region.

⁵³ <https://www.naracoorteherald.com.au/story/6489438/frances-folk-gathering-is-no-more/>

7. Access + Infrastructure

Key Findings

The Region is a major self-drive destination, which means the **Road** network needs to be maintained to a high standard to allow visitors to safely and easily explore the Region. Some roads have already been identified as in need of upgrades, such as the Princess Highway between the southern ports.

Mount Gambier Regional Airport is the key air access point for the Region for corporate travellers and the MICE sector. Regional Express has a regular schedule connecting the Region to Adelaide and Melbourne. Lack of major carrier connectivity (including overseas), high excess luggage costs and high airfare costs were highlighted as key challenges. Sustainable COVID-19 flight schedules recovery and the District Council of Grant's Airport Masterplan + Expansion are key opportunities in the short term, while attracting a second carrier could be a longer opportunity subject to major growth in demand.

Aerodromes at Robe, Millicent, Coonawarra and Naracoorte provide opportunities to attract more charter visitors to the region.

Intra-regionally, access challenges identified include the lack of taxis in the Coonawarra, lack of public transport outside of Mount Gambier (specifically for events) and lack of connecting Coach Services in Mount Gambier for the Worker/Youth Segment from Melbourne to Adelaide.

Cycle/walking trails are a key priority for Councils. The Limestone Coast Regional Trail Feasibility Study outlines 3 intra-regional trails for the Region and lays the foundation for stakeholder collaboration and application of grant funding to allow the rolling out of the trail network across the Region.

The Region's visitor experience extends well beyond the traditional tourism operators, with **signage, parking, public convenience, bins, RV traveller infrastructure** (dump points/water/overnight stops) and **Electric Vehicle** charging Points, needing to meet visitor needs and expectations. Path infrastructure, signage and toilets at key natural attractions were identified as in need of repair/maintenance/upgrade, such as Bool Lagoon and Mount Shank. Ease of parking/regular rubbish removal/toilet cleanliness during summer season/key events in towns such as Robe can also be a challenge.

Wayfinding, directional, interpretative, tourism (brown), interpretive and highway direction **signage** and **information bays** were highlighted by multiple stakeholders as key considerations for improving visitor experience, satisfaction, dispersal and length of stay within the Region.

Coastal Erosion is impacting visitor assets of boat ramps (Kingston SE), jetties (Kingston SE), marinas (Cape Jaffa) and attractions (Robe Obelisk). Maintaining the erosion issue is reportedly placing a huge burden on Council budgets.

Broadband and Wifi blackspots in the Region are impacting the ability for visitors in being able to plan, book and advocate for the Region when travelling around, and also hinders local businesses ability to connect to customers.

Improving visitor infrastructure and access lies with multiple stakeholders including Councils, DEW, Regional Development and Community Groups. The **RDALC Infrastructure Audit** is a key piece of work to support funding of key visitor economy impacting projects of visitor blackspot roads, digital connectivity blackspot and maintenance of coastal assets.

Resourcing relating to industry collaboration and communication is a key opportunity that will support collaboration of the various relevant stakeholders to address the key challenges for their part of the Region or remit.

7.1 Access

How visitors travel to and around the Region is a key factor to consider when planning to grow the visitor economy. The Region is typically a self-drive destination, but potential exists to improve visitor access infrastructure at a State and Local Government level, in addition to leveraging key access points to increase visitation.

7.1.1 Roads

Roads are the key connectors that allow visitors to explore the Region, connect tourism attractions and towns and allow visitors to safely travel around.

The Region has multiple road entry points, however the most direct access from Adelaide is via the inland route along the Dukes Highway to Keith and Bordertown. This is the main transport route from Adelaide to Melbourne. The Riddoch Highway then transverses the region north to south from Keith to Mount Gambier, and transverses key experiences and locations of Padthaway, Naracoorte, Coonawarra and Penola.

Alternative entry to the region from Adelaide is along the coastal route of the Princess Highway along the Coorong to Kingston which then travels inland to Mount Gambier, before continuing into Victoria. The Southern Ports Highway connects coastal villages between Kingston SE and Millicent, including Cape Jaffa, Robe and Beachport.

RDALC Infrastructure Audit highlights key Road Priority upgrades including the Princess Highway Kingston to Millicent. While stakeholders shared feedback some Roads in the Region were unsafe, such as Keith to Mount Gambier due to lack of passing lanes.

7.1.2 Mount Gambier Airport

The Mount Gambier Regional Airport is a major gateway to the Limestone Coast and Western Victoria and is owned and operated by the District Council of Grant. It is the only commercial airport servicing the region and is located 10 minutes from the city of Mount Gambier on the Riddoch Highway. It offers hire cars via Avis, Budget, Hertz & Thrifty, and also has a taxi service for airline passengers. City of Mount Gambier maintains a brochure rack at the airport to provide brochures and maps for visitor arrivals.

Pre-COVID-19, Regional Express Airlines (REX) is the only airline servicing the airport, with multiple daily flights to Adelaide and Melbourne, with both am and pm departures from both destinations. Airline passengers travelling on the route are mainly local resident and corporate travellers. During COVID-19 flight capacity fell dramatically, however is rebuilding slowly.

The airport also has a strong general aviation community, with a number of local aircraft based at the Airport. The airport also regularly receives visits from a range of private, charter, commercial and defence aircraft.

Gambi Air Flying School provides opportunities for flying training for the region's residents, which has seen good growth flight training and planes at the airport in recent years.

Regional Express Partnership

In October 2018, Council entered into a historic 5-year partnership deal to stabilise the Airport's rocky relationship with Regional Express. The Partnership runs through until 30 June 2023 and includes:

- Community Fares (Rex Promo) rolled out by Rex on 25% of seats on both Melbourne and Adelaide booked a minimum 30 days prior and last-minute purchases within 24 hours before departure time on any unsold seats.
- Reduction of the Mount Gambier airport head tax by \$2.20 by Council, of which Rex is matching this with a further \$2.20 reduction of all fares.
- Commitment by Rex to prioritise additional services to the Mount Gambier to Adelaide route once Rex has been able to rebuild pilot numbers.
- Feedback on the first 9 months of the Community Fare is it has been a success, with an increase in passengers flying into and out of the Limestone Coast.

Airport Arrivals

As at June 2019, the airport saw 81,781 passengers pass through their gates, an increase on 1.5 % on the previous 12 months. Arrivals have grown at similar rate since 2015. However, the peak of passenger movements was as high as 114,888 in 2007 prior to local airline O'Connor Airlines ceasing to operate.

Airport Upgrades

The Mount Gambier Airport Masterplan 2016 – 2025 outlines a number of projects and insights which are relevant to growing the region's visitor economy.

The current Federal, State and Local Government funded \$9.2m Mount Gambier Regional Airport Upgrade is due for completion by December 2020. It includes a number of the projects identified in the Masterplan including 120 metre runway extension, heavy aircraft parking area, luggage area and a covered passenger drop-off zone.

Benefits of the Upgrade include the ability to cater for larger aircraft and also improve the visitor experience for visitors to the Airport.

LCLGA Tourism Industry Development Manager sits on the Mount Gambier Regional Airport Strategic Committee and looking at opportunities to activate the Airport's visitor arrival experience.

Future Airline Growth

In 2009 and 2014 Qantaslink considered offering services to Mount Gambier as part of their Australian flight network reviews, with no services eventuating. Sustainability of two airlines to retain profitable load factors on both Adelaide and Melbourne Mount Gambier routes would be questionable, unless there is major growth in demand for the Region. A number of stakeholders identified the attraction of Qantas to the Region as a key opportunity.

However, the challenge of REX and Qantas competing on smaller regional airline routes is highlighted with REX's announcement of their withdrawal from Kangaroo Island after 30 years due to reducing load factors since Qantaslink entered the route. The COVID-19 travel shutdown has further highlighted the vulnerability of having two airlines on the route.

A key opportunity for the plan in the short term is to build sustainability of the existing carrier on the route as post COVID-19 travel returns to pre-COVID-19 levels, before looking to pursue a second carrier into the airport.

7.1.3 Aerodromes

The Region also features aerodromes at Naracoorte, Robe and Millicent. Naracoorte and Robe are council owned and managed, while Millicent is privately owned. These small airfields service a small number of visitors arriving into the region via private charter flights. A Tiger Moth is based at Robe Aerodrome offering joy flights over the town and region. There is also the potential for joy flights from Mount Gambier airport as this is often an avenue of enquiry from visitors to Mount Gambier.

Naracoorte Lucindale Council has new updates planned for Naracoorte Aerodrome, with updates to electricity supply and a taxiway extension survey and design work completed. While numbers of current arrivals are already servicing a small number of visiting tour charter visitors, opportunities exist to grow the number of air tour arrivals to the region.

Coonawarra also has its own airstrip, which is available for private flights. In more recent years it has been used for activities such as the annual Tasting Australia event and wine buyer visits. The airstrip is managed by Coonawarra Vignerons on behalf of Wattle Range Council. Challenges identified in stakeholders is the Airstrip doesn't have required navigation equipment to allow landing of planes in all weather conditions, which has seen cancellation of key flights in recent years.

7.1.4 Hire Car

Hire Cars are available in the region from Mount Gambier Airport (Avis, Budget, Hertz, Thrifty) and Naracoorte (Avis).

7.1.5 Public Transport + Taxis

Within the region, public transport is only available in Mount Gambier, which has public bus loops around the city.

Taxi services operate in Mount Gambier, which services the city surrounding towns and Mount Gambier Airport.

The lack of taxis and public transport was also highlighted as a challenge in the Coonawarra Wine Region and Robe, for guests wanting to dine out restaurants and cellar doors and leave their cars at their accommodation.

Uber for the towns of Robe and Coonawarra/Penola was highlighted as opportunities by the local communities.

7.1.6 Coach

Commercial coach services to the region from Melbourne and Adelaide are major transporters of backpacker and working holiday visa makers to the Region.

Premier Stateliner Coach services connects the Limestone Coast with Adelaide⁵⁴. It runs 6 day a week service via the inland route of Keith, Bordertown, Padthaway, Naracoorte to Mount Gambier. A 3 days a week service connects Adelaide and Mount Gambier via the coastal towns of Beachport, Robe and Kingston SE.

VLine services connects Mount Gambier with Melbourne⁵⁵ via 7 day a week coach service which connects in with VLine Trains at either Geelong or Ballarat, however these services are not often used by leisure visitors.

During some major events charter coaches provide connection to certain towns, such as Bay Escapes (Mount Gambier to Port McDonnell) or Coonawarra wine events (Naracoorte/Mount Gambier to Coonawarra/Penola). This was highlighted as a challenge particularly by stakeholders in the Coonawarra region.

Another key challenge identified during stakeholder engagement was the lack of timetable connection between the VLine and Premier Stateliner services, meaning connecting travellers are required to stay overnight in Mount Gambier for any onward travel. The lack of coach services within the Region, particularly during events, was also highlighted as a challenge for the region.

7.1.7 Rail

Overland Train

The Overland train service, operated by Journeys Beyond, travels through the north of the Region, allowing passengers to join or embark the Melbourne to Adelaide/Adelaide to Melbourne services in Bordertown. The service is mainly used by local Limestone Coast residents for travel to/from both cities.

The future sustainability of the Overland has been uncertain in recent years with the SA Government announced the pulling of funding. Councils along the line are currently lobbying the continued support by both Victorian and SA Government's to continue to fund the service post Covid-19 shutdown⁵⁶.

Opportunities existing to advocate for its continued service at a State Government, and overland or off-Train packages in the Region with Journeys Beyond.

Limestone Coast Rail Study

Regional Development Australia Limestone Coast will be undertaking an economic benefit study on re-establishing rail in the region.

The study will be based on the advantages of reinstating rail from Heywood (Victoria) to Wolseley. It will assess the full route and the viability of segments, such as Mount Gambier to Heywood with an intermodal on the Eastern outskirts of Mount Gambier.

Opportunities existing to identify any visitor economy benefits through the activation of this Rail link.

⁵⁴ <https://stateliner.com.au/wp-content/uploads/southeast-290419.pdf>

⁵⁵ [https://www.vline.com.au/getattachment/95418c32-d2fa-48d6-9985-cae575623c45/Mt-Gambier-\(1\)](https://www.vline.com.au/getattachment/95418c32-d2fa-48d6-9985-cae575623c45/Mt-Gambier-(1))

⁵⁶ <https://www.abc.net.au/news/2020-06-19/summit-to-keep-adelaide-to-melbourne-overland-train-on-track/12372922>

7.1.8 Cycle Trails

Connectivity to and within the region by cycle is also a way travellers can access and move around the Region.

As shown in Visitor Experiences Section 5, the Region is home to a number of town-based cycle trails connecting towns with local attractions, such as around Mount Gambier Valley Lakes, Penola, Naracoorte, while secondary road-based trails existing in some areas connecting attractions, such as Penola's Shiraz Trail.

Regional Trails Project

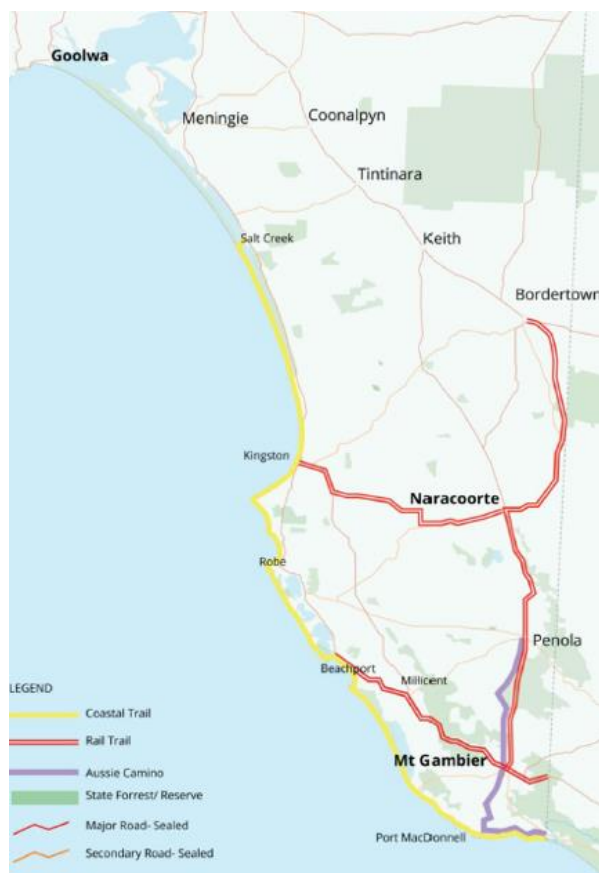
Trails are a high priority for many of the Councils in the region as a way attract visitors to their towns. The expansion and connection of trails within the Region has long been identified as a key opportunity for LGLCA, with the investment in the **Limestone Coast Regional Trails Master Plan (2014)**, and the **Limestone Coast Regional Trail Feasibility Study (2015)**.

Three trails are the key focus of the Regional Trails Project:

- **The Coastal Trail** runs along the coast, as much as practical, from the SA/VIC border to the Coorong where it links to the proposed Murraylands Trail. The Coastal Trail combines with the Mackillop / Woods Way (Aussie Camino Trail) along the section from the border to Port MacDonnell.
- **The Rail Trail** utilises disused rail corridors and is divided into three sections. It travels from Mount Gambier to Bordertown in one section, the SA/VIC border through Mount Gambier and to Beachport in another, and also from Naracoorte to Kingston in the most northerly section.
- **The Mackillop/Woods Way (Aussie Camino Trail)** recognises the travels and work of Saint Mary Mackillop and Father Julian Tenison Woods. It runs from Portland, Victoria to Penola. This study focuses on the section from the border to Penola which in part combines with sections of the Coastal Trail from the border to Port MacDonnell and the Rail Trail from Mount Gambier to Penola. The Aussie Camino Trail is already being used by groups and self-guided walkers throughout the year.⁵⁷

Figure 26 - Limestone Coast Regional Trails Network (Proposed)

⁵⁷ <http://www.aussiecamino.org/wordpress/>



Councils acknowledge the important of the Regional Trails Network in their strategic plans as future infrastructure projects for their municipalities. Smaller sections of the Network are under active development by some Councils including:

- **Naracoorte to Naracoorte Caves Bike Trail.** NLC aims to develop a cycling and walking trail from Naracoorte Town to the Caves which is part of the Rail Trail network outlined in the Feasibility Study. The Trail is currently on hold due to grant funding not being received.
- **Penola to Coonawarra Rail Trail.** As outlined in their current Strategic Plan, WRC are currently pursuing funding opportunities with the aim of constructing a walking/cycling trail within the rail corridor between Penola and Coonawarra⁵⁸.
- **Mount Gambier to Port MacDonnell.** DCG noted in their stakeholder engagement for this plan the wish to have the Trail that connects Mount Gambier with Mount Shank and further along to Port MacDonnell. This forms part of the Aussie Camino Trail. No work has been undertaken on this Trail since the Regional Trails Feasibility.

Melbourne to Adelaide Cycle Trail

During 2017, a key election promise of the new Liberal Government was to investigate a Melbourne to Adelaide Cycle trail. The existing work undertaken by the LCLGA with the Regional Trails Project has been provided to SATC for inclusion in the project scoping of this new trail.

⁵⁸ https://www.wattlerange.sa.gov.au/_data/assets/pdf_file/0013/300253/WRC-Strat-Plan-2018-2021-L-Res.pdf

Mountain Bike Trails

The City of Mount Gambier has a solid network of Mountain Biking Trails around the Valley Crater Lakes. Robe District Council also has development Mountain Bike Trail network near town. Forestry SA also have recently approved private development of Mountain Biking Trails at Mt Burr.

7.2 Infrastructure

As with all destinations, the visitor experience extends well beyond the traditional tourism operators, into the realm of the community, so initiatives have also been identified in the Plan for Councils to ensure key access and infrastructure signage, parking, public convenience, bins, water access and connectivity are maintained to a standard which meets visitor needs and expectations.

7.2.1 Mobile Network Coverage + Community WIFI

Mobile Network Coverage and WIFI is critical infrastructure for visitors to access destination information when in region and provide allow them to provide of experiences, events and towns.

There are significant areas within the middle and north of the Region where mobile network coverage is limited. Broadband is also limited around Keith and Robe. These blackspots challenges are highlighted as top priority in RDALC Infrastructure Audit and Priority Project Analysis (2019)⁵⁹, with a key action to develop a business case to address these blackspots.

Free WIFI was rolled out by SA Tourism Commission for visitors early 2018 for visitors in Beachport, Kingston SE, Naracoorte Caves, Penola, Port MacDonnell and Robe. Councils in the Region also highlight the provision of WIFI in key locations outside of council services (eg. Wattle Range Council has rolled out public WIFI in Penola and Millicent) and the City of Mount Gambier has also rolled out free public Wi-Fi at key locations such as Blue Lake, Umpherston Sinkhole, Englebrecht Cave and Cave Gardens).

7.2.2 Signage

Signage plays an informant role for visitors, allowing them find, navigate and learn about experiences in the Region. During stakeholder consultation, signage and wayfinding was indicated as a challenge across the Region, particularly as different stakeholders are responsible for different signs across the Region.

Tourism signs for the Region are as follows:

- Interpretive Signs – Deliver interpretation of key visitor assets in locations, such as Towns and National Parks, Heritage Trails (various including Councils, National Trust, DEW, Forestry SA)
- Tourism Signs (brown signs) – Directs visitors to a specific Tourism Businesses (Council)
- Town Welcome Signs – Names and welcomes visitors to a town (Council/Community Groups)
- Tourism Trail Signs – Directs visitors around a drive trail (Council/Community Groups)
- Wayfinding Signs – to public toilets, RV Dump points, points of interest (lookouts) etc. (Council/DEW)

⁵⁹ <https://www.rdalc.org.au/wp-content/uploads/2019/12/RDALC-Infrastructure-Audit-and-Priority-Project-Analysis-Report.pdf>

- Highway Directional Signs – Signs that highlight Tourism Regions and Towns at major road intersections/junctions (eg. Keith, Bordertown). (DPTI Responsible)
- Digital Signage/Maps – Optimisation of online maps and directional signage (Visitor Centres/Councils/Operators via Google Maps)

Many of the Councils in the Region have existing or proposed Signage and Wayfinding Strategies, such as District Council of Grant⁶⁰ and Robe District Council⁶¹. The City of Mount Gambier have also commenced work on refreshing signs at key tourism related locations such as new entrance banners and interpretive and wayfinding signs in and around the Blue Lake and Valley Lakes precinct. Opportunities have been identified to help further address challenges of signage to, from and within the Region.

7.2.3 Information Bays

Information bays provide a welcome point to towns and key natural attractions of the Region, provide some local interpretation and deliver offline visitor servicing to people travelling around the region. Information Bays are managed at local level by Council or local community groups.

A key opportunity is auditing the information bays, and then ensuring consistency of application of regional visual identity, experiences and storytelling.

7.2.4 Public Amenities + Recreational Vehicle Dump Points

Councils and DEW are responsible for the provision and maintenance of rubbish bins, public toilets and some public RV dump points in the Region, which are important services for visitors.

During the stakeholder engagement, the following opportunities were identified:

- Public Toilets - Stakeholders identified the importance providing clear wayfinding signage to public toilets, maintaining them to a very clean standard and a working order. Opportunities also exist to activate toilet blocks through public art⁶²
- RV Dump Points - Stakeholders identified the provision of dump points for RV Travellers in the Region are important.
- Rubbish Bins - Stakeholders identified the importance of providing regular rubbish removal at high traffic visitor spots, such as near public toilets and at Council or DEW run RV Campgrounds.

7.2.5 Parking

Car, RV, Cycle and Caravan parking options for visitors in town centres and key visitor experiences are a key consideration and can impact a visitor's experience in a destination.

Peak times of the years over summer holidays and during larger events can cause parking congestion, such as in Robe, which impacts both local communities and also the visitor experience in a destination. Ease of

⁶⁰ https://www.dccgrant.sa.gov.au/_data/assets/pdf_file/0029/394328/Annual-Report-2018-2019.pdf - Page 43

⁶¹ https://www.robe.sa.gov.au/_data/assets/pdf_file/0022/418504/Council-Newsletter-December-2019.pdf

⁶² <https://www.portlincolntimes.com.au/story/5465789/toilet-block-earns-distinction/>

parking for towing and RV travellers also needs to be considered in towns and visitor attractions across the Region.

Stakeholders highlighted parking in certain coastal National Parks was also a challenge, such as around the entrance to Canunda National Park at Southend.

7.2.6 RV Camping

As outlined in Accommodation Section 5.4, many of the communities around the Region provide facilities for self-contained travellers on community land, such as reserves, showgrounds and ovals.

Councils play an important role in providing and maintain the infrastructure for local town communities to provide adequate facilities of power, toilets, dump points (if relevant) and water for these travellers, especially where market gaps exist.

A challenge for Councils in operating these facilities is to ensure any expansion of RV Camping in their municipalities has a full business case analysis and undertakes robust stakeholder engagement. This is to limit the cannibalisation of business from private operators, such as the proposed expansion of camping sites at Mount Gambier Showground⁶³.

The City of Mount Gambier has recently been granted RV Friendly status and a dump park has been installed at Frew Park.

Kingston District Council has recently developed a dedicated RV Park on the town's foreshore, which is receiving very positive reviews from visitors⁶⁴, and encouraging overnight stays in the town from visitors who otherwise wouldn't have stayed. This was possible due to the Council's recent purchase of the local Caravan Park.

Stakeholder outlined the continued support of provision and maintenance of RV Camping facilities by council was important activities to attract visitors to their part of the Region where market gaps exist. The community of Kalangadoo particularly highlighted their wish to activate old Railway lands for RV travellers.

7.2.7 Jetties, Wharves and Boat Ramps

The Limestone Coast has a wide number of boating assets that enable the Region's fishing and water sports activities for both locals and visitors.

It was noted via Stakeholder Engagement that coastal erosion is impacting many of the Region's coastal assets, such as Cape Jaffa Marina and Kingstone Boat Ramp. The state of these facilities is negatively impacting flow of visitors to those regional communities and causing major budget impacts for local government to maintain.

⁶³ https://www.adelaidenow.com.au/subscribe/news/1/?sourceCode=AAWEB_WRE170_a_GGL&dest=https%3A%2F%2Fwww.adelaidenow.com.au%2Fmessenger%2Fmount-gambiers-pine-country-holiday-park-owner-appeals-council-decision-to-allow-22-campsites-at-towns-showgrounds%2Fnews-story%2F450ff954ada9cfba991f67b60ff9f642&memtype=anonymous&mode=premium

⁶⁴ [https://www.google.com/search?tbm=icl&ei=oO_iXqJgsl_j4Q-eua_YBA&q=Kingston+RV+Park&oq=Kingston+RV+Park&gs_l=psy-ab..8.8.1529...0i273k1i0i67k1i0i433k1i0i131k1i0i433i273k1i0i433i67k1i0i131i67k1i0i131i273k1.0.KK_OBQnEUNw#rfti=hd::si:17733233366152540392;mv:\[/-36.8270626268096,139.85077924616752\],\[-36.82742257731903,139.8503295538325\]\]](https://www.google.com/search?tbm=icl&ei=oO_iXqJgsl_j4Q-eua_YBA&q=Kingston+RV+Park&oq=Kingston+RV+Park&gs_l=psy-ab..8.8.1529...0i273k1i0i67k1i0i433k1i0i131k1i0i433i273k1i0i433i67k1i0i131i67k1i0i131i273k1.0.KK_OBQnEUNw#rfti=hd::si:17733233366152540392;mv:[/-36.8270626268096,139.85077924616752],[-36.82742257731903,139.8503295538325]])

RDALC Infrastructure Audit 2019⁶⁵ highlighted the importance of these assets to the Region. Advocacy for funding to support the repair and upkeep of these key visitor infrastructure at a state and federal level is a key opportunity.

7.2.8 Electric Vehicle Charging Stations

Stakeholders identified the growth in Electric Vehicle (EV) Charging Stations around the region, particularly Rapid Charing, were a key opportunity. The City of Mount Gambier have installed three Tesla Charge Points at various locations within the City – Commodore on the Park, Comfort Inn (use is at cost to the user), and Lakes Resort (for use by guests only). At the Coonawarra stakeholder workshop, it was identified that EV travellers to the Region were high value visitors, who are very happy spend, particularly at the Region's cellar doors.

⁶⁵ <https://www.rdalc.org.au/wp-content/uploads/2019/12/RDALC-Infrastructure-Audit-and-Priority-Project-Analysis-Report.pdf>

8. Industry Engagement + Collaboration

Fostering a collaborative industry is required to facilitate a growth of a regional visitor economy. Ensuring all stakeholders understand and respect the remit and priorities for each entity is crucial to success.

Key Findings

LCLGA have actively been supporting the tourism industry through facilitating and sharing industry development opportunities through regular communications.

Through consultation, it was highlighted that the industry still struggles with workforce development and labour shortages and gaps, which will need to be addressed to support the Industry to deliver the exceptional experiences to drive visitor advocacy.

LCLGA have also worked with numerous industry sectors over the recent years to encourage and facilitate collaborative projects and opportunities.

Unfortunately though, there still is are two major challenges that are hindering a truly collaborative culture in the Region, including the general lack of understanding of the value of the visitor economy across the whole community, and parochialism, which if not harnessed, could cripple any attempt at growing the visitor economy in the future.

It will take strong leadership and a strategic industry engagement and development plan to involve the whole community in the visitor economy. Without this, realising the potential for the Limestone Coast as a must visit destination will most likely be hampered.

8.1 Industry Communications

Even though the industry operates in a silo manner, a key focus for the Manager is to maintain open lines of communication and timely information sharing with the tourism operators and industry groups within the Region.

In March 2018, a monthly industry e-newsletter was designed and distributed by the Manager, with 271 qualified operators, and an open rate of 118, shares or forwards 98, links clicks 57. This enews provides information on ATDW, Workshops, Events, Tourism Tips, marketing news and opportunities, plus funding programs and showcasing new tourism businesses to encourage cross-promotion.

Given time restraints, the Manger had to adapt the format for sharing information within industry in 2019 to a less formal approach of forwarding relevant information as it was made available via email.

In March 2020, the Manager set up a Limestone Coast Industry Networking Facebook Group as a response to engaging with industry over the COVID-19 pandemic, and an informal meeting has been had to table the

idea of establishing a whole of region tourism group. Engagement from operators within this group has been positive, with 248 members subscribed to the group.

Whilst LCLGA have activated the above communications, consultation with stakeholders identified a lack of a consistent, effective region wide communication. Therefore, the key opportunity to develop and execute a strategic, multi-channel communication and engagement plan with all visitor economy stakeholders.

8.2 Industry Development

8.2.1 Business Capacity Building

Industry development opportunities have been pursued by the Manager on an adhoc and opportunistic basis.

- LCLGA supported other training organisations to conduct training in region like the Limestone Coast Collaborative during their program to build a regional brand. Some of this training centred around digital capability, business branding and value chain development.
- LCLGA funded ATDW training blitz in July 2017 with over 80 operators attending and supported On-line webinars for the wine sector.
- Since 2017, TiCSA actively facilitated marketing and experience development workshops throughout South Australia, with 4 being facilitated in the Limestone Coast Region. 112 number of operators attended these workshops.
- In 2019, the SATC also facilitated workshops relating to digital marketing (specifically optimisation of ATDW listings and social media) with 32 number of operators attending these sessions.
- Additionally, as part of the Limestone Coast Wine Trails Mixed Dozen Project, wine tourism operators participating in the project had the opportunity to attend digital marketing training to upskill in optimising their ATDW listings too.

The manager also promoted education opportunities for tourism operators provided by other Training Organisations as they were made available.

Whilst LCLGA and other stakeholders have implemented or promoted several training opportunities for the region over the recent past, industry consultation identified that the industry feel there is not enough business development opportunities, specifically in the areas of trade marketing, experience development and marketing.

Opportunities exist for the region to plan and implement a strategic capacity building schedule for the region, focussing on areas of greatest need, which could be derived from an ongoing industry sentiment survey.

8.2.2 Skills and Workforce Development

Skills

Consultation with stakeholders identified the following opportunities with regard to the development of skills in the region:

- Develop skilled resources to support event managers/committees
- Skill development for various hospitality (barista, chefs, service) and business management needs

Undertaking an audit of the skills shortages across the region will help to identify the skills training required in the region, followed by a strategic implementation plan for the rollout of relevant training opportunities.

Workforce

Consultation also highlighted that there are challenges around attracting the required talent, and the labour to facilitate the visitor economy. Specifically, there is a major gap in the support and recruitment of Volunteers, especially when it comes event management (ref 6.7), tour guiding and visitor servicing (ref section 10), and also being able to attract and sustain / retain the employment of skilled professionals for long periods of time.

Opportunities to address these challenges include:

- Improve shoulder season business prospects through effective marketing to improve employment sustainability for seasonal businesses
- Better activate the youth in the visitor economy (via school curriculum, VET courses, University Courses in Mount Gambier, volunteering at events)
- Attract more qualified, skilled professionals to relocate to the region
- Address labour shortage by employing long term visitors (tourers)
- Develop a volunteer strategy to support current and recruit new volunteers

8.3 Industry Collaboration

Since 2010 (and the termination of Limestone Coast Tourism Inc.), the responsibility for industry engagement and collaboration resides with the LCLGA Tourism Industry Development Manager (the Manager).

As noted in section 11.10, there are currently 24 industry bodies that are actively pursuing activities to grow tourism in their remit, and mostly doing it without consultation with other groups in the region.

This has presented numerous challenges for the Manager, particularly as it relates to being able to effectively communicate and collaborate from a regional perspective. As a result, the approach to industry communications, development and collaboration has been organic and opportunistic, rather than planned and structured.

8.3.1 Collaborative Projects

LCLGA have worked with numerous industry sectors on collaborative opportunities, including tourism operators, the Councils and their visitor servicing teams, the South Australian Tourism Commission, tourism related industry sectors (wine, food etc).

Since 2018, the LCLGA TIDM has initiated several cooperative projects for the industry, including:

- Groups Planner / Coaches proactive pitching

- Business Events brochure and attending trade events on behalf of the industry a& region
- Various trade brochures designed individually for key inbound markets and attending trade events on behalf of the region and industry
- Facilitated and supported training and workshops for industry

Anecdotally, the engagement from industry with these projects has been positive when approached. We have highly subsidised industry through the above work really only requesting nominal fees to participate and LCLGA wearing the bulk of the investment and carrying the risk.

Obviously this type of collaboration requires time and persistence and has probably room for improvement but given conflicting priorities it has not reached its potential.

Fostering a collaborative industry is required to facilitate a growth of a regional visitor economy. Ensuring all stakeholders understand and respect the remit and priorities for each entity is crucial to success.

Throughout consultation it was highlighted that there is a breakdown in effective collaboration on two levels within the region.

Firstly, at a more strategic level, whilst the Councils in the region contribute to LCLGA as funding partners of the peak body for tourism in the region, there are still opportunities for increased communication and collaboration on visitor economy initiatives outside of this commitment.

For example, one of the key projects that requires a collaborative approach in the region is Visitor Servicing, and currently each Council are operating their visitor servicing in isolation from each other. A collaborative approach to this project could potentially see efficiencies created in capital and human resourcing with an improved servicing outcome for the visitors throughout their travel purchase journey.

Secondly, community parochialism throughout the region presents a challenge to achieve quality collaboration at a tourism operator level. This type of parochialism impacts the ability to energise locals to advocate for the whole region to friends and family; hinders the formation of relationships between operators to develop packages; limits the activation of cooperative marketing and projects.

Effective and positive collaboration needs to start from the top, which can filter down to the Region's communities. Developing a strategic industry engagement strategy is a major opportunity for the region, which will identify mechanisms to ensure the Industry is working toward a common goal, businesses feel supported and as a result perform better, and all stakeholders are informed in an efficient and effective way.

Other opportunities identified through consultation include;

- Working collaboratively with other sectors of the economy, including Agriculture, Real Estate, Viticulture etc
- Working with neighbouring regions collaboratively on projects, advocacy issues, marketing activations

8.4 Resourcing Industry Engagement and Collaboration

It was highlighted through consultation on several occasions that there is a lack of coordinated communication, consultation and collaboration between the wider industry and the LCLGA, with

stakeholders also noting that the LCLGA Tourism Industry Development Manager was ‘doing a really great job considering the workload that is required’ for the Region.

There is a significant opportunity for the Region to enhance the communication, consultation and collaboration to develop a united and informed industry. However, this will require a dedicated resource to drive the implementation of a strategic industry communication and collaboration strategy for the Region.

9. Brand and Marketing

This section identifies the current brand and positioning for the Limestone Coast Tourism Region. It also highlights the current destination marketing initiatives implemented by tourism stakeholders.

Key Findings

Visitor Personas - The Limestone Coast currently does not have formal visitor personas developed for the destination. This is a critical piece of marketing infrastructure as it sets the foundation for all branding and marketing initiatives.

Branding - The Region have recently (2016) collaborated on the development of a brand project to reflect the Region's personality and promise. The new brand was launched into industry with a short video to communicate the brand proposition more broadly. This was followed up with the dissemination of the strategy and implementation guidelines through the various sector groups and associations.

There has been minimal uptake of the use of the brand by industry to date (May 2020)

Regional Marketing Strategy + Resourcing - There is currently no collaborative marketing strategy which encompasses the whole tourism Region since 2010. The Region's tourism stakeholders implement marketing initiatives individually, with slight content nuances directed at slightly different visitor segments.

Whilst there are active whole of region marketing assets, there is no dedicated, official resource to drive consumer marketing initiatives. Not having a dedicated resource impacts the quality and consistency of strategic brand implementation to achieve cut-through and subsequent demand from the identified high yielding visitor personas.

Additionally, analysis of digital metrics indicate a lack of engagement and conversion of the key digital marketing platforms for the region, which presents a major opportunities of activating a whole of region marketing strategy, with a laser focus on telling the right story on the right platform, by the right storyteller at the right time.

And, whilst each organisation are undertaking some regional marketing, no organisation has a strategic marketing plan in place, which means return on investment and marketing impact cannot be effectively measured. It also means the resourcing that goes into the implementation of initiatives is not accounted for.

Visitor Advocacy - It was evident through desktop research there is a distinct lack of content and visitor reviews for the Region and its experiences online (via search, social media and review websites). In saying this, the advocacy that exists is positive, there is just not enough of it.

Given that visitor advocacy is the most trusted and influential form of destination marketing, great opportunity exists to educate industry on best practice digital marketing to drive more advocacy for the Region online.

Industry and Stakeholder Perception – There is a strong perception across the region that there is not enough investment in regional marketing activities, both investment both from within the region, and also from the South Australian Tourism Commission.

9.1 Visitor Personas

9.1.1 Current Visitor Personas

Currently, the region has not formally articulated Visitor Personas whom represent the Region's most valuable prospects.

However, the recently implemented Limestone Coast Mixed Dozen Interactive Trails Project undertook research into the Region's 'Most likely international wine tourist', which highlights the behaviours, traits and travel dispositions of a visitor persona specifically for the food and wine tourism niche interest segment.⁶⁶

9.1.2 Potential Growth Markets

This section provides an overview of market segmentation for the Region; reviewing important current visitor markets, and potential growth markets for the Region. Information for this section has been drawn from background research and analysis, as well as industry consultation (see Acknowledgements)

Geographic

Locals

During consultation it was identified that the Region has a strong local market, with whom live and holiday within the Limestone Coast region. Specifically, inland families tend to holiday at the beachside townships of Robe, Beachport and Kingston.

This market will continue to be an important cohort to leverage in the future, given the ability for this market to act quickly. It will be a great market to leverage for tourism events, however, it will also tend to be a short lead time and reactive market and will require a targeted communications strategy.

Therefore, the key opportunities for activating a strong local market could include:

- Advocating for a sustainable, long term Shop / Explore Local campaign
- Local Advocacy Campaign – encourage locals to explore the region with VFR (eg. Bendigo Ambassadors Program⁶⁷)

Intrastate

⁶⁶ Mixed Dozen Research Outcomes Report June 2019,

⁶⁷ Bendigo Ambassador Pass > <https://www.bendigoregion.com.au/explore-bendigo/bendigo-ambassador-pass>

As at YE September 2019, South Australia experienced great growth from the Interstate market, with a 21% increase in visitors and nights from this market, which is well above the national growth rate of 13% and 12% respectively)⁶⁸.

Visitors from Adelaide and regional South Australia will continue to be an important market for the Region, with the objective of not only increasing this market share but converting more intrastate daytrip visitors into overnight visitors.

Industry consultation highlighted that all towns within the region are already attracting a proportion of intrastate 'group travel' visitors, from a variety of niche interest (car clubs, probus etc) and market segments (business, sport, general interest). Therefore, leveraging these networks, and identifying new opportunities within these segments presents great opportunity for the region, given that these groups already find the region desirable for their group travel needs.

Other key opportunities to activating the intrastate market could include:

- Marketing a series of itineraries for relevant on relevant digital platforms to strategically position the region as a multi-night destination for high yielding visitor personas (to be identified in the new plan)
- Educating and leveraging the South Australian Visitor Information Centre Network who have a track record of increasing length of stay across regional South Australia.

Interstate

South Australia saw a 16% increase in overnight visitor numbers by YE September 2019, and a 22% increase in nights from the same segment in the same timeframe (with growth rates are higher than the national average of 10% and 11% respectively).⁶⁹

The Limestone Coast is the most visited Region in South Australia for interstate visitors (outside of All of Regional SA and Adelaide), with approximately 10% of total interstate visitors to South Australia visiting the Limestone Coast.⁷⁰

Victoria is the Region's most attractive interstate market, already attracting 17% of all Victorian visitors to South Australia. The majority of visitors from Victoria will also self-drive (57%) and stay 4-7 nights (36%), which are also good indicators for the Region.⁷¹ The hard border closures between Victoria and South Australia due to COVID-19 however, is currently restricting the Victorian market, which is anecdotally impacting the economy in the Limestone Coast greatly.

Tasmanians also like to visit the Limestone Coast, with 14% of all visitors from Tasmania visiting the Limestone Coast. This market is particularly interested in visiting friends and relatives, sightseeing and going to the beach, which are all experiences that the Limestone Coast can offer. The majority of this segment will fly into SA (80%) and will stay 8-14 nights (36%).⁷²

⁶⁸ SATC South Australian Visitor Economy Snapshot YE September 2019

⁶⁹ SATC South Australian Visitor Economy Snapshot YE September 2019

⁷⁰ SATC Domestic Visitor Profiles YE September 2019

⁷¹ SATC Domestic Visitor Profile, Victoria, YE September 2019 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={970ACD77-A90A-42A9-A4F7-43BF1216BBD5}&B=False>

⁷² SATC Domestic Visitor Profile, Tasmania, YE September 2019 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={698A01CF-6BB1-4B85-A4BA-A161E8F7692F}&B=False>

The state growth, along with positive forecast growth for domestic overnight visitors to the state (see Figure 23) offers a significant opportunity for the Region to target more visitors from current interstate source markets where destination awareness and current visitation statistics are positive (NSW/QLD).

There will be opportunity to leverage interstate visitors visiting neighbouring regions targeting daytrip and/or overnight stays, specific opportunities include:

- Working collaboratively with the Great Southern Touring Route marketing program (specifically, a touring Map) could enhance demand from interstate visitors who are wanting to extend their trip into South Australia.
- Leveraging the marketing investment of the Limestone Coast Wine Trails project (extend the digital platform) to target the domestic food and wine niche interest segment.
- Collaborating with neighbouring regions on relevant and specific programs that support the key experience themes of the Region (eg. Volcanic, Wine/Food, Nature, Aboriginal Culture, History)

Given the inbound travel restrictions to Australia (as at June 2020), it would also be advantageous to connect with Australian travel agents who are redesigning high end itineraries for high yielding Australian travellers looking to travel in Australia (instead of their usual international itineraries) in the next 18-24 months.

Also, advocating for increased exposure of the Region and leveraging working collaboratively with SATC and strategically positioning the Region through effective marketing to key niche interest and market segments will be the key to driving increased visitation from this market.

International

Whilst international visitors currently comprise a small proportion of overall visitors to the Region (7%), positively trending growth and forecasted positive growth of this market at a state level⁷³, an impressive average length of stay and spend per visitor (Figure 27)

According to SATC, the region is established in New Zealand and UK/Northern EU, but is still developing or emerging in other markets (Eastern markets, including China).⁷⁴

Industry consultation highlighted that most international visitors indicate that they are traveling through the Limestone Coast region from the Great Ocean Road on their way to Kangaroo Island or the Barossa.

Recent bushfires (December 2019/January 2020) and the continually evolving Coronavirus (COVID-19) outbreak pose the biggest threats to driving international visitation in the short term, with reports that many international visitors are cancelling or delaying their holidays to Australia until the threat of COVID-19 has significantly reduced (which is currently an unknown).

Whilst these threats exist, the Region will still need to actively invest in activities to engage this market to ensure the Region is front of mind when consumer confidence rises again, as when it does, it is likely to rebound fast⁷⁵.

It's important to note that working with the international trade system is a long term proposition, and whilst the region has been focussing efforts in this space in the last 10 years, some of the key opportunities identified to pursue this market include:

⁷³ Tourism Research Australia, International Visitor Survey, YE 2018

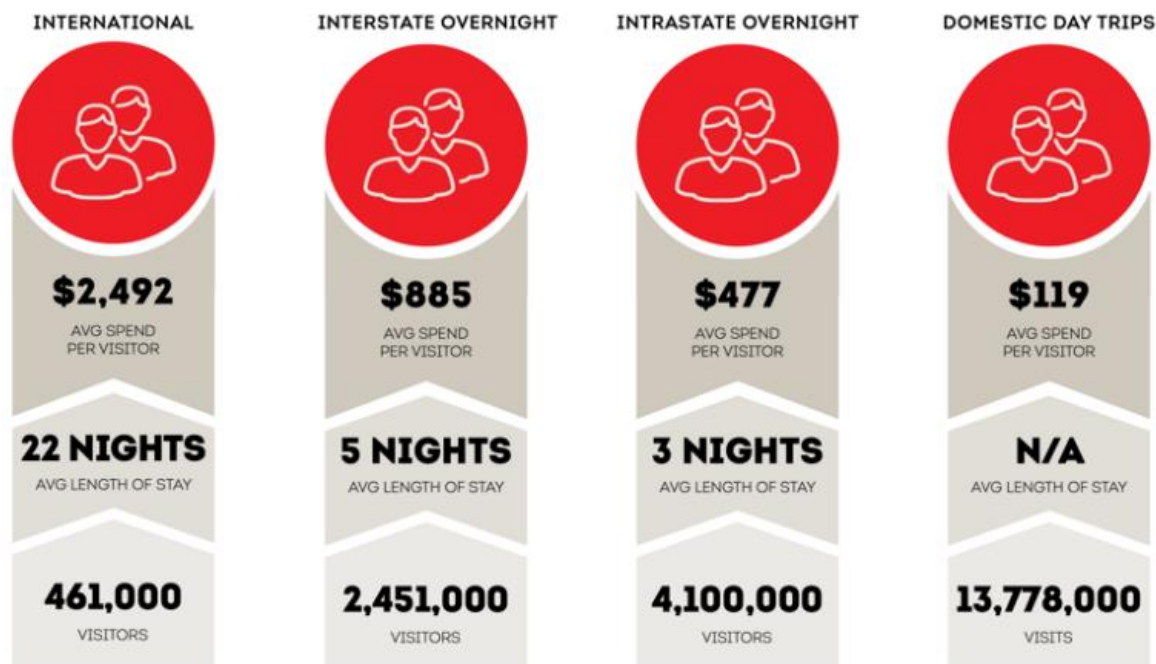
⁷⁴ Information provided by SATC Destination Development team, April 2020

⁷⁵ Tourism Minister Simon Birmingham address at Destination Australia Conference, Thursday 12th March 2020

- Capitalising on the recently implemented 'Limestone Coast Mixed Dozen Interactive Trails Project' (details of this project are available in section 9.4.1) by continuing to invest in the sustainability of the messaging and digital assets.
- Implement a targeted approach to working with each geographic market by intimately understanding the nuances between the awareness and travel behaviours of each individual market (for example, it will be important to not group the Asian markets, as the motivations and journey map for Chinese and Singaporeans are very different).
- Industry consultation also highlighted that opportunities exist in elevating brand awareness of the region with international students via tertiary education organisations (eg. Education Adelaide, Universities), to capture international VFR visitors.

– there is a limestone coast version of this info-graphic – attached on email – NEED TO GET THIS AGAIN, CANT FIND IT

Figure 27 - Differences in Visitor Behaviour by Origin September 2018



Data Source: South Australian Tourism Plan 2030 (originally from Tourism Research Australia (IVS/NVS Sept 2018))

China

In YE December 2018, China was the largest inbound market for visitor arrivals, and the largest market for total spend and visitor nights, contributing \$11.5 billion to the Nation's economy (12% growth from previous year).⁷⁶

The Free and Independent (FIT) China traveller is fast becoming a boom market for Australia and key regions, with the market potential to be worth up to \$13 billion by 2020.⁷⁷

The China market has grown rapidly to become South Australia's second largest inbound source market and the largest of all Asian markets. The China visitor market remains an attractive proposition for South

⁷⁶ Tourism Australia China Market Profile YE December 2018 > <https://www.tourism.australia.com/en/markets-and-stats/market-regions/greater-china/china.html>

⁷⁷ Tourism Australia China Market Profile 2016

Australian and is currently flagged as one of the South Australia's highest yielding inbound market spending approximately \$7895 per trip⁷⁸.

Travel periods are generally short in duration with the majority of nights spent in capital cities. South Australia generally attracts affluent middle-class couples and families residing in the first-tier cities of Shanghai, Beijing, Guangzhou and Shenzhen. These experienced overseas visitors travel independently or in customised small group tours and seek immersive experiences. South Australia is positioned as a destination that offers Australia's best wine and dining experiences, coupled with nature and wildlife, and coastal and aquatic experiences.⁷⁹

China has been earmarked as South Australia's number 1 inbound market, with ongoing strong growth of 28% per year since 2005⁸⁰

Research indicates though that penetration of this market for regional areas in Australia is limited, as the High Value Chinese Tourist has a focus on travelling to the capital cities and larger regional destinations as a priority.⁸¹

To date, the LCLGA have not invested significant resources in pursuing this particular inbound segment, rather focussing on the inbound markets which the region and experiences within have established relations/awareness.

The approach in pursuing this particular inbound market will need to form part of an overall trade marketing strategy, and will need to be considered in broader context in terms of the region's experience profile, the impacts of COVID-19, and the potential to attract this market based on their travel behaviours.

Keeping China on the radar is important for the long-term visitor economy, with the following opportunities for the Region over the next 5 years:

- Maintain and update the 'Treasure Trails' collateral and distribute at relevant touch points for the China visitor.⁸²
- Develop new/enhance current experiences and itineraries that leverage the region's key experience themes (food, wine, agri, eco/nature, history, aboriginal culture).
- Leverage /buy into relevant projects and programs initiated by Tourism Australia, SATC (and other Government agencies) and neighbouring regions (eg. Great Ocean Road, Southern Grampians) where relevant.

India

India is one of the world's fastest growing outbound travel markets, with the United Nations World Tourism Organisation predicting 50 million outbound travellers by 2020. While these numbers are staggering, the bulk of this travel is to neighbouring countries.

⁷⁸ South Australian Tourism Commission – Activating China 2020

⁷⁹ SATC International Market Profile – China YE December 2018 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={6D5E41EE-65A5-47F5-BF2F-962093A39F84}&B=False>

⁸⁰ SATC Presentation to Regions, China Strategy 2025

⁸¹ Tourism Australia – High Value Traveller Fact Sheet 2020, China

⁸² LCLGA Treasure Trails > <http://www.lclga.sa.gov.au/~lclga/strategic-activities/sustainable-economy/regional-tourism>

Realising this potential growth, South Australia needs to become more active with the Australian market now holding four per cent share of the Indian medium to long haul travel market.

Top insights from SATC's India 2020 Strategy⁸³:

- One of the fastest growing outbound markets, and in absolute numbers travelling worldwide second only to China.
- Huge growth in our target market of the affluent middle class and High Net Worth Individuals.
- The Indian Leisure Tourist market is still only small but growing quickly. Both South Australia and Australia are experiencing strong growth, and are projected to grow robustly for the foreseeable future.
- South Australia currently has no direct air access to India.
- Indian visitation to South Australia is strong for Visiting Friends and Relatives purpose visitors and education, however below the state average for holiday purpose visitors.

Given its potential, and the fact that the Limestone Coast has the highest percentage of international visitors (in comparison to other regions in SA, it will be important to leverage opportunities to drive demand from this market, especially the VFR market.

The Naracoorte Caves Connection Business Prospectus also outlines India as a key inbound market for the caves experience (see section 5.3)

Generational

When talking about generational growth markets, it's important to note that differences between each cohort are blurring. People travel for different aspirations and interests, regardless of their age and gender. Therefore, the Region must focus on attracting customers with similar aspiration and interests, and not just define customers their age.

In saying this, there are differences between age groups which need to be fully understood, especially as it relates to how the different cohorts plan, book and seek out information whilst in destinations, also their differencing needs as it relates to accessibility.

Baby Boomers

Research suggests that targeting Baby Boomers (aged 56-76 in 2020) is very much a lucrative opportunity for the Region, for the following reasons:

- They have more time available than any other demographic cohort
- Their average household net wealth is currently the highest of any generational segment⁸⁴
- 40% of Australian travellers 55+ plan to spend between \$10k – \$50K per person per annum on travel.⁸⁵
- The market size is growing, from 15% of total Australian population in 2017, to approximately 20% in 2037⁸⁶

⁸³ SATC India 2020 Strategy > <https://tourism.sa.gov.au/research/strategies/india-2020>

⁸⁴ <https://mccrindle.com.au/insights/blog/australias-generations-wealth-income/>

⁸⁵ <https://www.newyoungconsulting.com/seniors-travel-research-report/>

⁸⁶ <https://www.newyoungconsulting.com/seniors-travel-research-report/>

However, whilst they say that budget is not a primary factor, they:

- Look for the lowest price and looking for a deal / special promotion are key considerations.
- Allocate most to flight and hotel, rather than experiences.⁸⁷

In terms of what experiences, they are interested in, they:

- Are the most destination decisive of the generations with 67% saying they had already decided on a destination when beginning to shop for travel.
- Prefer all-inclusive vacations like resorts and cruises, and taking a nap on the beach, spa treatments and all-day relaxation.
- Prefer activities like visiting museums, historical sites and arts and culture the least.⁸⁸

With regard to what influences their travel purchase behaviour, this generation say that:

- They have already decided on their next destination, which makes it difficult for destinations to influence in the 'dreaming' phase of their travel purchase cycle
- Social media does not influence their travel purchase decisions, but;
- Review websites like TripAdvisor (72%) and content developed by destinations (77%) do.⁸⁹

The Grey Nomad phenomenon is a 'type' of Baby Boomer traveller. They represent a cohort who independently travel around Australia by caravan or campervan for an extended period of time. It's important to note that the original Grey Nomad market (Silent Generation, now in their 70s-90s) had very different attitudes and behaviours as it relates to travel, and whilst the Grey Nomad market remains a growth sector, it does so, because of the generation shift from the Silent Generation to the Baby Boomers, who represent a more tech savvy, cashed up, experience driven market - especially the younger Boomers.

Visitor data (see 3.2.1) and stakeholder feedback suggests that stakeholders are already seeing versions of the Baby Boomer market throughout the region, across various niche interest and market segments. This means they are already drawn to the region due to the region's current experience profile.

It was highlighted throughout consultation that there are a significant portion of newly retired / nearly retired visitors who have been highlighted as being 'high yielding'. This market is an important slice of this cohort.

The major opportunity will be to understand the motivations and travel purchase behaviour of this cohort more intimately to ensure they are well informed on the depth and breadth of the Region's experiences (through marketing initiatives), to encourage longer stays and higher yield.

Millennials

Whilst Millennials represent a smaller part of the current visitor profile to the Region in comparison to the 55+ market (Figure 9), they will be the future visitor segments to target in the next 10 years as they mature, so it's important to whet their appetite for the destination now, and reap the benefits in the future.

In terms of what experiences, they are interested in:

⁸⁷ Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

⁸⁸ Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

⁸⁹ Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

- Relaxation, sightseeing, outdoor adventure, museums, historical sites, and arts and culture, and living by the YOLO (You Only Live Once) mantra when it comes to travel.⁹⁰

With regard to what influences their travel purchase behaviour:

- Two-thirds of Millennials either do not have a destination in mind when beginning to plan a trip, or are considering two different destinations, which means that this market has the opportunity to be influenced more than the Baby Boomers.
- This cohort agree that ads with appealing imagery can influence them, and;
- They consider Facebook and Instagram the most influential social platforms for travel inspiration.⁹¹

Generation Z travellers represent a very small proportion of current travellers to the Region (7% Domestic, 14% International, see Figure 9), have similar predispositions to travel as the Millennials, with the following differences:

- They go on just over 3 trips per year (second to Millennials on 4 trips per year)
- They are slightly prioritising international trips over travelling around Australia (where majority of Millennials prefer to travel domestically)
- They prioritise the YOLO mentality when it comes to experiences, take risks, and focus on crossing things off their travel wish list, as well as activities that take them off the beaten track.
- This cohort are also heavily influenced by Facebook and Instagram, and will look for recommendations on review websites TripAdvisor, by talking with people they know, and are less influenced by advertising.⁹²

Together, the Millennial and Generation Z markets are an attractive proposition for the Region to consider because:

- They take the most trips per year out of any generational segment (nearly 8 trips between them)
- The activities they want to experience align well to what the Region has to offer (outdoor adventure, museums, historical sites, and arts and culture.
- 65% of Millennials are intending to take a short holiday in the next 12 months. This is well above the average Australian at 56.4%.⁹³
- The interstate visitor profiles for South Australia suggest that visitors from Victoria (42% from regional VIC), in particular, could be a specific market to target, with 47% of visitors from Victoria are between 15-44.⁹⁴
- Michele Levine, CEO, Roy Morgan, says: “90% of Australians intending to make their next short holiday a domestic one, tourism bodies will need to ensure that they can cater to Millennials who will make up a large portion of these domestic travellers”.⁹⁵

The Region is already seeing a spike from this generational segment, particularly with international visitors (Figure 9), which is supported by anecdotal evidence from industry suggesting that parts of the Region (eg. Robe, Coonawarra) attract a number of international couples on their honeymoons.

⁹⁰ Expedia's Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

⁹¹ Expedia's Australian Multi-Generational Travel Trends Report 2017 > https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbc2fbbd-abe5-4c41-83c7-6af02261bca6%7Cb9a4eaed-4268-446b-a52d-b06e880ac1ad

⁹² Australian Multi-Generational Travel Trends Report 2017

⁹³ Roy Morgan Holiday Tracking Survey (Australia) April 2017 – March 2018 > <http://www.roymorgan.com/findings/7603-millennials-plan-to-travel-more-than-other-australians-201805250640>

⁹⁴ South Australian Interstate Market Profiles > <https://tourism.sa.gov.au/research-and-statistics/south-australia/interstate-market-profiles>

⁹⁵ Roy Morgan Holiday Tracking Survey (Australia) April 2017 – March 2018

This segment are also more likely to interact with nature based soft and active outdoor adventure experiences (eg. cave diving, wind surfing, cycling, snorkling, etc), in addition to the current events (eg. wine and food, sports, music, arts and culture, etc) which are already strengths in the Region's experience portfolio.

Attracting more of this market will hinge on inspiring them (leveraging YOLO) and by sharing stories and itineraries on relevant and influential platforms. As noted, the cohort also are highly influenced by word of mouth, and also share their experiences widely with their networks.

This can be achieved by investing in in capability building for experiences to ensure these travellers have exceptional experiences and become advocates for the region.

Life Stages

Families

Families of all ages (and groups of families) were identified through the consultation survey and workshops as a very important market for the Region, in particular linked to school holiday travel.

Family travel in Australia is dominated by domestic travel, despite growth in families travelling overseas.⁹⁶

Families are quickly becoming an important segment of the caravan and camping industry, with 'Parents with children still living at home' being the largest segment by lifestyle group taking trips, making up 36% of the domestic caravan and camping market (accounting for the majority of nights of total nights at 31%).⁹⁷ Looking at the breakdown by age, the 30-54 year market makes up 47% of all trips. There has also been solid growth from the younger markets (under 30s) in recent years, which has been fuelled by the increasing demand for experiential and, especially nature-based travel.⁹⁸

Research into the Family Market by Destination New South Wales⁹⁹, found that:

- Family holiday time is precious, and the needs of the entire travel party must be met. The provision of a wide range of accommodation options, a variety of family friendly social and outdoor activities, local attractions and offering all-inclusive travel packages will increase the appeal of domestic holidays.
- Families need to be motivated to travel especially with a sense of immediacy of travelling now. Boosting the appeal of local events and festivals, and food and wine experiences have the potential to generate excitement and interest to travel now and to travel during off-peak periods.

The Region is well positioned to cater for the families, and in particular the caravan and camping market, especially with Intrastate cohort (due to the already high regional awareness), given the Region's selection of outdoor and nature-based experiences, as well as events.

Whilst the Region's stakeholders see this market as an important cohort, they also highlighted the need for more family friendly attractions (for all age groups of children) and activities to keep the families staying longer. This was particularly pertinent in the Mount Gambier, Millicent and Bordertown consultation workshops.

Therefore, the key opportunities to attract this market will hinge on:

- Advocate for the development of new/refreshed family friendly experiences
- Better promotion family friendly experiences from the products themselves, and from a regional perspective
- Activate family friendly accommodation providers (eg. caravan parks) to develop family friendly packages

⁹⁶ <http://www.destinationnsw.com.au/wp-content/uploads/2013/05/nsw-family-market-snapshot.pdf?x15361>

⁹⁷ Caravan Industry Association of Australia – State of the Industry Report 2018 > <https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf>

⁹⁸ Caravan Industry Association of Australia – State of the Industry Report 2019 > <https://www.caravanindustry.com.au/research>

⁹⁹ NSW Family Travel Market > <http://www.destinationnsw.com.au/wp-content/uploads/2013/05/nsw-family-market-snapshot.pdf?x15361>

SINKs and DINKs

Single Income No Kids (SINK) and Double Income No Kids (DINKS) are both attractive market segments for the whole region. The latest National Visitor Survey (December 2018) identified that while growth in overnight travel has been widespread across all life cycle groups, the increase in trips has been more pronounced for singles (15%) than those who have a partner (6%) in 2018.¹⁰⁰

The increase for singles has been evenly shared between young and midlife singles (16%), older working singles (15%) and older non-working singles (15%). Consistent with the stronger growth in travel by those from single life cycle groups, the number of overnight trips taken by those travelling alone increased 13% in 2018.¹⁰¹

The Region is well positioned to attract this market, and it was identified in all reports and consultation that it has already been doing so. The Region's stakeholders in Mount Gambier and Coonawarra identified that this market could be a particularly lucrative market, especially those from Victoria (Melbourne) looking for a long weekend break.

The experience themes and events within the Region (particularly Food/Wine, Arts/Culture, History/Heritage, and Adventure) are conducive to attracting this life stage, particularly across the Baby Boomer-Millennial generational segments, and therefore represent a great opportunity for the Region.

Niche Interest Segments

Niche Interest Segments relate to customer groups that will travel for a specific interest. The internet facilitates unsurpassed connections between people and information and as a result people can pursue information and experiences on their passions now more than ever, and they will travel far and wide to fulfil their passions.

To successfully attract an 'Interest' segment to a destination, a critical mass of relevant experiences must be available in region, coupled with a laser focus on marketing messaging on the right platforms to drive inspiration for travel.

When undertaking an audit of the visitor experiences in region (see Section 5) it became evident that the Limestone Coast is home to an abundance of experiences which can support a number of Niche Interest Segments.

Consultation with industry also highlighted numerous opportunities to continue develop experiences to support the niche interest segments.

Nature Based Adventure Tourism

Adventure Tourism is a subset of Nature Based Tourism. In terms of Domestic performance, the Nature Based sector has seen a 10.6% growth from 2011-2016, with the majority of visitors being domestic overnight (47%).¹⁰²

¹⁰⁰ TRA National Visitor Survey Report (December 2018) > <https://www.tra.gov.au/Domestic/Domestic-tourism-results/domestic-tourism-results>

¹⁰¹ TRA National Visitor Survey Report (December 2018)

¹⁰² Tourism investment in Regional Australia > <https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-in-Regional-Australia-2017.pdf>

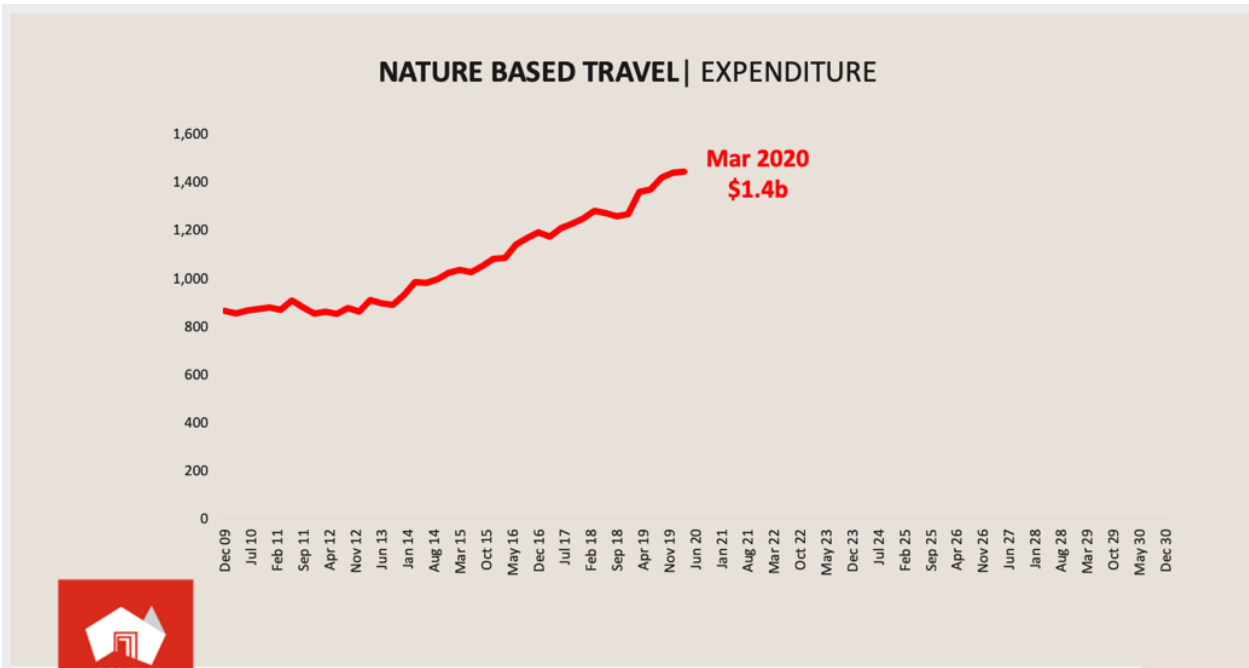
Over the past 10 years there has been a steady incline in nature based tourism expenditure and demand in South Australia from interstate and intrastate markets, which has surprisingly been maintained through the initial stages of the COVID-19 lockdown (See Figure 28 and 29).

There are two main categories of adventure activities, hard adventure or soft adventure. Both hard and soft adventures are highly lucrative segments of the adventure tourism sector.

In addition to hard or soft adventure activities, adventure enthusiasts, such as avid kayakers, cyclists, or bird watchers, become progressively more skilled are described as passionate about a certain sport or activity, tending to pursue the same activity trip after trip, seeking new and exciting destinations in the process.

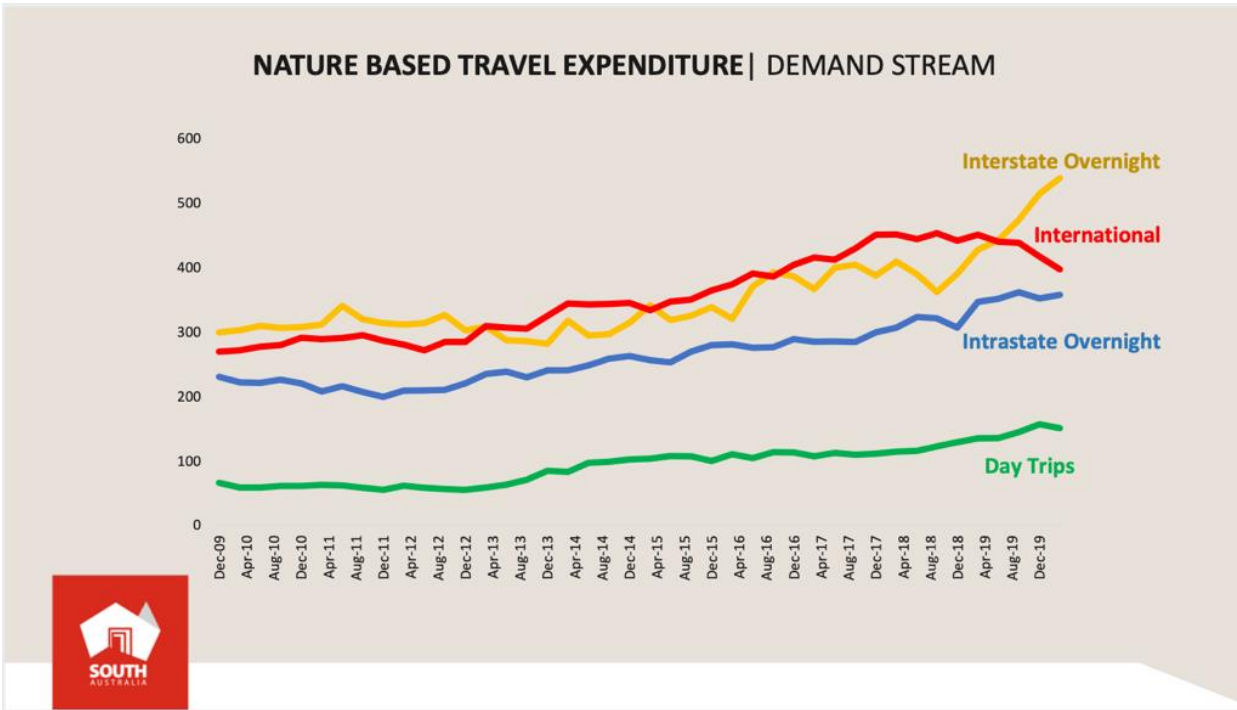
Given the breadth and depth of natural assets throughout the Limestone Coast, it is an opportune time to investigate and develop at plans to activate opportunities to drive growth from the region’s high yielding visitor segments and also niche interest travellers, as outlined in Section 5, with the specific opportunities outlined in section Section 5.3.2.

Figure 28 - South Australia Expenditure on Nature Based Tourism Experiences, March 2020



Data Source: The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020

Figure 29 - South Australia Demand Streams for Nature Based Tourism Experiences, March 2020



Data Source: The Value of Tourism to South Australia Pre-COVID-19 – report from SATC Research and Insights Team, August 2020

Food and Wine Tourism

The enjoyment of food and wine is integral to the Australian tourism experience, which embodies quality ingredients, fresh produce and innovative cuisine. Food and wine tourism rely on visitors directly enjoying quality Australian food and wine. Activities include visiting wineries, breweries and distilleries, and eating out at restaurants.

Of all the key attractors in regional Australia, the enjoyment of food and wine is a significant one and one of the highest growth activities, seeing a 5.2% growth in the sector over the 5 years from 2011-2016.¹⁰³

Interestingly, the majority of the Food and Wine visitors in Australia are domestic day trippers (57%), which makes sense when most wine regions in Australia are within a daytrip from most major cities (especially South Australia wine regions).¹⁰⁴

Wine is a key draw card for South Australian international visitors, with 34% of all international visitors visiting wine regions while in South Australia.¹⁰⁵ South Australia, with its strong reputation for quality wine and easily accessible wine regions, has the highest instance of wine region visitation of any state, with more than a third (34%) of international visitors spending time in wine regions. This is more than double the national average and many times higher than Victoria (12%), New South Wales (7%) and Queensland (2%).¹⁰⁶

¹⁰³ Tourism investment in Regional Australia > <https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf>

¹⁰⁴ Tourism investment in Regional Australia > <https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf>

¹⁰⁵ South Australian International Wine Tourism Strategy 2020

¹⁰⁶ South Australian International Wine Tourism Strategy 2020

Whilst there is no quantitative domestic data regarding the state of play for wine tourism in South Australia available for analysis¹⁰⁷, there is significant anecdotal evidence that wine tourism is continuing to evolve and grow, especially for those wine brands who push the envelope with regard to experience development.

The Region has potential to drive increased demand for food and wine experiences (Refer Section 5 and Section 9.1.2) especially with the increased number of bookable experiences developed through the Mixed Dozen Project, and other new experiences such as the revitalisation of the Royal Oak Hotel in Penola to compliment Pipers of Penola and Hollicks Estate, along with the array of quality restaurants and cafes in Robe and the Mayura Station Tasting Room experience.

Across the border in the Southern Grampians, the town of Dunkeld highlights the ability for food and wine experiences to drive regional visitation and economic growth¹⁰⁸. The Royal Mail Hotel has grown to become a “must-visit” for foodie travellers in Australia through its destination dining rooms, which is supported by high end accommodation immersive food experiences. Its success has also supports the wider community, with the regeneration of the Town’s main street and attracting new residents to the town¹⁰⁹.

As outlined in section 5.3.2 there are numerous opportunities to grow this niche market segment through experience development, strategic marketing and partnerships.

Agritourism

Building on the niche of Food and Wine, Agritourism has traditionally been thought of as being simply farm stays and winery visits. The term agritourism now encompasses a wide variety of activities where agriculture and tourism intersect. Essentially, ‘agritourism’ is the act of going to a region to visit a farm or food-related business (including restaurants, markets/events, produce outlets and natural attractions) for enjoyment, education, or to participate in activities and events.

Approximately 1.8 million domestic and international tourists visit Australian farms in 2015-16, and this has been growing by approximately 9% each year. The sector is currently worth approximately \$9.4 billion per annum.¹¹⁰

The Region is home to a growing number of agritourism experiences, from traditional cellar doors and providores, through to livestock sale yards, and livestock and agricultural shows. Mayura Station Tasting Room is the region’s hero experience in this space.

The agritourism experiences on offer not only attract leisure travellers but are a major drawcard for consistent and regular group travel for business travellers from intrastate and interstate markets. As outlined in Section 5 and 9.1.2 the Region has a great opportunity to further develop visitor experiences around it agricultural strengths of red meat, dairy, wine, horticulture and fishing (lobster) industry.

Art, Culture + Heritage Tourism

Australia’s strong Indigenous history and culture and modern European history means there are opportunities to build visitation in Australia’s cultural and heritage segment to the Region.

¹⁰⁷ As informed by Robin Shaw of Wine Tourism Australia, June 2019

¹⁰⁸ <https://thenewdaily.com.au/sponsored/2018/05/04/royal-mail-hotel-escape/>

¹⁰⁹ <https://royalmail.com.au/about/>

¹¹⁰ Australian Regional Tourism > <https://regionaltourism.com.au/projects/agritourism/>

Cultural and heritage tourism rely on experiences which directly relate to the enjoyment of history and culture, with activities including visiting museums, art galleries, heritage buildings, sites and monuments, attending festivals, fairs or music performances, public art or art and craft workshops as well as experiencing indigenous art and culture or visiting an indigenous site or community.

Culture and Heritage Tourism in regional Australia has grown 7.9% in visitation per year from 2011-2016, with 49% of all visitors being domestic day trippers. The Limestone Coast has also been identified by Tourism Research Australia as a nation-wide notable destination for Culture and Heritage experiences, alongside Uluru, Goldfields, Port Arthur and the Blue Mountains.¹¹¹

The Limestone Coast supports a strong network of Heritage attractions and events, with key story and experience based the Region's significant Indigenous foundations, rich maritime, agriculture pastoralists, Saint Mary MacKillop, Bob Hawke and Chinese gold mining heritage and stories (Refer Section 5). Each experience supports visitors overall experience in the Region and understanding of its people, place, geography and intra-regional history.

It was identified through consultation, that the maintenance and staffing of (often) volunteer run heritage assets is a key challenge across the Region's many heritage assets.

Opportunities to support existing heritage and cultural experiences (staffing, guide training, grant funding, marketing, maintenance) as well as supporting the development of new experiences, such as the Guides of Mount Gambier initiative and AirBnB Experiences, are highlighted in Section 9.1.2.

The Region also has an important opportunity develop and share the culture and stories from traditional Aboriginal owners (further outlined in Section 5). The Boandik and Ngarrindjeri people have lived continuously on Country for over 50,000 years, and there are increasing positive steps are being taken to grow reconciliation within local communities.

Specifically, "Forage on the Coast" is a new indigenous foraging tour developed in conjunction with Guides of Mount Gambier and is being distributed through AirBnB Experiences and the Mount Gambier Visitor Centres. The tour runs along the coast at Port MacDonnell¹¹² with Boandik Elder Ken Jones, and key example of an immersive visitor experience sharing indigenous culture, language and stories.

Developing the cultural attractions in the region are also a major opportunity. The James Morrison Academy and Generations in Jazz (GIJ) has put the region on the map for Jazz lovers, however outside of GIJ event and academy performances, there are limited opportunities for visitors to have a Jazz experience. Regular exhibitions in Art Galleries such as Bordertown, Millicent, Mount Gambier (Riddoch) and Naracoorte are also attracting cultural visitors.

The SA Tourism Heritage Strategy (see Section 11.2) will also be a key opportunity to grow new and activate existing heritage and cultural experiences in the region.

Specific experience development opportunities to grow this sector can be found in 5.3.2.

¹¹¹ Tourism investment in Regional Australia > <https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf>, page 10

¹¹² <https://www.airbnb.com.au/experiences/628341>

Niche Market Segments

Niche Market Segments is a segment of a larger market that can be defined by its own unique needs, preferences, product or identity that makes it different from the market at large.

Often the 'larger market' only refers to demographic data like age and location, whereas a niche market gives more clarity around the market's travel nuances, like why they are travelling, or what they are travelling for.

To attract Niche 'Market' segments requires a tailored strategy, and often necessitates less consumer direct marketing, and more engagement with the niche market stakeholders through mapping the relevant buyer persona journey map and touchpoints, along with ongoing liaison and coordination of relevant opportunities.

Consultation highlighted a number of niche market segments that are already travelling to the Limestone Coast, and key opportunities were also highlighted to attract a higher percentage of these markets in the future.

Caravan and Camping

Australia's domestic caravan and camping visitor economy continues to break records, with total nights spent caravan and camping increasing by 9% to reach a record 54.8 million for the year ending September 2018.¹¹³

12.6 million overnight trips were recorded for the year ending September 2018, marking a 7.4% increase from the previous year.

All age sectors experienced growth for the same period:

- 20 to 29 year segment that performed the strongest, increasing by 16% on the previous year
- The 30 to 54 segments also increased by 5%
- The 55+ market continues to represent the second largest cohort, increasing by 6% on the previous year.

In 2017, the South Australian Caravan and Camping Industry injected \$237 million dollars into the state's economy, and accounted for 1,513 FTE equivalent jobs.¹¹⁴

The research also examined popular activities and found that over 6.5 million caravan and camping domestic visitors ate out at a restaurant or cafe, making it the most preferred activity. Other popular activities included going to the beach (4.4m) and sightseeing (4.2m). These choices of activity not only highlight the interests of many caravan and campers, but also demonstrates the value that caravan and camping has in connecting Australians to nature-based experiences.¹¹⁵

Additionally, research suggests that the drive market, and specifically the caravan and camping market will spike as COVID-19 social distancing restrictions ease, as an affordable and social distancing friendly accommodation option for city dwellers wishing to escape, therefore presenting an imminent opportunity

¹¹³ 2018 Caravan and Camping State of the Industry Report 2018 > <https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf>

¹¹⁴ Australian Caravan Industry Economic value Report > <https://vicparks.com.au/wp-content/uploads/2018/11/Australia-Caravan-Industry-Economic-Value-2018.pdf>

¹¹⁵ 2018 Caravan and Camping State of the Industry Report 2018 > <https://www.caravanqld.com.au/wp-content/uploads/2018/10/2018-State-of-Industry-Report.pdf>

for the region.¹¹⁶ Mount Gambier has recently been awarded 'RV Friendly' status by the Campervan and Motorhome Club of Australia (CMCA) and identifies as a Community that welcomes RVs by SA Parks.

The Limestone Coast has a strong network of Caravan and Holiday Parks throughout (refer Section 5). This includes national brands of Discovery Holiday Parks (Robe) and Big 4 (Naracoorte and Mount Gambier) through to privately owned/managed/council owned parks. The Department of Environment and Water (DEW) also has a strong network of campsites across the Region's National and Conservation Parks. There is also a growing number of self-contained Recreational Vehicle (RV) travellers and demand for quality camping options within key locations across the Region are also sought after.

The Region is already well positioned to continue attract more of this market (across all generational segments), with its numerous caravan and camping parks, and the well-established nature-based camping experiences.

Business Events

Business event visitors deliver high yields for the Australian tourism industry with an average overnight spend of \$238 per night, compared to an average \$161 per night spend by all overnight visitors to Australia. This high delegate spend has created an increasingly competitive environment for the business events industry in Australia.¹¹⁷

For the Region, business travel accounts for 17% of total overnight visits (106,000), 13% of nights and have an average length of stay of 2 days¹¹⁸.

The Region is well positioned to leverage the business events market, featuring wide ranging levels of capacity and quality event space options throughout the whole destination.

The Region is home to numerous event and function venues from large scale conferencing spaces including The Riddoch and Main Corner Complex in Mount Gambier and the Bordertown Civic Centre, through to many and varied small to medium event spaces available at many of the wineries, restaurants, sports clubs and town halls. Mount Gambier is also home to over ten 3-4-star motels whom also have adjoining conferencing spaces perfectly placed to host business events.

In March 2018, it was identified that the Region had a group of operators keen to pursue this market pitching on behalf of the region. Since 2018 there have been a number of conferences valued at over \$25k held in Mount Gambier with great success. With the potential build of the new Community and Recreation Hub scheduled to be completed in 2022, this will provide increased capacity for Business Events to be held in the Region.

The LCLGA Priorities to Grow the Visitor Economy had a pillar dedicated to grow this market over 3 years. A business events trade brochure was developed and attended specific trade events pitching the regions business events venues and positioned the region as a pre-post touring options for large scale events while also being considered for smaller scale business events (30- 250pax). LCLGA were successful in securing several Business events with an economic value exceeding \$400k.

¹¹⁶ Driving Success from Surviving to Thriving: Drive Tourism and COVID19 Recovery

¹¹⁷ Tourism Australia, Business Events <http://www.tourism.australia.com/business-events.aspx>

¹¹⁸ SATC Regional Tourism Profile Limestone Coast171 (December 2016 – December 2018)

The Limestone Coast is financial member of the Adelaide Convention Bureau and has access to their pitch portal which lays out all the business events scheduled or pitched in South Australia over a 3-5 year horizon. Industry participation has been static but certainly has scope to improve the coordination.

Given the proximity of the Region to Adelaide, the Limestone Coast is less likely to be considered an option for pre and post touring of Adelaide based events in comparison to its neighbouring regions. However, this presents an opportunity to position and market the Region as a business events destination in its own right, including pre and post event packaging solutions, targeting not only the Adelaide MICE (Meetings, Incentives, Conferencing and Events) market, but also that of larger Victorian regional centres (Bendigo and Ballarat) and also Melbourne based businesses. Sector specific conferences related to the Region's key industry sectors are also a key opportunity (eg tourism, geology, hydrology, agriculture, forestry, viticulture, fishing).

The Region will need to identify the buyer personas for Business Events, journey map their touchpoints, and implement a strategic communication strategy to effectively drive demand from this market.

Sporting Events

Sport tourism refers to travel which involves either observing or participating in a sporting event, staying apart from their usual environment. This is a fast-growing sector of the global travel industry, as people increasingly travel to watch or participate in their favourite sport.

It's been identified by Tourism Australia, that in Regional Australia, participation sports, for adults and school children alike, provide a key motivator for visitation throughout the year and therefore the value to the overall visitor economy should not be understated¹¹⁹.

Throughout consultation developing and growing the sport tourism niche was a repeated opportunity, and with numerous sporting codes, clubs, quality facilities and a passionate sporting community, the potential is abundant.

Councils within the region are currently planning and investing in their sport and recreation plans and assets, working toward the development of high quality, high capacity facilities which will aid in targeting larger scale participatory and spectator events for an increasing number of sporting codes across the region.

The Region was set to host the SA Masters Games in 2020 until it was cancelled due to COVID-19. It is hoped that District Council of Tatiara will be able to host the event in an upcoming year. The success of the recent Great Victorian Bike Ride (ref section 5) is a key example of the potential these types of sports events can bring to a Region. Other more regular cycling events are also held in Mount Gambier such as, BMX Championships, Tour of the Great South Coast (which includes riders who then go on to ride in the Tour de France), 100 Mile Classic, Downhill Mountainbikers and The Redbull Pump Track.

Numerous opportunities to grow Sport Events in the region are outlined in Section 6.6, specifically the ongoing development of facilities and infrastructure, and to actively attract Sport Events to the region that align to the Region's sporting assets. Additionally, like business events, the Region will need to map the

¹¹⁹ <https://www.ecotourism.org.au/assets/Resources-Hub-Ecotourism-Research/Tourism-Investment-In-Regional-Australia-2017.pdf>, "Wellness Tourism"

buyer personas journey and identifying relevant touchpoints and implement a strategic communication strategy to effectively drive demand from this market.

Group Travel

Consultation highlighted that the Region already attracts a significant number of groups who travel for niche interests, including motorcycle and car clubs, school groups, probus and other niche interest groups.

In March 2018, 52 operators indicated their desire to be involved in working together to attract more of the coach or group travel sector. From this, an opportunity to develop a digital planner manual targeted at wholesalers and group tour planners was initiated. A database of over 250 domestic group planners was purchased, and presented to the Planners the Limestone Coast as a destination and highlighted the coach friendly product. 27 operators were involved, this was received extremely well by the planners. With increased resources this work could be advanced.

The key to successfully attracting group travellers is being able to demonstrate an ability to cater for large groups particularly from an accommodation and dining perspective, and for these services to be commissionable (to be sold by group travel planners).

Opportunities to grow Group Travel in the region include mapping the buyer personas, identifying touchpoints, growth of commissionable products, advocacy for tourism experience developments that support relevant Group Travel, and growing awareness and length of stay in the Region for with Group Travel Planners.

Cruise

In 2018/2019, the Cruise sector super charged South Australia's visitor economy with a record 84 cruise ship visits planned, a 23% growth on the previous year, injecting a record breaking \$118 million into the South Australia economy¹²⁰, well exceeding the State Government's 2020 target¹²¹ of 100 cruise ship visits vessels (and \$200m contribution to the State economy).

While Covid-19 has effectively shut the cruise industry sector in the short-term, longer term recovery of this sector will present an opportunity for the Region to attract cruise ships, particularly in the already identified port of Robe or Portland (Victoria)

Portland has a growing cruise visits and has an active Cruise growth strategy¹²². They are looking to the Limestone Coast Region to support shore excursion experience's they can't offer, which is a good opportunity for the Region to capitalise on. The Region is currently considering entering into a formal agreement (MoU) with Glenelg Shire to advance the overall tourism outcomes for the cross-border destination including cruise ships.

While early days of COVID-19 recovery for the industry, opportunities may exist for smaller Australian destinations such as Robe to attract cruise lines looking for COVID-19 safe destinations. However, the social

¹²⁰ <https://www.thehotelconversation.com.au/news/2019/02/04/south-australias-record-month-cruise-ships-begins/1549255513>

¹²¹ SATC Cruise Ship Strategy > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={E8B0A5BD-7C3D-42B1-9F9B-06FFC96C8C17}&B=False>

¹²² https://www.glenelg.vic.gov.au/Files/Glenelg_Tourism_Strategy_2019-2026_Web.pdf

license of local communities in welcoming cruise ships would need to obtain before pursuing cruise ship visits especially in light of recent sustainability and health/safety (COVID-19) issues on cruise ships.

9.2 Branding Strategy

9.2.1 Limestone Coast Regional Brand

In 2016, the Limestone Coast Collective spearheaded a branding project for the region. The Limestone Coast Branding Project involved working collaboratively to develop a recognisable regional “Place Brand” and a visual identifier to convey the amalgamation of positive perceptions, thoughts and feelings that consumers hold about the Limestone Coast. It is designed to trigger a consistent and growing “story” of the Limestone Coast as a creative, rich, innovative, diverse and industrious place.

Through consultations undertaken with stakeholders in the region, a picture of the Limestone Coast developed:

- Home to a wide range of industries, attractions and features
- Built upon ancient and fertile soil
- Rich in character and opportunity
- Heritage listed caves, beaches, walking trails, fishing and camping spots
- Abundant water supplies and natural resources
- Lush and green with forests, vineyards, vegetables and crops
- Hive of business activity with farming, aquaculture, tourism, wine, dairy and fishing
- Natural beauty and cooler climate

The Limestone Coast Collective are the current custodians of the Brand, however, LCLGA are managing any queries with regard to implementation.

Once the Brand was developed, a short video was published to communicate the brand proposition more broadly. This was followed up with the dissemination of the strategy and implementation guidelines through the various sector groups and associations.

There has been minimal uptake of the use of the brand by industry to date (June 2020) apart from the following:

- Regional digital marketing assets (see below)
- A number of registered users have implemented the Brand as per the usage guidelines.
- In 2019/2020, the Branding was used in the Limestone Coast Wine Trails ‘Mixed Dozen’ Project (details below).

9.2.2 Brand Stories

The Limestone Coast is already well known for its world famous clean, green, sustainable and pristine credentials which is central to the region’s ability to yield quality products, including wine, beef, lamb, vegetables, fruit, and crops.

Consultation with industry highlighted that the region should be sharing stories that uncover the Limestone Coast’s unique geology and climatic features (freshest air in Australia) which supports the diversity and sustainable development of tourism experiences in the Region.

Along with this overarching story theme, the Limestone Coast has a number of storylines relevant to parts of the region, including;

- Pre European Indigenous stories (as per section 5.5)
- Agricultural and Pastoralist heritage (around Bordertown/Mundulla/Keith)
- Early settlers/Soldier Settlers
- Mary MacKillop/Aussie Camino (Penola)
- Chinese Overland Goldfield Travellers (including cross border with Victoria) (Robe to Penola, then across the Victorial Border)
- Gold Escort Route (Golden Way) stories (Keith, Bordertown and Victorian towns)
- Maritime Trails along the Coastlines

9.3 Destination Marketing

As noted in Section 11.10, the Region currently has 24 identified tourism stakeholder groups, all whom implement various marketing initiatives individually, with slight nuances directed at slightly different visitor segments.

There has not been a collaborative marketing strategy which encompasses the whole tourism region for approximately 10 years.

Since the restructure of regional tourism investment from SATC in 2011, the region has not actively marketed the region direct to consumers, rather focused on experience development and trade marketing.

The lack of marketing investment and visible marketing activity was highlighted by the majority of stakeholders as a major challenge for the Region. Additionally, the perceived investment not only from within the region, but also from the South Australian Tourism Commission.

9.3.1 Regional Marketing Snapshot

The below table (Table 17) is a snapshot of the current tourism marketing investment from key tourism stakeholders within the region as at May 2020.

Table 17 - Snapshot of Marketing Initiatives implemented by key tourism stakeholders in the Limestone Coast region (with tourism aspect)

	WEBSITE	FACEBOOK	INSTAGRAM	TWITTER	YOUTUBE	CONSUMER EMAIL MARKETING	PUBLIC RELATIONS	COLLATERAL (OWN PRODUCED)	OFFLINE ADVERTISING	CONSUMER SHOWS	TRADE SHOWS
REGIONAL ORGANISATIONS											
Limestone Coast LGA	https://www.limestonecoast.org.au/locale/limestone-coast-wine-trails	N	N	N	https://www.youtube.com/channel/UCej7ba8untC7HVo_u40mOGnA	N	Y	Y – Business Events, China Market, Inbound Markets	?	N	Y
LOCAL GOVERNMENT											
City of Mount Gambier	https://discovermountgambier.com.au/	https://www.facebook.com/discovermountgambier/	https://www.instagram.com/discovermount_gambier/	N	https://www.youtube.com/channel/UCkAMMpYKvKp-t_mHZmxATLA https://www.youtube.com/user/CityOfMountGambier	N	Y	Y – via VIC	Y	N	N
District Council of Grant	https://www.dcgrant.sa.gov.au/discover/planyourvisit	Y – Resident focussed content only	N	N	https://www.youtube.com/channel/UCl0s4o2vBpVtvvbsWxbr5WQ	N	N	Y – via VIC	?	N	N
Wattle Range Council	https://www.wattlerange.sa.gov.au/tourism/tourism	Y – Resident focussed content only	N	N	N	N	N	Y – via VIC	?	N	N
District Council of Robe	https://www.robe.sa.gov.au/explore	Y – Resident focussed content only	N	N	N	N	N	Y – via VIC	?	N	N

	WEBSITE	FACEBOOK	INSTAGRAM	TWITTER	YOUTUBE	CONSUMER EMAIL MARKETING	PUBLIC RELATIONS	COLLATERAL (OWN PRODUCED)	OFFLINE ADVERTISING	CONSUMER SHOWS	TRADE SHOWS
Kingston District Council	https://www.kingstondc.sa.gov.au/discover	Y - Some tourism content https://www.facebook.com/KingstonDistrictCouncil	https://www.instagram.com/kingstondistrictcouncil/	N	N	N	N	Y – via VIC	?	N	N
Naracoorte Lucindale Council	https://www.naracoortelucindale.sa.gov.au/stay-do	https://www.facebook.com/naracoortelucindale/	https://www.instagram.com/naracoortelucindale/	https://twitter.com/NLucindale	https://www.youtube.com/user/NaracoorteLucindale	N	N	Y – via VIC	?	N	N
Tatiara District Council	https://visittatiara.com.au/	Y – Resident focussed content only	https://www.instagram.com/visittatiara/	N	https://www.youtube.com/channel/UCVu8ut29Shj1p6KtPQ5QbLg	N	N	Y – via VIC	?	N	N
INDUSTRY GROUPS											
Robe Tourism Association	https://www.robe.com.au/	https://www.facebook.com/robesouthaustralia	https://www.instagram.com/robesouthaustralia/	N	N	N	N	Yes – Art Map	N	N	N
Kingston Connect	https://www.kingstonconnect.com.au/	https://www.facebook.com/kingstonconnect	https://www.instagram.com/kingstonconnect	N	N	Y	N	N	N	N	N
Tourism Mount Gambier	https://discovermountgambier.com.au/	https://www.facebook.com/discovermountgambier/	https://www.instagram.com/discovermountgambier/	N	N	N	N	N	N	N	N
Limestone Coast Food	https://limestonecoastfood.com.au/	https://www.facebook.com/Limestone-Coast-Food-Group-Farmers-and-Makers-Market-139156436167926	N	N	https://www.youtube.com/channel/UCkAMMpYKvKp-t_mHZmxATLA https://www.youtube.com/user/CityOfMountGambier	N	N	N	N	N	N

	WEBSITE	FACEBOOK	INSTAGRAM	TWITTER	YOUTUBE	CONSUMER EMAIL MARKETING	PUBLIC RELATIONS	COLLATERAL (OWN PRODUCED)	OFFLINE ADVERTISING	CONSUMER SHOWS	TRADE SHOWS
Limestone Coast Wine	https://limestonecoastwine.com.au/	https://www.facebook.com/LimestoneCoastWine	https://www.instagram.com/lcwineshow/	https://twitter.com/lc_gwc	https://www.youtube.com/channel/UClipPYZXd4cmVGTWRnPUA2w https://www.youtube.com/user/limestonecoastwine11	?	Y	?	?	?	?
Wrattonbully Wine Region	http://www.wrattonbullywineregion.com/	https://www.facebook.com/wrattonbully	N	N	N	?	Y	?	?	?	?
Coonawarra Vignerons	https://coonawarra.org/	https://www.facebook.com/coonawarra/	https://www.instagram.com/coonawarra_wine/	https://twitter.com/coonawarrawine	Planned	?	Y	Y	Y	Y – via Wine Australia opportunities	Y – Coonawarra Cup, Roadshow

Table 18 - Review of whole of region tourism marketing activities for the Limestone Coast Tourism Region

BRAND	ACTIVITY	OWNER	CUSTOMER GROUP	REVIEW NOTES
Limestone Coast Unearth Your Treasures	www.limestonecoast.org.au	Mixed Doz Consortia?	Primary – Visitors	<ul style="list-style-type: none"> Developed as key communication medium for ‘Mixed Dozen’ project (as outlined below) Digital itinerary software platform (using Alpaca, integrating Australian Tourism Data Warehouse listings) Nil storytelling Supporting visitors in their Planning and In Destination stages of travel Nil search credibility/visibility Visitors require direct link to access website
	http://thelimestonecoast.com.au/	Limestone Coast Collaborative (LCLGA from 1 July 2020?)	Primary – industry	<ul style="list-style-type: none"> Owned/managed by The Limestone Coast Collaborative Developed 2016 to communicate the branding project to industry No new content since 2016
	https://www.facebook.com/LimestoneCoastCollaborative	Limestone Coast Collaborative	Primary - Visitors	<ul style="list-style-type: none"> Owned/managed by The Limestone Coast Collaborative Developed 2014 Focus on promoting events in the region (specifically One Night Stand in Lucindale) Call to action > industry website http://thelimestonecoast.com.au/
	https://www.instagram.com/limestonecoast/	Limestone Coast Collaborative	Primary – Locals	<ul style="list-style-type: none"> No activity since account opened.
	https://www.youtube.com/channel/UCej7ba8untC7HVou40mOGnA	Limestone Coast LGA	Primary - Locals	<ul style="list-style-type: none"> Established 2018 No activity for over 1 year Some promotion of the new Brand implementation
Limestone Coast Shop	https://www.facebook.com/shoplimestonecoast	Hello Friday - Private Enterprise	Primary – Locals Secondary - Visitors	<ul style="list-style-type: none"> Developed early 2020 Focus on supporting retailers in the region by buying local. Minimal engagement Promoted Hashtag > #shoplimestonecoast (262 uses)
	https://www.instagram.com/shoplimestonecoast/	Hello Friday - Private Enterprise	Primary – Locals Secondary - Visitors	

Limestone Coast Interact	https://www.facebook.com/interactlimestonecoast	Hello Friday - Private Enterprise	Primary – Locals Secondary - Visitors	<ul style="list-style-type: none"> • Developed early 2020 • Supporting a sense of community in the region through live streamed interviews and content from locals sharing their awesome stories and their passions • Excellent engagement across Fb and IG • Promoted Hashtag > #interactlimestonecoast (103 uses)
	https://www.instagram.com/interactlimestonecoast/			
What's On Limestone Coast	https://www.facebook.com/WhatsOnLimestoneCoast/	Unknown	Primary – Locals + visitors	<ul style="list-style-type: none"> • Curating all local and tourist events in one FB page
Limestone Coast Beaches	https://www.instagram.com/limestonecoastbeaches/	Unknown	Primary - Visitors	<ul style="list-style-type: none"> • Curating images of the beautiful beaches in the region • Good engagement from followers • Promoted Hashtags > #limestonecoastbeaches (880 uses)
My Limestone Coast	https://www.facebook.com/mylimestonecoast	Abbie – Beachport Local	Primary – Locals Secondary - Visitors	<ul style="list-style-type: none"> • Published 2018 • A narrative of the regions people and places • Minimal following and engagement • Promoted Hashtag > #mylimestonecoast (647 uses)
	https://www.instagram.com/mylimestonecoast/		Primary – Locals Secondary - Visitors	

9.3.2 Australian Tourism Data Warehouse Product Listings

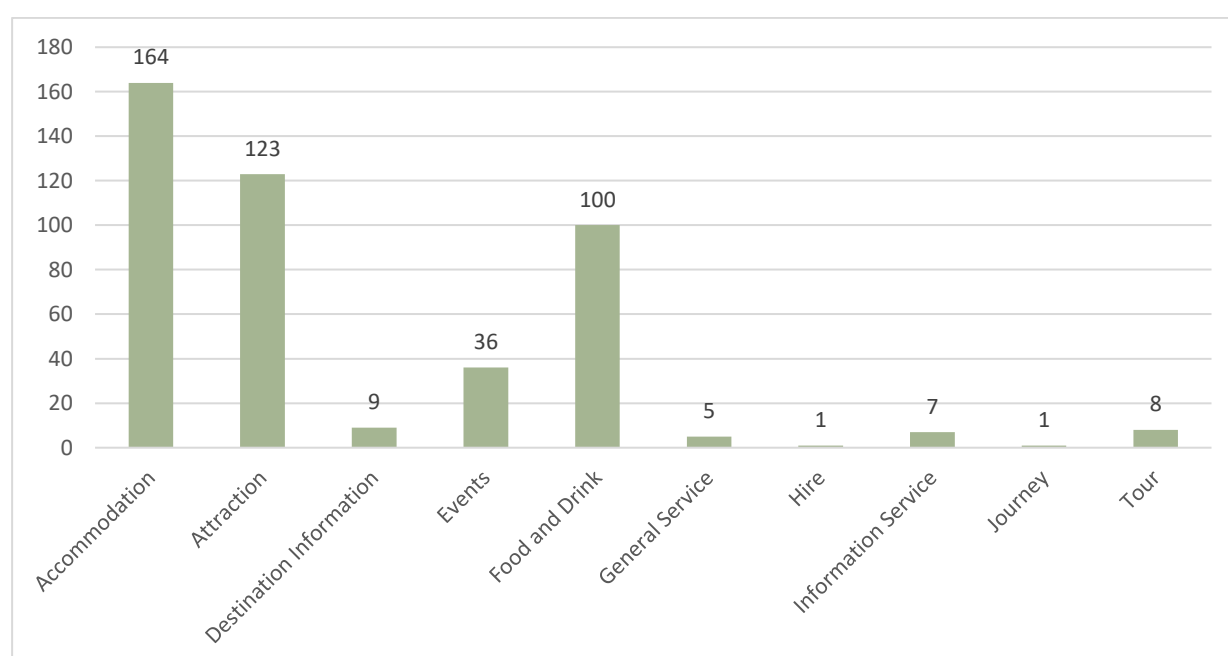
Australian Tourism Data Warehouse (ATDW) is the national digital database for tourism product, providing free listing for all South Australian tourism businesses and events (subsidised by SATC), which can then be distributed throughout Australia and global websites, such as www.southaustralia.com.

The inclusion of all regional tourism experiences and products on the ATDW is a simple and effective way to increase the digital footprint of tourism experiences in the region.

SATC reported that the Region had a total of 454 listings on ATDW as at 28 April 2020. A breakdown of the number of listings within each category is available below.

Whilst this is a high number of listings, there are still many tourism experiences that are not listed in this database, given that as of March 2018, there were 765 tourism businesses in the region.¹²³

Figure 30 - ADTW Listings for the Limestone Coast Tourism Region as at April 2020



9.3.3 Online Product Distribution

Through consultation with stakeholders, it was identified that there are still many tourism experiences that are not online bookable.

Consultation also highlighted a limited number of commissionable experiences in the Region (tourism operators offering commission to wholesalers to distribute product to international visitor markets), which is a challenge when it comes to attracting international and high yielding interstate visitors. It's also a challenge in being able to grow the length of stay in the region from Group Tour itineraries.

Opportunities exist to educate tourism operators on how to activate online bookings, and also advocate for the development of commissionable product and where commissionable product exists, connect and collaborate to harness opportunities and provide economies of scale at trade events.

¹²³ LCLGA Information Report – LCLGA Tourism Industry Development Manager to LCLGA Tourism Management Group, March 2018

9.3.4 Visitor Sentiment

Research and update with relevant hashtags promoted by SATC and Councils/Industry Organisations/Key Events

Destination Hashtags

Hashtags are used by social media users to tag their content into groups of related content. In the case of a visitor, they may publish a photo and use a hashtag of the location of the photo, of how they are feeling, or who they are with (as an example).

With destination marketing, the aim is to encourage visitors to publish photos of themselves whilst experiencing the Region, and then share using a hashtag that the Region actively promotes. This helps the region to be able to collate user generated content (highly trusted) whilst also building a 'home' for all content relating to experiencing the region, used as inspiration for potential visitors.

Table 19 - Review of Limestone Coast Regional hashtags performance

Hashtag (via Instagram)	# Uses	Notes + Recommendations
#limestonecoast	62.6K	This is used to promote anything and everything in the Region. Not a promoted hashtag.
#visitlimestonecoast	46	Used by @mylimestonecoast and visitors.
#limestonecoastbeaches	882	Use by residents + local businesses, photographers, and visitors. Good quality tourism images.
#limestonecoastpantry	1,885	Promoted by Limestone Coast Pantry (based in Mount Gambier) used by the business and by customers.
#mylimestonecoast	665	Used by @mylimestonecoast and locals mostly. A few visitor images.
#mountgambier	73,796	Promoted by City of Mount Gambier. Promotes everything and anything in the City.
#discovermountgambier	4,302	Promoted by City of Mount Gambier. Used by residents, local businesses, photographers, visitors.
#coonawarra	35,350	Used by residents, visitors, wine businesses.
#takemebacktorobe	2,031	Promoted by Robe Business and Tourism Association. Used by visitors, photographers, visitors, local businesses.
#southaustraliasfavouriteasidetown	889	Promoted by Robe Business and Tourism Association. Used by visitors, photographers, visitors, travel writer.
#robesa	13,232	Used by fashion designers, visitors, photographers, visitors, local businesses.
#kingstonse	6,440	Promoted by Kingston Connect and Kingston DC. Used by visitors and local businesses.
#penola	7,933	Promoted by Penola Coonawarra Visitor Information Centre. Used by visitors, photographers, visitors, local businesses.
#visittatiara	15	Promoted by Tatiara District Council. Established 2020.

Tourism Experience Sentiment

What visitors are saying online about a destination is a key indicator on the performance of products and the wider destination experience as a whole, and indicator of advocacy of the Region.

Desktop research on TripAdvisor, Google and Instagram can provide some indicative insights into visitor sentiment. The insights below are purely qualitative, and they lack quantitative measurement of sentiment and likelihood of future advocacy.

Overall, current sentiment for a snapshot of tourism experiences across the region analysed are very high (mostly 4+ star), and comments regarding the assets are very positive, with only a few negative comments. However, it's noted many tourism businesses, and visitor assets owned and managed by LGAs in the Region are lacking promotion to encourage online advocacy for their experiences.

Given that word of mouth marketing is the most trusted form of advertising, a key opportunity for the region will be to upskill tourism operators in delivering exceptional experiences to drive advocacy for their businesses. Additionally, supporting tourism operators in strategies and tactics on how to encourage and leverage visitor advocacy is also key in being able to market their own experiences, and the region as a whole.

Table 20 - Online Visitor Sentiment for Key Tourism Experiences in the Limestone Coast Tourism Region

		TripAdvisor		Google		Instagram	
Product / Experience	Product Category (Activity / Attraction)	# Reviews	Rating	# Reviews	Rating	#Hashtag	# Uses
Tatiara District Council							
Padthaway Caravan Park	Accommodation	42	4.5	50	4.6	#padthawaycaravanpark	14
Bordertown Caravan Park	Accommodation	40	3	105	3.8	#bprdertowncaravanpark	1
Walkway Gallery	Attraction	N/A	N/A	7	4.7	#walkwaygallery	629
Sadie House B&B	Accommodation	N/A	N/A	N/A	N/A	#sadiehousebnb	26
Keith Motor Inn	Accommodation	83	4	92	4	#keithmotorinn	2
Henry & Rose	Café/Restaurant	280	4.5	372	4.5	#henryandrose	293
Keith Bakery	Café/Restaurant	109	4.5	206	4.2	#keithbakery	30
Bordertown Wildlife Park (White Kangaroo Park)	Attraction	N/A	N/A	61	4.3	#bordertownwildlifepark	9
Don Mosley Park, Keith	Attraction	10	5	37	4.7	Nil	
Kingston District Council							
Cape Jaffa Wines	Attraction	89	4.5	19	4.5	#capejaffawines	473
Big Lobster	Attraction	144	3.5	519	4	Nil	
Cape Jaffa Lighthouse Museum	Attraction	45	4	48	4.3	#capejaffalighthouse	181

		TripAdvisor		Google		Instagram	
Product / Experience	Product Category (Activity / Attraction)	# Reviews	Rating	# Reviews	Rating	#Hashtag	# Uses
Jip Jip Conservation Park	Attraction	N/A	N/A	3	4.7	#jipjipconservationpark	1
Bliss Kingston	Café / Restaurant / Retail	61	4.5	80	4.8	#blisskingstonse	2,229
The Crown inn	Hotel/Motel/Restaurant	48	4	189	4.4	#thecrowninnkingston	2
The Granites	Attraction	11	3.5	5	5	#thegranites (not dedicated)	698
Kingston Foreshore Caravan Park	Accommodation	29	4	222	4.2	#kingstonforeshorecaravanpark	1
Lacepede Bay Motel	Accommodation	174	3.5	100	3.9	Nil	
District Council of Robe							
Robe Yacht Club	Café/Restaurant	N/A	N/A	3	4.3	#robeyachtclub	12
Little Dip Conservation Park	Attraction	4	5	14	4.1	#littledipconservationpark	368
Sea Vu Caravan Park	Accommodation	145	4.5	230	4.5	#seavucaravanpark #seavucaravanparkrobe	382 125
Robe Marina Accommodation	Accommodation	5	4	27	4	Nil	
Lakeview Motel	Accommodation	446	4.5	66	4.4	Nil	
Woodsoak Wines	Attraction	1	5	5	4.8	#woodsoackwines	277
Robe Town Brewery	Café/Restaurant	58	5	26	4.5	#robetownbrewry	405
The Project Robe	Café/Restaurant	379	4.5	256	4.4	#theprojectrobe	124
Adventurous Spoon	Café/Restaurant	343	4.5	215	4.6	#adventurouspoonrobesea	3
Mahalia Coffee	Café/Food Producer	60	4.5	273	4.5	#mahaliacoffee	2414
Wattle Range Council							
Rymill Coonawarra	Attraction	117	4.5	12	4.8	#rymillcoonawarra #rymillwinery #rymillwines	332 303 75
Upstairs at Hollicks	Café/Restaurant	251	4.5	51	4.6	#hollicks #Hollickswinery	207 37
Tantanoola Caves	Attraction	234	4.5	343	4.7	#tantanoola #tantanoolacaves #tantanoolacave #tantanoolacavesconservationpark	722 818 121 34
Lake George	Attraction	N/A	N/A	6	4.8	#lakegeorgebeachport	23
Mary McKillop Interpretive Centre	Attraction	75	4.5	68	4.7	#marymckillopmuseum	5
Pipers of Penola	Café/Restaurant	317	4.5	53	4.8	#pipersofpenola	201
Royal Oak Hotel	Café/Restaurant	60	4	58	4.6	#royaloakoenola	143
Beachport Caravan Park	Accommodation	88	4.5	221	4.5	#beachportcaravanpark	12

		TripAdvisor		Google		Instagram	
Product / Experience	Product Category (Activity / Attraction)	# Reviews	Rating	# Reviews	Rating	#Hashtag	# Uses
Chardonnay Lodge	Accommodation	52	4	39	4.1	#chardonnaylodge	306
Naracoorte Lucindale Council							
Naracoorte Caves National Park	Attraction	530	4.5	733	4.5	#naracoortecaves #naracoortecavesnationalpark	2,389 228
The Sheep's Back Museum	Attraction / VIC	40	4.5	35	4.7	#sheepsbackmuseum	7
Naracoorte Regional Art Gallery	Attraction	6	4.5	6	3.2	#naracoorteregionalartgallery	4
Big 4 Naracoorte Holiday Park	Accommodation	183	4	251	4.2	#naracoortebig4holidaypark	3
Billy Mac's Bistro	Café/Restaurant	126	4	N/A	N/A	Nil	
Sweet Espresso	Café/Restaurant	32	4.5	80	4.4	Nil	
Naracoorte Country Retreat	Accommodation	N/A	N/A	N/A	N/A	Nil	
Naracoorte Swimming Lake	Attraction	36	4.5	29	4.4	#naracoorteswimminglake	125
Naracoorte Saleyards	Attraction	N/A	N/A	8	4.4	#naracoortesaleyards	2
Lucindale Country Club	Accommodation	N/A	N/A	7	5	#lucindalcountryclub	3
Black Cockatoo Bush Camp	Accommodation	27	4.5	19	4.7	#blackcockatoobushcamp	18
District Council of Grant							
Ewens Pond	Attraction	22	5	12	4.3	#ewenponds	175
Port MacDonnell and District Maritime Museum	Attraction	7	4.5	21	4.2		
Periwinkles Cafe	Café / Restaurant	163	4.5	282	4.4	#periwinklecafe	109
The Bay Pizzeria	Café / Restaurant	32	4.5	83	4.7	#thebaypizzeria	135
Cape Northumberland Lighthouse	Attraction	7	4	29	4.6	#capenorthumberland	389
Dingley Dell Conservation Park	Attraction	6	4	N/A	N/A	Nil	
Extreme Marine Charters	Attraction	1	5	3	5	Nil	
Pines Hotel	Accommodation	N/A	N/A	60	4.6	Nil	
Mount Gambier Airport	Transport Service	N/A	N/A	15	4.3	#mountgambierairport	34
City of Mount Gambier							
Mount Gambier Farmers Market	Attraction	10	3	4	4.5	#mountgambierfarmersmarket	74
The Old Mount Gambier Gaol	Attraction	224	4.5	152	4.7	#theoldmountgambiergaol	284
The Barn Accommodation	Accommodation	675	4.5	327	4.5	#thebarnaccommodation	4

		TripAdvisor		Google		Instagram	
Product / Experience	Product Category (Activity / Attraction)	# Reviews	Rating	# Reviews	Rating	#Hashtag	# Uses
The Blue Lake	Attraction	1,468	4.5	126	4.6	#thebluelakemountgambier (#thebluelake also being used, but global used at other locations)	34
Umpherston Sinkhole	Attraction	1,262	4.5	3,175	4.6	#umpherstonsinkhole	6,064
Commodore on the Park	Accommodation	268	4	297	4.1	#commodoreonthepark	131
Metro Bakery + Cafe	Café / Restaurant	641	4.5	590	4.6	#metrobakeryandcafe	1,008
Sorrentos Cafe	Café / Restaurant	320	4	434	4.1	#sorrentoscafe	19
Blue Lake Holiday Park	Accommodation	217	3.5	390	4.2	#bluelakeholidaypark	32

9.4 LCLGA Marketing Initiatives

The below table (Table 22) offers a high-level review of the of the regional specific marketing initiatives undertaken by LCLGA.

Table 21 - Limestone Coast LGA Marketing Initiatives Snapshot

INITIATIVE	INVESTMENT
Trade Marketing	<ul style="list-style-type: none"> The LCLGA Tourism Development Manager participated in a number of tradeshow promoting the region in 2019/2020, attending ATE19, Australia Marketplace India, SE Asia, SATC America's Roadshow, ATEC SA B2B Event, Corroboree West and ATEC Meeting Place. LCLGA have applied for trade shows in UK in the past, and haven't been accepted. The objective at these events was to increase understanding of the region's product and experience profile, encouraging 2 night stays, and educational elements including geographical size, location and distance to capital cities. Measurement on impact at these trade shows is long-term and difficult to measure The LCLGA Tourism Development Manager regularly liaises with inbound ready tourism operators, offering support and guidance ATEC Branch Chair – South Australia China Marketing Initiatives – Treasure Trails Collateral
Digital Marketing	<ul style="list-style-type: none"> Website <ul style="list-style-type: none"> There are two main regional websites for the Limestone Coast – www.limestonecoast.com.au and www.limestonecoast.org.au www.limestonecoast.com.au is an industry website, designed to promote the Limestone Coast Collaborative industry group, and information regarding the Regional Branding Project. This website has not been updated since 2016 and is currently dormant. www.limestonecoast.org.au is a digital tool. It's not a traditional destination website with factual and storytelling content, rather a planning tool, based on Australian Tourism Data Warehouse listings. <ul style="list-style-type: none"> This website does not have set KPIs to measure engagement or referral to local businesses. The Google Analytics account was assessed for this website with the results available in section 9.4.1 Nil search visibility, impacting potential visitors accessing the information in relevant stages of their travel purchase journey No storytelling on either website, impacting visibility in search engines, and engagement of website content. Social Media <ul style="list-style-type: none"> There is one Regional social media account which is owned by LCLGA There are several other 'regional' social media accounts (see Table 18) Limited strategic destination marketing content, used most recently to promote the Lucindale One Night Stand Event in 2019. Nil deliberate, strategic hashtag promotion or user generated content implementation for the Region Nil measurement KPIs set or reporting of metrics 'The Limestone Coast' Facebook Page
Cross-Regional Marketing	<ul style="list-style-type: none"> Limestone Coast Interactive Trails 'Mixed Dozen' Project (details available below) Great Southern Touring Route has funds still remaining (historical co-operative project KI, Adl Hills, Fleurieu). There hasn't been any formalised cross-regional collaborative consumer direct marketing initiatives between Limestone Coast and other regions in the past 12-24 months, apart from the 'Mixed Dozen' Project
Niche Marketing	<ul style="list-style-type: none"> Adelaide Convention Bureau Membership since 2017 Limestone Coast Business Events Brochure (online)

9.4.1 Limestone Coast Wine Trails Mixed Dozen Project

Project Background

The aim of the Limestone Coast Wine Trails 'Mixed Dozen' Project was to bring together wine associations and other symbiotic organisations to build their capabilities and confidence to better target, attract and host international wine visitors.

A manager was employed to implement the project from April 2018-April 2020.

The identified project outcomes were multi-pronged from an experience development and destination marketing perspective, with objectives of:

- Identifying the region's high yielding international wine consumer persona
- Building the capacity of the industry by delivering capability training designed to create new and bolster existing wine tourism experiences suited to the requisites of the Persona
- Marketing the experiences via digital platform that informs, entices and disperses travellers across the region, ultimately increasing length of stay and depth of meaningful experience.
- Driving visitation to the digital platform via a strategic advertising campaign using media relevant to reaching the identified personas

The digital marketing assets created to support the marketing activity include a new, digital interface facilitated by Alpaca (content distribution software program) hosted on www.limestonecoast.org.au and a supporting Facebook Page <https://www.facebook.com/limestonecoastwinetrails>

The Advertising Campaign, began in February 2020 and consisted of Social Media and Search advertising, print campaigns, digital adverts, trade activity and operator briefings.

The final months of the scheduled project implementation was interrupted by significant external threats being (Bushfires and COVID-19).

Project Review

A complete Project review is available from LCLGA, however, the key highlights are below.

- A new digital itinerary planning tool for the region – www.limestonecoast.org.au – highlighting all of the great things the region has on offer
- ATDW listings increased by 9.6%
- More than 17 new bookable wine tourism experiences for the region – with a few more in production
- 6 new wine tourism itineraries (available on the web platform).
- 600 visitor surveys for visitor market research
- 130 face to face interviews (visitors and business)
- 4 regional famils with 46 participants visiting 29 businesses/attractions
- 10 mentoring program participants
- An industry toolkit to help build new tourism experiences
- A marketing plan has been developed and implementation has started and will ramp up again post COVID-19.

Digital Asset Review

A high level review of website users for www.limestonecoast.org.au was undertaken on the 7th May 2020 (using the time parameters of 1 January – 30 April), to provide insight into the performance of the website. (see Table 22 below)

As the website was launched (soft) in January 2020, the data provides reasonably unreliable insights given the low website user numbers, and therefore increased potential for highly skewed results.

Given that the project success was interrupted by external influences (bushfires/COVID-19) the potential for the digital platform to achieve its objectives was limited.

However, there is significant opportunity to leverage the investment in the asset to further develop the website into a performance based destination marketing tool by:

- Publishing storytelling and helpful factual destination content on the website to drive increased visibility and referrals from search
- Setting up relevant KPIs for the project, particularly as it relates to user demographics, psychographics and conversions (eg. referrals to tourism operator website, creation of itineraries)
- Setting up relevant conversion metrics (to track KPIs)
- Reviewing the URL used to represent key search query for those who have brand awareness for the region eg. visitlimestonecoast.com.au (available to purchase as at 7th May 2020)

The Facebook Page that was established to support the website has had no activity posted on it since it was published in February 2020. It was established as a vehicle to undertake the social media advertising campaign. The advertising campaign generated a number of likes for the page, in addition to organic reach.

Table 22 - Audience and Acquisition Review of www.limestonecoast.org.au

	January 2020-April 2020
# Sessions	2336
# Users	1541
# Page Views	3081
Pages per Session	1.32
Ave. Session Duration	2:56
Top Cities	
1	Adelaide
2	Melbourne
3	Sydney
Mobile Overview	
Desktop	73.53%
Mobile	42.97%
Tablet	5.64%
Mobile Visitor Average Time on Site	1:35
Traffic Sources	
Organic %	7.85%
Direct %	47.64%
Referral %	22.8%

Social %	7.66%
Email %	3.38%
Social Referrals	
TOTAL sessions from social referral	125
Facebook	97.6%
Twitter	1.6%
LinkedIn	.8%
Top Referring Websites	
1	coonawarra.org
2	m.facebook.com
3	Bottraffic.pw (spam)

Advertising Review

The Advertising campaign ran from early February 2020 through to late March with some of the planned investment put on hold due to COVID-19.

The total cost of the Advertising Campaign (consisting of Facebook Adverts, Google Adverts, Print Adverts in Adelaide Review and Qantas and ATEC) was just over \$18K, which resulted in just over 1,000 visits to the website, at a cost of \$18 per website user.

Given that the website is not tracking any KPIs, and users only visited 1.33 pages per visit, the advertising investment can only be attributed to developing Brand Awareness among certain demographics.

A full advertising report is available from LCLGA.

9.5 SATC Marketing Initiatives

In the 2019 calendar year, the South Australian Tourism Commission actively perused a variety of marketing trade and public relations activities to drive demand to South Australia, to key visitor personas in international, interstate and intrastate markets.

In 2019, the Limestone Coast received the following marketing support from SATC:

- A wide range of tourism experiences received media exposure in qualified online and offline media, and the region was a key feature in SATC's Winter Campaign (a hero multi-faced campaign based on experiences, targeting interstate and intrastate visitation).
- The Region was also a feature destination for the Spring/Summer Intrastate Campaign from September 2019-December 2019.
- The SATC also manage an always on digital marketing presence, which is underpinned by southaustralia.com, a high-performance destination website designed to drive demand and conversions to tourism operator websites. The website is supported by a sophisticated social media presence which highlights user generated content (curating content from users on social, including destinations, visitors and tourism operators) and persuasive storytelling.
- From January - December 2019, southaustralia.com¹²⁴:
 - Referred 65,647 leads to tourism operator websites via their ATDW listing (5.2% of all ATDW Leads)
 - Reported 369,769 product views of limestone Coast tourism operator listings (5.87% of all page views)

For complete reports on SATC marketing, trade and PR investment, please contact the LCLGA Tourism Industry Regional Development Manager.

¹²⁴ Data made available from SATC Marketing as at 27 May 2020

9.6 Marketed Touring Routes + Trails

Touring routes and trails are key experiences that provide access to the Region, encourage the dispersal and increased spend of visitors around the Region.

9.6.1 Melbourne to Adelaide Touring Route

At a national level, visitor travelling along the Great Ocean Road and Grampians are a key source market for visitors the Region from the interstate and overseas. Cooperative marketing projects, marketing alliances, travel trade activities and visitor collateral for the region over past and recent years have all leverage this key travelling routes, as outlined in Section 10.

While Victoria's Great Southern Touring Route is Melbourne to Melbourne itinerary focus, there is positive sentiment by Victorian counterparts to work more closely on Melbourne to Adelaide Touring Route projects.

9.6.2 Southern Ocean Drive

The SATC has a state-wide tourism strategy promoting key drive routes that link the state's best tourism experiences (see southaustralia.com¹²⁵).

Of the touring routes developed and marketed by the SATC, the Southern Ocean Drive traverses through the Limestone Coast Region and has the potential to offer visitation growth opportunities for the Region with enhanced marketing.

9.6.3 Southern Australia Touring Route Inc. (SATR)

The South Australia Touring Route (SATR) is an incorporated body better known as the Melbourne to Adelaide Touring Route, was a group of organisations that agreed through an MoU dated 2007 to cooperate with respect to the promotion and development of touring between Melbourne and Adelaide and Adelaide to Melbourne.

The project management was delivered by SATR on behalf of its Stakeholders which included:

- The Southern Australia Touring Route Inc. an incorporated Association in South Australia, representing a partnership of the South Australian Tourism Commission's ("SATC") regional offices, Limestone Coast Tourism Inc., Fleurieu Peninsula Tourism Marketing Committee Inc., Tourism Kangaroo Island Inc., Murraylands Tourism Marketing Committee Inc., The Adelaide Hills Tourism Marketing Committee Inc., Adelaide Tourism Marketing Committee Inc.

Activities including a coordinated approach.

- Securing funding from Federal Government to conduct brand development and a signage audit along the entire touring route

¹²⁵Southern Ocean Drive > <http://southaustralia.com/things-to-do/road-trips>

- Coordinating development of digital and published assets plus signage along the route, the most valuable to date has been a touring map, with 2 versions in print – a comprehensive touring map and an abridged version called Adelaide to Melbourne Touring Nap – subsidized by SATC in early 2017.
- Industry development
- Attendance at Trade events under a separate banner of Melbourne to Adelaide Touring Route
- Working with the trade to advance the awareness and build commercial business along the touring route for tourism operators,
- Employed a part-time project manager.

In 2016, the SATR which had diminished in stakeholder contributions agreed to outsource the project management and administration to LCLGA through a formal agreement.

The M2A promotion was picked up in the trade and promotion work through the “Priorities To Grow the Visitor Economy” strategy and has been imbedded in the Limestone Coast Mixed Dozen project too (see section 9.4.1).

In the meantime, through consumer demand and global competitiveness, there has been a resurgence of desire amongst some of the original stakeholders to re-activate the concept.

Once again, the Limestone Coast is well positioned to advance this work given our cross-border relationships with Western Districts of Victoria (Wimmera Mallee, Grampians and Southern Grampians & Glenelg Shire).

9.6.4 City of Mount Gambier Day Touring Routes

The City of Mount Gambier have developed day touring routes from Mount Gambier to promote visitor dispersal throughout the Limestone Coast. These routes are promoted via the Mount Gambier Visitor Centre and digital platforms.

Key opportunities are to develop further day touring Routes out of each of key visitor accommodation hubs in the region to drive increased length of stay, dispersal and spend.

9.7 Destination Marketing Towards 2030

To succeed in driving demand from a destination’s most valued visitor segments, a region must maximise the impact of its marketing resources (time, money and relationships). The following is a set of destination marketing principles that should guide the strategic intent and investment in marketing into the future

9.7.1 Visitor Focussed Implementation

Consumers are connected with the world around them more now than ever. They are expecting to find information about any topic, any time, online, and similarly, they confidently ignore any messages that are not of direct interest.

When it comes to purchasing travel experiences, consumers are typically using their smartphones to look for travel inspiration and helpful information, referencing many different sources, often over a long period of time, prior to departure.

Consumers are also looking for genuine connection with brands and are willing to share enough personal information to achieve a tailored experience.

Strategic marketing must reflect this new consumer, therefore the Region will need to engage marketing tactics that engage potential visitors on a deeper level, truly connecting to their needs and motivations, in a two-way communication model.

9.7.2 Advocacy is a destination's most influential marketing tactic

Travellers are influenced heavily by unbiased word of mouth recommendations.

Destination marketing tactics need to encourage visitors to share their experiences widely online and offline. Once the advocacy is shared, then tactics to leverage the advocacy are to be implemented through the collection, elevation and syndication.

Additionally, local advocacy, whereby residents become passionate word of mouth advocates for a destination, is a key tactic that will organically amplify the region's promise and has the potential to attract an increasing number of visiting friends and relatives to the region.

9.7.3 'Always On' strategic storytelling

Strategic content creation is the cornerstone of any destination marketing plan. This is because engaging content has the ability to inspire, inform, convince and convert potential consumers at all stages of the travel purchase journey.

Consumers are now 'always-on' via their digitally connected devices and so must be the approach to destination marketing.

The region will need to focus on sharing messages on experiences, rather than selling specific products via campaigns, and tactics geared to develop a relationship with potential customers over a longer period of time will be identified to deliver these messages to customers.

9.7.4 Destination Marketing is Experience Development

The experience that a destination delivers is the most important promotional tool, as this is what drives highly trusted visitor advocacy for a Region. It is because of this understanding, there is shift in the thinking behind the role of destination marketing organisations, from a typically, traditional 'promotional' model of operation, toward experience development.

This change toward bolstering the visitor experience from the ground up is more effective as a marketing tactic, because improving product ensures better visitor experiences, and therefore is the most effective way to super-charge positive word-of-mouth in a Region¹²⁶.

¹²⁶ The 4 P's of Marketing for Destinations, Destination Think, <https://destinationthink.com/four-ps-marketing-destinations/>

10. Visitor Servicing

This section provides an overview Visitor Servicing in the Region, in addition to future best practice Visitor Servicing, and current Visitor Servicing initiatives and outcomes within the Region.

Key Findings

The Limestone Coast is home to 7 Accredited Visitor Information Centres (AVICs) and 2 Visitor Information Outlets (VIO). Whilst all Centres and Outlets are receiving excellent reviews and feedback with regard to the quality of their servicing within their Centres, their capture rate (the number of visitors serviced in comparison to the total number of visitors) is very low.

This suggests that the majority of visitors to the Region are not calling into the Visitor Centres/Outlets and therefore will be either finding their information via alternative sources, such as online, or through word of mouth by locals once they are in the Region.

Given the significant investment required by Local Government, the Region needs to shift from a Visitor Centre focus to a Visitor Servicing focus, to ensure they are supporting the Region's high yield visitors with visitor information, when and where they expect to find it, instead of expecting them to physically visit a VIC/VIO.

Other specific Visitor Servicing challenges identified through consultation highlighted:

- There is very limited online visitor servicing (live chat, responding to review, social media management, blog article writing) or outreach Visitor Servicing (roving ambassadors, attending events, pop up VIC) outside of City of Mount Gambier
- Staff lack the skills to adequately evolve and implement Visitor Servicing to include online activities
- A lack of whole of Region visitor collateral, such as a Visitor Map
- A lack of centralised and consistent reporting across Region's Visitor Centres key metrics
- A lack of formal collaboration/governance across the Region's Visitor Servicing teams

While there are many challenges, there is very positive sentiment and willingness by Visitor Servicing teams to better collaborate within the Region. Therefore, great potential exists for the Councils to collaborate more formally on Visitor Servicing across the Region, to align their visitor servicing and actions to meet the needs of the Region's High Yield Visitor and Niche Markets/Interest Groups

Specific key opportunities include:

- Develop a Regional Visitor Servicing Action Plan, identify key whole of region projects/actions and project owners from the Region's Visitor Servicing teams, aligning to the Region's High Yield Visitor and Niche Interest/Markets needs
- Ongoing implementation and potential expansion of the Guides of Mount Gambier initiative around the Region
- Implement centralised reporting of all key visitor stats (door traffic and online visitor servicing)
- Expand of outreach, digital and intra-regional visitor servicing
- Improve alignment, branding and storytelling of the Region's visitor collateral
- Support/advocate an Intra-Regional Local Resident, Business and Community Visitor Servicing Advocacy program. Initiatives to such as Shop Local, Be a Tourist in your Own Town, Local Discounts at Key Attractions (VFR Incentives), Visitor Collateral for Rate Payers and New Residents

10.1 Visitor Servicing Beyond Covid-19

Accredited Visitor Information Centres (AVICs), and the value they contribute to their region's visitor economy, is a consistent challenge that many States and Regions in Australia are currently reviewing, especially post COVID-19 shutdowns, changing visitor markets and expectations.

AVICs are a significant cost line in an operating budget for Local Governments, with return on investment notoriously hard to measure. Research reports and case studies highlight Visitor Centres can be a key driver of regional dispersal and spend if they commit to evolve and innovate their business models to be agile and responsive to changing visitor and industry needs.

10.1.1 Visitor Servicing Research

South Australia's most recent research on the impact and role of regional AVICs to the South Australian tourism industry in studies in 2011¹²⁷ and 2012¹²⁸. While there are some relevant insights for the Region, the dramatic change in travellers' path to purchase over the last 8 years and expectation of being able to find visitor information online, means this research is now not relevant for the Region.

More recently, Victoria invested in a 'Victorian Accredited Visitor Information Servicing Survey'¹²⁹, which investigated how accredited AVICs influenced visitors yield and length of stay. The report has some key insights for consideration at a state level for South Australia and its tourism regions.

Key insights from the December 2018 report found that visitors who visited an AVIC:

- 93% of visitors visited attractions or places that they otherwise wouldn't have
- \$132 is the average additional amount spent per respondent as a result of visiting the AVIC
- 1 in 5 visitors stayed longer in the region as a result of the AVIC
- 83% predicted they would do extra activities or go to new places as a result of their visit to the AVIC

Visit Victoria also produced a Visitor Information Centre Analysis of international and domestic visitors who visited an AVIC, which provide insights into the different usage of AVICs.

The following insights were identified:

- 18.1% of international overnight visitors to Victoria visited a AVIC, although this proportion declined 3.0 percentage points compared with the previous period.
- Only 6.4 % of domestic overnight and 2.7% daytrip visitors to Victoria are likely to go to a VIC in Victoria, but daytrip visitors' propensity to visit an AVIC has remained relatively stable.

¹²⁷ https://www.tra.gov.au/tra/2016/documents/srr/DVS_SRR_SA_Regional_Visitor_Information_Centres_WEB_FINAL.pdf

¹²⁸ https://www.tra.gov.au/ArticleDocuments/185/SRR_SA_The_role_of_VICs_in_distributing_tourism_product_FINAL.pdf.aspx?Embed=Y

¹²⁹ <https://www.vtic.com.au/wp-content/uploads/2019/01/VIS-Survey-Results-Half-Yearly.pdf>

10.1.2 Visitor Servicing Industry Best Practice

While the previous research studies highlight the value AVICs can bring to a region, it's important to note that there is no one size fits all approach to Visitor Servicing.

The 'A National Perspective on Visitor Servicing' report showcases recommendations and case studies on what constitutes 'Best Practice' visitor servicing by using examples of what regions are doing around Australia.

From a regional perspective, recommendations to guide Local Government in the future are summarised below and can be read in full in Tourism eSchool's blog articles '12 Things Successful Visitor Centres Do Differently'¹³⁰.

- **“Visitor Servicing” not “Visitor Information Centre Focused”.** Successful AVICs understand their centre is one of many touch-points that visitors are accessing to learn more about how to experience the destination. They know the expectation that Visitors all come into their Centre is a dated and broken model.
- **Online visitor servicing is embraced** – They support the key online touchpoints of their region's identified high yielding customer segments (and potential customers) who prefer to find their information online. This includes online review management, provision of visitor information via online messaging and chat, online distribution of all visitor collateral and support/management of relevant regional website.
- **Location Focused.** Unless they are co-located with an attraction or located in a high traffic visitor area, visitor numbers will continue to fall.
- **Outreach Visitor Servicing.** They don't limit their visitor servicing to their physical centre, but where relevant offer mobile visitor servicing around a region to key visitor hot spots (such as events/local markets etc), roving ambassadors, mobile booths. Non-accredited visitor information outlets are also investigated as alternative, lower cost options for visitor hot spots in a region.
- **Address Market Failure.** Where private business hasn't filled a product gap, they step in to provide a product offer for visitors. Guides of Mount Gambier is an excellent example of this.
- **Resident, Retailers and Service Providers are engaged.** They understand how important residents, retail traders and supporting service providers are when it comes to influencing visitors to their region. They work with all local partners for brochure distribution and invest in proactive activities to growth word of mouth advocacy from everyone living + working in the region.
- **Measure + Report the right metrics.** They don't just measure traditional reach metrics (such as visitors through the Visitor Centre door), but also expand measurement to include:
 - Visitor Centre Engagement
 - Centre dwell time
 - Sales: online, retail, in-person sales'
 - Advocacy + Sentiment: What people are saying about their Centre
 - Online Engage Engagement Metrics
 - Download + engagement with digital visitor guides/maps/fact sheets
 - Online Bookings and/or Retail Sales
 - Engagement metrics of online platforms they have influence over (eg Facebook Engagement, Instagram Engagement, Website Engagement)
 - Local Community/Industry/ Events Engagement
 - Events attended

¹³⁰ <https://tourismeschool.com/blog/12-things-successful-visitor-centres-do-differently/>

- Growth in database of local residents
 - Engage/Conversion metrics with newsletters
 - Local engagement on FB posts in community groups etc
- **Financially Sustainable Focus.** Multiple streams of income are developed, and they test and tweak what works based on their resources and their local industry. Revenue streams can include.
 - **Industry Contributions.** Via their Industry Prospectus, such as having brochures racking. Where resources are available, they also provide fee-for-service support, such as helping with ATDW listing set up, Google My Business and TripAdvisor Training.
 - **Booking Commission.** Via Online Bookings, Face to Face Bookings, Event Tickets, Bus Tickets, Owned Product Packaging + Distribution
 - **Retails Sales + Gift Packages.** Sold either offline (in VIC, at Events) or online via their Website.
 - **Own Product Sales.** Entrance Fees, Own Tour Products (only where market gaps exist) such as Guiding Service (groups), Hire, Transport, Walking Tours
 - **Advertising Opportunities.** In Centre - Posters, Window Projections, Touchscreen, Print.
 - **Venue Hire.** If they have venue space, hire it out for local events.

10.2 Visitor Servicing Performance

Following is a summary of the Region's Visitor Servicing activities, with a full overview available in Table 23 (late in this section).

10.2.1 Accredited Visitor Information Centres + Visitor Information Outlets

Seven Accredited Visitor Information Centres (AVICs) are located in the Region, and are located at Mount Gambier, Beachport, Bordertown, Millicent, Naracoorte, Penola/Coonawarra (Penola) and Robe. Visitor Information Outlets also support visitors in Port MacDonnell and Kingston.

The Visitor Centres range from a full-service visitor servicing hub at Mount Gambier, to co-location with local art galleries, museums, council offices/libraries and community centres.

All Centres provide face-to face visitor servicing 7 days a week (varying hours), sharing both their own and operator's brochures and information for the Region.

Strategy and Measurement

The Centres had varying levels of strategic direction. Some have their own Business Plans, while others aligned their activities to the wider 'Priorities to Grow The Visitor Economy 2020' (LCLGA's most recent Tourism Strategy).

It has been identified there is a lack of strategic alignment for the Visitor Centres activities to the touchpoints of the Region's potential markets (see Section 9.1.2). Other than City of Mount Gambier, the Centres operate on the traditional visitor servicing model where they expect visitors to come to their Centres.

WRC invested in a Visitor Servicing Review in early 2020 and looking to implement many of their recommendations, so of which are related to improving the strategic operation of their three Visitor Centres.

Staffing and Funding

The Centres all have different resourcing mix, with Full-Time, Part-Time and Casual paid staff, as well as reliance on volunteers, depending on their size and location staffing requirements.

The Visitor Centres/Outlets rely on Local Government funds for the majority of their operating costs. However, many supplement their funding with retail sales. A few Centres also receive commission from bookings (both in person and online) through National Park entry fees.

The Visitor Centre Experience

The experience Visitors have at each Centres is varied.

Mount Gambier overhauled their Visitor Centre experience during 2018/2019 to improve the customer experience, further making the Centre an attraction in its own right. Their new Virtual Reality experience, which was soft launch early 2020 pre COVID-19, invited visitors to engage virtually with Cave Diving, which is a unique experience for visitors.

They also have retail products helping visitors take the Blue Lake experiences home, such as “Blue Lake Water” and “Blue Lake Candles”. They are also the only Centre that proactively undertakes outreach visitor servicing activities, such as roving/outreach visitor servicing around Mount Gambier and events, and also facilitating Guides of Mount Gambier tours through training of locals to develop/run guiding experiences. Their location near District Council of Grant attractions sees them supporting this council’s tourism experiences through their visitor servicing activities as well, such as the maintenance of a brochure rack at the Mount Gambier Airport.

Naracoorte, Millicent, Penola, Port McDonnell and Bordertown are co-located with local museums/art galleries, which offer visitors local interpretation of the history and heritage of the towns.

Robe, Beachport and Kingston are co-located with council libraries, which can make it harder to attract visitors to visit in their own right. However, all centres where receiving reviews, do receive very positive sentiment from their visitors (refer to Table 24).

Accreditation

While the Region currently supports 7 accredited visitor centres, a couple of Councils expressed they may drop accreditation for their Visitor Centres during stakeholder engagement, as a way of saving costs.

While there is still a strong desire from visitors to source and find local, personalised knowledge of a destination, Visitor Centres aren’t the only custodians of this information. In addition to a Visitor Centre, destinations can also service visitors through their local businesses and residents. Therefore, the review of the accreditation, especially in light of COVID-19 Visitor Centre shut-downs would be relevant for some of the Councils in the region.

Collaboration

Visitor Centres in the region are part of the Limestone Coast/Western Victoria Visitor Information Providers Group. This group meets once a year for 2 days of training, meetings and famils. The group alternate hosting between South Australian and Victorian Visitor Centres, with Robe the planned host in November 2020, subject to COVID-19 restrictions.

At the intra-regional level, there are no other formal of collaboration and channels for Visitor Centres. While senior council management sit on the Limestone Coast Tourism Management Group (see section 3), there are opportunities at a visitor servicing level for more intra-regional communication and cooperation across visitor servicing activities.

This is a major opportunity that was identified specifically also by City of Mount Gambier and had it on their list of actions to implement in the near future. Formalised, regular intra-regional gathering of Visitor Centre teams, both in person and virtually, would provide opportunity to better collaborate and coordinate visitor servicing activities for the whole region, such as visitor collateral development and distribution, special projects, digital visitor servicing and consistent visitor data capture and reporting.

Visitor Collateral + Distribution

Regional Visitor Guide

The Limestone Coast Region is the only South Australian region not to produce their own Official Visitor Guide. Production was ceased in 2016 after a business case was agreed by the LCTMG due to:

1. Falling Advertising Revenue. The Official Visitor Guide had increasing costs each year due to commercial operators and individual councils or organisations in the Region with brochures satisfying this space, specifically “Stay Another Day”
2. Resources. The development of the Official Visitor Guide required 6 months of staff time which was unfeasible based on human resourcing in the Region.

However, feedback from Industry across the region is they see this as a major challenge, especially when visiting key arrival points to the state, and seeing all other SA Visitor Guides, but not Limestone Coast.

Partially filling this gap, the “Stay Another Day - South Australia’s Limestone Coast and South West Victoria”, which is managed by local media/advertising agency. Feedback from City of Mount Gambier is this is the most popular guide in their Visitor Centre, followed by their own town guides and map.

Whole of region Visitor Collateral has still been developed, such as the Melbourne to Adelaide Touring Route Map. However, this collateral is developed with a focus on international markets, and used as a motivational brochure more than information brochure for use at international trade shows. However, feedback from Visitor Centres in Victoria is that when copies are available it has strong pick up by Visitors in VIC Centres and receives very positive feedback by consumers.

Council Visitor Collateral

In recent years, each Council has produced their own town trails/flyers/event factsheets.

Naracoorte Lucindale Council and City of Mount Gambier both produce a stand-alone Visitor Guide for their municipality. While these guides focus on experiences in their Region, they do also have some suggested

itineraries for the wider the Limestone Coast. Other Councils have factsheets/flyers focusing specifically on their Councils towns/attractions.

Visitor Collateral Branding

When viewing the Region's visitor collateral as a whole, there is limited reference to their location within the Limestone Coast and no use of the Limestone Coast Regional branding (see section 9). This is possibly symptomatic on the cessation of producing of the Limestone Coast Regional Guide.

Distribution

Each organisation who produces visitor collateral has their own distribution plan. Therefore, there is adhoc and non-coordinated visitor collateral distribution around the region, and may be missing out on key visitor touchpoints, such as accommodation and cafes/restaurants in the region.

Mount Gambier Airport

Since September 2019, City of Mount Gambier has managed a small brochure rack at the Mount Gambier Airport, which is stocked with brochures from each of the Councils. With upgrades to the Airport, opportunity exists to expand the brochure rack and visitor servicing space, such as regional maps and imagery. This is a project that should be viewed at a regional level with involvement with other Councils in the region for input.

Collateral Review

A major opportunity for the region is a visitor collateral branding, content and distribution review, with the opportunity to better align visitor collateral to the Regional brand, share more stories and editorial that will resonation to the region's growth markets and be distributed where/where visitors expected to find them, such as at key businesses and visitor hotspots in the Region.

A whole of region visitor map is a specific, unifying collateral opportunity for the Region. It could be use by Visitor Servicing teams across the Region, interstate and in wider South Australia to help visitors forward plan their stay in the Region, therefore encouraging additional length of stay.

Digital Visitor Servicing

Digital visitor servicing is proactive support for visitors who are in their planning, pre-travel and in destination phases of their travel purchase journey to the Region, providing the right information online through channels such as social media, direct messaging channels, website live chat and online review listings.

While all Visitor Servicing teams had an online presence via their Council or dedicated visitor websites, only a couple have dedicated visitor facing social media channels, one provides live chat services and only a couple are proactively responding and encouraging online reviews of their Centre and community / council managed visitor experiences. Some of the Councils didn't have the fundamentals of a Google My Business or TripAdvisor listing for the Centres.

While still early days, a potentially significant consumer change post COVID-19 is the expectation that brands are available to support visitors through various digital channels, as they were during the COVID-19 Crisis.

This therefore presents an important opportunity for visitor servicing activities across the Region to better support visitors before and during their visit to the region in the online space, which is currently missing in many of the Councils.

Another key opportunity the digital visitor servicing capability and skills development across the region, so visitor servicing teams can better align, leverage, collaborate and support the wider digital marketing and digital visitor servicing activities in the Region.

Visitor Centre Results

Consumer insights collected on the Visitor Centres identifies a high level of satisfaction across all visitor Centres to the Region (refer Table 24). However, the collective capture rate of the Centres is very low. This is the percentage of visitors through a Centre compared to the total number of visitors to the region. Mount Gambier has the highest capture rate of 3.2%, while the other Centres have averaging around 0.8 - 1%. This highlights the major challenge that the current visitor servicing activities are only supporting a small number of the Region's total visitors.

Measurement and reporting of success by most of the Visitor Centres is still the traditional model of tracking and reporting only the number of visitors serviced through their Visitor Centres. A couple of Centres also track and measure the number of visitors supported through online visitor servicing activities (refer Table 23). Wattle Range Council has the most advanced reporting using Microsoft Share-Point software, which records data from visitors on length of stay, source markets, traveller type, visitor numbers and enquiry type.

Inconsistencies were also found in the data provided by the Visitor Centres and those statistics reported on by SATC. It's also important to note that for the Visitor Centres co-located with other Council services (such as libraries), the accuracy of attributing every person through the door as a visitor is also a challenge. Therefore, the Visitor Number data provided is an indicator only.

The low capture rate, coupled with the increase in digital information adoption by visitors, presents a key opportunity to review visitor servicing across the whole region, looking for opportunities to better service visitors where and where they expect it, such as through local tourism experiences, local residents, local service providers and online through the Region's website and social media.

A centralised reporting dashboard, where all Visitor Centres report monthly on the their key visitor servicing metrics is another key opportunity for the region, to support and showcase the wider value their services are bringing to the Region's visitor economy.

COVID-19 Impact

COVID-19 saw the closure of all the Region's Visitor Centres/Outlets during from late March – early June 2020. Many staff were re-deployed to support local charities, while volunteers were stood down. Some Centres shifted their focus to supporting local towns and communities and keeping them informed of what was open for business.

The closure of the Centres exposed the challenge of relying on the traditional visitor servicing model which expects visitors to physically visit a Visitor Centre. The rapid digital adoption by consumers through COVID-19 of online content consumption and online shopping are opportunities for visitor servicing teams both upskill in digital visitor servicing and better engage with visitors in the online space where and where they expect

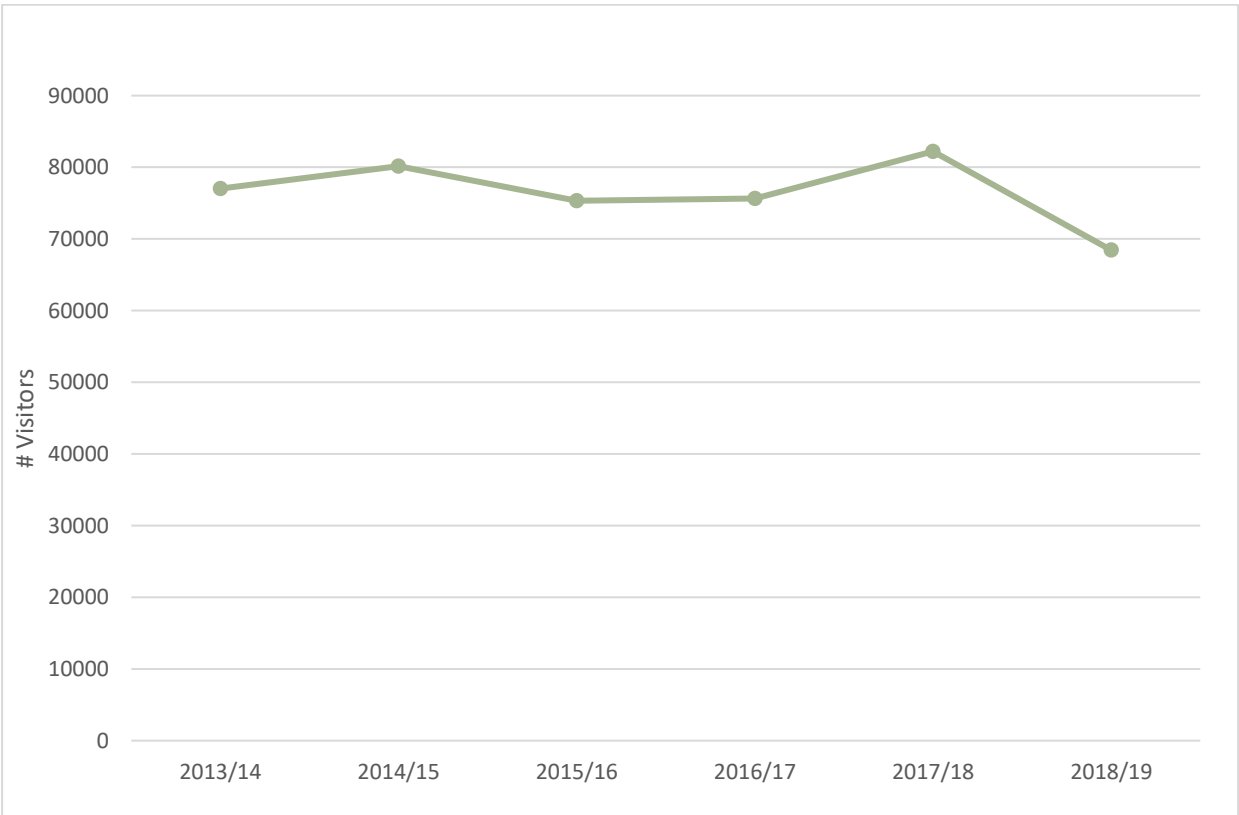
them to be. The strong positive sentiment for supporting local businesses during the shutdown also is a key opportunity for visitor servicing teams to continue to support/promote local businesses to both local residents as well as visitors.

Finding the time to get out of the Centres to network/catch up with other Visitor Centres and also industry is a challenge. However, the COVID-19 shutdown also demonstrated that online video conferencing was an effective way for teams of people in different locations to work collaboratively across diverse geographic locations. Therefore continuing to use online meeting software will be a great ongoing opportunity for visitor servicing staff to grow their intra-regional, intrastate and interstate visitor servicing collaboration and for industry engagement and training activities.

10.2.2 AVIC Visitation Statistics

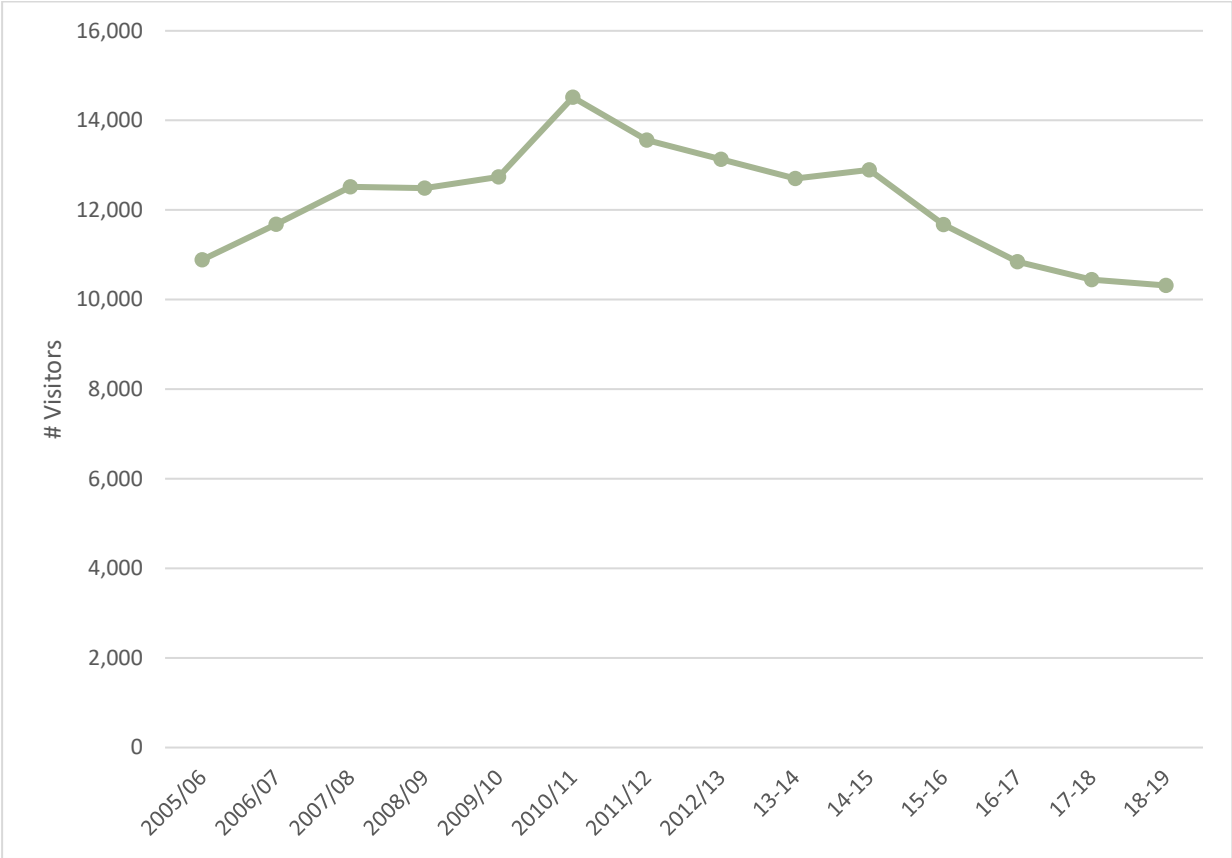
Following is an overview of available historical Visitor Centre Visitor data from City of Mount Gambier, Wattle Range Council and Naracoorte Lucindale Council.

Figure 31 - City of Mount Gambier Visitor Centre Door Numbers (Financial Year 2013 – 2019)



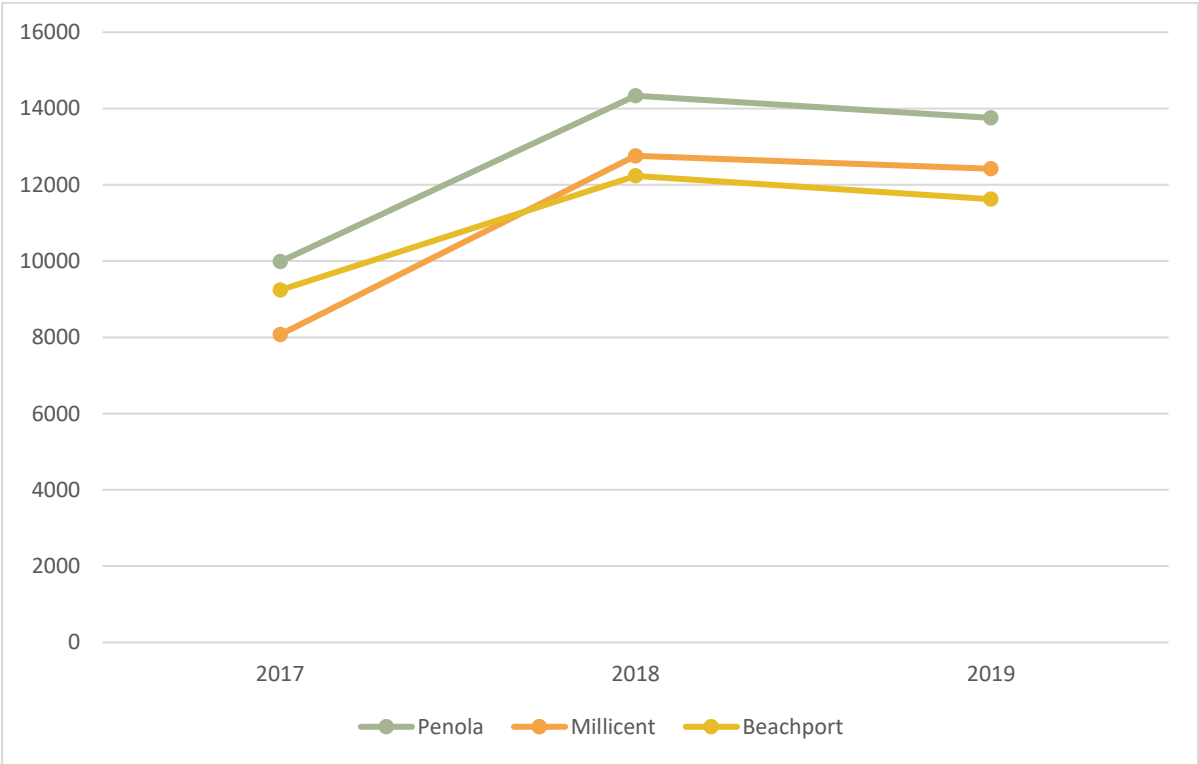
Data Source: City of Mount Gambier

Figure 32 - Naracoorte Visitor Information Centre Numbers (Financial Year 2005 – 2019)



Data Source: Naracoorte Lucindale Council

Figure 33 -Wattle Range Council Visitor Centre Numbers (Calendar Year 2017 – 2019)



Data Source: Wattle Range Council

10.2.3 Visitor Servicing Overview

Table 23 - Overview of Limestone Coast Councils Visitor Servicing Activities and Capture Rate as at June 2020

COUNCIL	NAME	DETAILS	STAFF	STRATEGY	COLLATERAL	ONLINE LISTINGS + REVIEWS	WEBSITE + SOCIAL MEDIA (Refer Table 18 for full details)	MEASUREMENT	DOOR TRAFFIC CAPTURE RATE 2017/2018 * SATC provided statistics
Mount Gambier City Council	Mount Gambier Visitor Centre (VIC)	Stand alone. Interactive regional exhibition, including new VR experience. Maintains a Mount Gambier Airport Brochure Rack	2 FTE, 4 PTE, 2 Casual, Volunteers as needed as needed	Yes.	Yes – Town Guide, Map, Factsheets	Yes – ATDW, TA, GMB Managing Reviews - Yes	Website – Dedicated to Visitors, Inc Live Chat Social Media –Yes	Visitor Numbers Phone Enquiries Digital Reach (No engagement)	3.19%
District Council of Grant	Port MacDonnell Community Complex (VIO)	Co-located with Maritime Museum, Library, Banking and Council services	1 FTE, 4 Part Time, Volunteers (20 hrs) – between all council services in building.	Servicing Visitors already in region, encourage to stay longer and spend more. No formal strategy.	Yes – Town Map, Trails/Factsheets Advertising for town in wider regional guides.	Yes – ATDW, TA, GMB Managing Reviews - No	Website (part of Council Website). City of Mount Gambier support via their Visitor facing Website.	Satisfaction of Visitors in the Region and Regional Attractions.	NA
Wattle Range Council	Penola Coonawarra Information Centre	Co-Located with Gallery and Historic displays.	All 3 VICs having a mix of FT, PT, casuals and volunteers and vary subject to seasonal demands.	Yes. External VIC review just completed (March 2020). Awaiting copy once Council reviewed. (May 2020)	Yes – Trails/Factsheets Advertising for town/VIC in wider regional guides.	Yes – ATDW, TA, GMB Managing Reviews – Some	Website (part of Council website)	Extensive Visitor Stats <ul style="list-style-type: none"> Length of stay Contact Type – VIC visit, phone, email, After Hours Pack. Number of Visitors Visitor Type (Group/Individuals) 	Penola 1.10%
	Millicent Visitor Information Centre	Co-Located with National Trust Museum							Millicent 0.95% Beachport 0.89%

COUNCIL	NAME	DETAILS	STAFF	STRATEGY	COLLATERL	ONLINE LISTINGS + REVIEWS	WEBSITE + SOCIAL MEDIA (Refer Table 18 for full details)	MEASUREMENT	DOOR TRAFFIC CAPTURE RATE 2017/2018 * SATC provided statistics
	Beachport Visitor Information Centre	Stand-alone Visitor Centre						• Where they are from (Country/State)	
District Council of Robe	Robe Visitor Information Centre	Co-Located with Library	Part Time - 4 days, Casuals cover other 3 days.	Yes	Yes – Trails/Factsheets Advertising for town in wider regional guides	Yes – ATDW, TA, GMB Managing Reviews - No	Website (part of Council website) Social Media – Via Robe Tourism Association (IG/FB)	# Visitors to Centre/Online Nil online metrics	Not Available – incomplete data
Kingston District Council	Kingston (VIO)	Co-located with Library.	Mix of Council Staff	No. Aligned to Community Plan.	Yes – Town Map, Trails/Factsheets Advertising for town in wider regional guides.	Yes – ATDW, GMB No – TripAdvisor Managing Reviews - No	Website (part of Council website)	TBC	NA
Naracoorte Lucindale Council	Naracoorte	Co-Located with National Trust Sheep's Back Museum	Mix of Part Time and Casuals.	No. Aligned to LGLCA activities	Yes- Own Visitor Guide, Trails/Factsheets. Advertising for town/council experiences in wider regional guides	Yes – ATDW, TA (Sheep's Back Museum), GMB No – TA (Visitor Centre) Managing Reviews – Some (Sheeps Back Museum on TA)	Website (under Council Website) Social Media – Yes	#Visitors through the Centre. Nil online metrics	0.72%
Tatiara District Council	Bordertown	Co-located with Library, Walkway Gallery, Cinema/Theatre, Conference Centre + Hawke Exhibition	Weekdays –Pool of 8 FTE/PT staff. Weekends - 1 – 3 Staff. No Volunteers.	Yes. Fluid though, based on key stakeholder needs.	Yes – Town Guides, Factsheets	Yes – ATDW No – TripAdvisor, GMB Managing Reviews - No	Website – Dedicated to Visitors.	TBC.	NA

10.2.4 Visitor Centre Sentiment

Following is a summary of sentiment by visitors to the Visitor Centres around the region.

Table 24 - Limestone Coast Visitor Centres Visitor Sentiment as at June 2020

COUNCIL	NAME	TRIPADVISOR				GOOGLE MY BUSINESS		
		Number of reviews	Rating out of 5	Position	Sentiment	Number of reviews	Rating out of 5	Sentiment
Wattle Range Council	Penola Coonawarra Information Centre	73	4.5/5	3 out of 20	Positive sentiment for staff, and also for adjacent Museum.	38	4.6	Very positive sentiment of staff, many enjoyed the bonus surprise of the museum.
	Millicent Visitor Information Centre	14	4.5/5	3 out of 10	Positive sentiment for staff, and also adjacent Museum.	42	4.6	Positive sentiment, great staff. People enjoyed the museum.
	Beachport Visitor Information Centre	19	4.5/5	5 out of 14	Mainly very positive sentiment around helpful staff.	33	4.6	Very positive sentiment of staff and VIC services.
District Council of Robe	Robe Visitor Information Centre	14	4.5/5	9 of 22	Very positive sentiment on staff and information provided.	3	3.3/5	Mixed feedback on staff – however very low review number.
Kingston District Council	Kingston Visitor Information Outlet	NA	NA	NA	NA. No listing on TA	1	5	Friendly staff, good visitor info.
Naracoorte Lucindale Council	Naracoorte Visitor Information Centre & Sheeps Back Museum	40	4.5/5	2 out of 31	Very positive sentiment of staff and experience	38	4.6/5	Very positive sentiment of staff the the Museum experience.
District Council of Grant	Port Macdonnell Community Complex and Visitor Information Outlet	25	5/5	2 out of 14	Very positive sentiment for staff and for the Maritime Museum.	1	5	NA
Tatiara District Council	Bordertown - VIO	NA	NA	NA	NA. Couple of listings for Bob Hawke Gallery.	8	4.4	Reviews pointing back to old VIC, not current VIC.
Mount Gambier City Council	Mount Gambier Visitor Information Centre	126	4.5/5	4 out of 23	Very positive sentiment for staff and Centre being a must do attraction.	433	4.5	Very positive sentiment of staff and centre experience.

11. Visitor Economy Stakeholders

In addition to the LCLGA there are other stakeholders in the Region whom also invest significantly in the tourism sector, including the seven constituent councils.

Each of these stakeholders implement various destination management and marketing activities, which are mostly not aligned to other stakeholders within the Region. There are, however, projects that some stakeholders are working on together, but these are mostly driven by the LCLGA (eg. Limestone Coast Wine Trails Project, see Section 7).

The information in Table 25 (below) is a snapshot of the current investment of tourism management and marketing activity for the Limestone Coast Tourism Region. There is notable cross over at a regional level as it relates to consumer marketing and visitor servicing which was expanded on in Section 9.

Table 25 - Snapshot of Tourism Management and Marketing delivery in Limestone Coast Tourism Region

	MARKET RESEARCH	CAPITAL INVESTMENT IN TOURISM PRODUCT AND INFRASTRUCTURE	PROVISION OF FUNDING FOR TOURISM PROJECTS	DEDICATED TOURISM HUMAN RESOURCE (PROJECTS)	MARKETING INTRASTATE	MARKETING INTERSTATE	MARKETING INTERNATIONALLY	PHYSICAL VISITOR INFORMATION SERVICES	DIGITAL VISITOR INFORMATION SERVICES	EVENT MANAGEMENT	MANAGE TOURISM PRODUCT	INDUSTRY DEVELOPMENT
Tourism Australia	Y						Y		Y			
South Australian Department for Environment and Water (DEW)	Y	Y	Y								Y	
South Australian Tourism Commission (SATC)	Y				Y	Y	Y		Y			Y
South Australian Government Department of Planning, Transport + Infrastructure (DPTI)		Y	Y									
Tourism Industry Council of South Australia												Y
Regional Development Australia Limestone Coast			Y		Y	Y	Y					Y
PIRSA	Y		Y									Y
Forestry SA	Y	Y	Y	Y							Y	
Limestone Coast LGA	Y		Y	Y			Y					Y
City of Mount Gambier		Y	Y	Y	Y	Y		Y	Y	Y	Y	Y
District Council of Grant		Y	Y								Y	Y

Wattle Range Council		Y	Y	Y	Y			Y		Y	Y	
District Council of Robe		Y	Y	Y	Y	Y		Y		Y		
Kingston District Council		Y	Y		Y			Y		Y		
Naracoorte Lucindale Council		Y	Y		Y			Y		Y	Y	
Tatiara District Council		Y	Y		Y			Y		Y		Y
Limestone Coast Collective			Y									Y
Local Tourism Organisations					Y	Y						
Local Business / Progress Associations and/or Town Committees					Y	Y		Y		Y	Y	Y
Tourism Businesses		Y			Y	Y		Y	Y	Y	Y	
Limestone Coast Communities					Y	Y				Y		
Limestone Coast Neighbouring Regions							Y	Y	Y			

11.1 Federal Government

11.1.1 Austrade and Tourism Australia

Austrade's role in Australia's tourism industry is to develop policy, attract investment and provide research to grow Australia's tourism market share.

Tourism Australia is the Australian Government agency responsible for attracting international visitors to Australia, both for leisure and business events. The organisation is active in 15 key markets and activities include advertising, PR and media programs, trade shows and industry programs, consumer promotions, online communications and consumer research.

Tourism ministers from the Australian and state and territory governments have identified four policy priorities under Tourism 2020, the national strategy to grow the tourism industry. These are to:

- encourage high-quality tourism experiences, including Indigenous tourism
- limit the tax, red tape and other regulatory burden industry faces
- undertake coordinated and effective marketing campaigns to drive demand
- work with industry to support the development of tourism infrastructure that can drive demand.

Austrade, in conjunction with Tourism Australia, are currently developing Australia's next national long-term tourism strategy. Development is occurring in cooperation with state and territory governments and the tourism industry. While Government has not formally announced a name for the new strategy, for ease of reference development work is being carried out under the heading of Tourism 2030.

Austrade, in cooperation with state and territory tourism organisations around Australia, held a series of workshops in September-November 2019 with key industry participants in each state and territory to help identify key priorities for the Tourism 2030 strategy.

It is anticipated that the new Tourism 2030 Strategy will commence in January 2021.

11.2 Department for Environment and Water

The Department for Environment and Water (DEW) aims to help South Australians conserve, sustain and prosper.

DEW drive the sustainable development of South Australia's natural resources and heritage, to deliver economic prosperity and a vibrant and healthy society.

DEW manage South Australia's national parks, botanic gardens and heritage places for their intrinsic value and for people's benefit and enjoyment now and into the future.

They are an authority on the state's environment and natural resources, helping community, industry, and government make good long-term decisions.

DEW have adopted four complementary roles:

- A facilitator of community involvement in and taking responsibility for the environment.
- A steward of the state's natural resources to enable sustainable development.
- The custodian of public parks, gardens, heritage places and Crown lands for public benefit and enjoyment, and for their intrinsic value.
- An authority on the state's environment and natural resources to help governments, businesses and individuals make good long-term decisions.

DEW are the operators of many of the Limestone Coast visitor experiences (Refer Section 5) via the National Parks, and its network of Conservation, Game, Regional Reserves and Crown Lands, and also key investor in Bush Camping in the region (section 5.4)

11.2.1 Parks 2025

Parks 2025 is a new strategic document developed by DEW, and is a collection of investment initiatives designed to help build the capacity of parks across our state to conserve our natural landscapes and wildlife, boost the state economy and strengthen local communities.

This investment at a statewide level will also help build resilience for nature-based tourism and broaden the attraction of South Australia to visitors from around the globe.

Specifically, it will enable:

- the creation of the Southern Flinders Ranges National Park
- development of a world-class Ediacara Fossil Experience
- a reinvigorated Cleland Wildlife Park
- a revitalised Ikara-Flinders Ranges National Park
- opportunities for businesses and organisations via a Nature-based Tourism Co-investment Fund
- new infrastructure and enhanced visitor experiences as part of the Kangaroo Island Fire Recovery.

The Nature-based Tourism Co-investment Fund is a pilot grant program under the Parks Strategy that is designed to assist eligible businesses and organisations to partner with the South Australian Government to deliver sustainable, quality tourism experiences in South Australia.

The \$5 million Nature-Based Tourism Co-investment Fund is part of the \$22 million Parks 2025 strategy and will provide the stimulus and support that businesses need to activate or build on existing ecologically sensitive tourism offerings in the state's national parks, reserves, botanic gardens, and Crown land.

The fund is open and will be available until June 2022 and is a major opportunity for Limestone Coast Tourism Operators to further activate visitor experiences. However, leveraging this fund to activate major, game changer, conceptual projects will require a whole of region, community-led approach to conceptual and business planning and modelling.

11.2.2 Nature Base Tourism Strategy

DEW have recently released a strategy and action plan which outlines the State Government's vision and actions to make South Australia a world leader in nature-based tourism, while supporting the ongoing conservation of our State's natural and cultural heritage.

The strategy offers opportunities to further develop experiences that are sustainable, have potential for growth and have proven demand. These include developing:

- Standout walking journeys across the landscape
- Unrivalled native wildlife experiences close to Adelaide
- Immersive marine wildlife experiences without equal
- Cutting edge sensory experiences that leave a lasting impression.

The action plan includes five themes:

1. Lead South Australia's nature-based tourism activation agenda
2. Support existing nature-based tourism experiences and create new ones
3. Remove red tape and barriers to investment
4. Raise awareness of South Australia's unique appeal
5. Empower and build the capacity of community-based tourism networks.

11.2.3 SA Heritage Tourism Strategy

In September and October 2019, the DEW sought input from those involved in the tourism industry and heritage sector to help develop a heritage tourism strategy and action plan that maximises the economic value of heritage and contributes to growing the South Australian visitor economy to \$12.8 billion by 2030.

The input provided is being used to inform the development of a heritage tourism strategy and action plan for South Australia. A Heritage Tourism Alliance, comprising representatives of key stakeholders from across the tourism industry and heritage sector, has been formed to work with DEW to develop the strategy and action plan.

It is envisaged the final strategy and action plan will be released in mid-late 2020.

Given the Limestone's Coast's hero strengths revolve around its natural and heritage assets, a strong relationship with DEW is imperative to ensure they are managed sustainably, from a visitor economy perspective.

11.3 South Australian Tourism Commission

The South Australian Tourism Commission (SATC) is South Australia's peak tourism organisation responsible for implementing the South Australian Visitor Economy Sector Plan 2030. The SATC works closely with regional tourism bodies to build regional brands, to increase domestic and international visitors to Adelaide and the regions, and to provide information and support to regional tourism boards and businesses.

The SATC is responsible for:

- Providing leadership for industry and government for the collective ownership and achievement of the outcomes in the South Australian Visitor Economy Sector Plan 2030
- Fostering collaboration among industry, business and Government
- Driving demand for South Australian experiences - Direct to consumer marketing, public relations and famils, and digital marketing and facilitation (see Section 9.5 for investment in the Limestone Coast Tourism Region).
- Supporting the timely sharing and provision of research and insights that support good decision making by all stakeholders in the industry
- Working closely with aviation partners and other key access and transport stakeholders, such as Cruise Lines, to maintain and grow capacity and ease of access
- Improving understanding of the tourism industry's contribution to South Australia's economy
- Facilitating cooperative marketing
- Working with industry stakeholders (private and government) to support the development of demand driving experiences
- Supporting the industry's ease of access to external business support programs, grants and other opportunities for industry development and investment
- Working closely with regions, industry associations and partners to grow tourism across the whole State.

11.3.1 South Australian 2030 Tourism Plan

In August 2019, the SATC launched the South Australian Visitor Economy Sector Plan 2030. This plan sets a bold ambition to grow our visitor economy to \$12.8 billion by 2030 and generate an additional 16,000 jobs.¹³¹

The Tourism Plan 2030 suggests that while the Visitor Economy for South Australia in 2030 may look vastly different to today, much of the core proposition for travel will likely remain the same. Travellers will still be seeking out high quality immersive or relaxing experiences with friendly customer service that represents good value for their tourism dollar. Core drawcards for South Australia are likely to remain the state's established strengths across key areas such as food and wine, nature-based tourism and cultural experiences.

It's essential that the regional strategy align with the State's tourism strategy, to ensure all initiatives can be leveraged at a regional level.

¹³¹ SATC Tourism Plan 2030 > <https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>

11.3.2 South Australian Regional Visitor Strategy 2020

In May 2018, the South Australian Regional Visitor Strategy was launched highlighting key strengths, future potential priority areas for each of the State's tourism regions, which are all focused on achieving the state's 2020 target.¹³² The implementation will be led by the Regional Visitor Strategy Steering Committee and has the potential to grow the state's regional visitor expenditure from \$2.6 billion to \$3.55 billion by 2020.

As at September 2019, the SATC reported that the Regional tourism 44% of the State's total visitor expenditure was spent in Regional SA, equating to \$3.45billion in expenditure, therefore already achieving over 97% of the RVS goal of \$3.55billion by 2020. The Second Progress Report (October 2019) for the Regional Visitor Strategy also highlighted that a number of the projects identified within the Strategy are in progress and well on the way to completion.

A revised Regional Tourism Strategy will begin consultation phase in the second half of 2020.

A strong and open relationship with the SATC is an imperative for the Region. As outlined in 4.1.3, SATC provides annual resources which co-funds a human resource (together with LCLGA) to administer set activities on behalf of state government.

Opportunities to work with the SATC on developing tourism experiences and aligning and supporting marketing initiatives will be key opportunities for the Region.

11.4 Department of Planning, Transport and Infrastructure

The Department of Planning, Transport and Infrastructure (DPTI) works as part of the community to deliver effective planning policy, efficient transport, and valuable social and economic infrastructure.

There are numerous departments in DPTI which the region will need to be in regular liaison with depending on the opportunities highlighted by the regional tourism stakeholders.

Specifically, the Limestone Coast Councils are in constant contact with the SA Boating Facilities Advisory Committee (SABFAC) with regard to the improvement of the boating facilities along the coast.

Additionally, close liaison with DPTI with regard to wayfinding signage requirements for the region will also be an important ongoing relationship.

11.4.1 SA Boating Facility Advisory Committee

The SA Boating Facility Advisory Committee are a subset of the Department for Infrastructure and Transport and are responsible for managing the collection of a 'Facility's Levy' from all registrations, inspections or surveys of vessels.

Levy monies are used for establishing and improving boating facilities in South Australia's coastal and inland waters, including:

- boat ramps;

¹³² SA Regional Visitor Strategy - <http://tourism.sa.gov.au/research-and-statistics/strategies/south-australian-regional-visitor-strategy>

- temporary mooring facilities or wharves;
- channel improvements;
- aids to navigation; or
- 24/7 emergency VHF marine radio services.

Local councils and large community organisations can apply for funding contributions from the Fund towards eligible projects, provided a commitment is given to accept on-going ownership, operation and maintenance of the facility. The annual allocation for 2018/19 to 2021/22 towards these projects is \$2.1M.

Funding assistance can be provided at up to 80% of the total project costs depending upon the strategic importance of the project when assessed against the SA Boating Facilities Strategic Plan.

SABFAC are currently working on the following projects in conjunction with the relevant Limestone Coast Councils:

- **Beachport Boat Ramp - WRC.** Resurface and formalise parking and traffic movements at the Beachport boat ramp car and trailer park.
- **Donovans River Wharf - DCG.** Replace the existing landing structure with a floating pontoon.

11.5 Tourism Industry Council of South Australia

The Tourism industry Council of South Australia (TiCSA) is a not-for-profit organisation with over 900 members. Established in 2009, TiCSA is the peak body for South Australia's tourism industry and has two primary objectives – advocacy and business development.

Members have access to networking events, training workshops and business development programs. As the voice of tourism, they advocate on behalf of their members to create a unified voice on the issues and opportunities facing the industry.

Members also receive the latest industry news and connections to other tourism professionals.

TiCSA is an important stakeholder for the development and advocacy of tourism operators within the Region, with members based in the Region.

11.6 Local Government

The Councils within the Region play a significant and diverse role in developing the region's visitor economy.

The base infrastructure and core amenities that are enjoyed in communities by visitors are largely the product of the work of local government, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services. The work of Local Government not only directly impacts the visitor's impressions and experiences in a destination, but Local Government also plays a critical role in engaging the community and creating positive social outcomes.

Each of the seven Councils in the Limestone Coast play a slightly different role in their local visitor economies, with their commitment to the visitor economy outlined in Section 4.2.

Through consultation, it was identified that there is a relatively low level of awareness across Local Government of the current and potential value of the Visitor Economy and best practice destination management and marketing for the Limestone Coast.

Additionally, consultation highlighted that the red tape and council requirements are sometimes prohibitive to following through with visitor experience initiatives.

In saying this, consultation with Councillors and Senior Executive Staff of the Councils shared many exciting opportunities for their parts of the Region's visitor economy. They also share common sentiment to invest in the enhancement of the visitor economy for their local economies and for the region as a whole, as long as it's strategic and investment can be quantified.

A major opportunity for the Region will be to ensure all Councillors and Executive Staff at the seven councils are educated on the current and potential value the visitor economy to the sustainability of their local economies.

It will be important moving forward that the Councils work collaboratively and strategically on projects that require a whole of region approach (eg. Marketing, Visitor Servicing, Events, Experience Development, Collaboration, Communication) as this will ensure efficiencies in human and monetary resources and maximise the return on investment in the visitor economy.

11.6.1 Limestone Coast Local Government Association (LCLGA)

Working to the LCLGA Charter, the Association motivates, advocates and represents its seven constituent Councils to advance cooperation, strategic partnerships and governance arrangements that oversee programs and projects in the region.

Through its coordination of effort, the Association leads and assists its councils with evidence-based approaches to high level planning, communication and representation.

The LCLGA works closely with its major regional partners including Regional Development Australia Limestone Coast (RDALC) the Limestone Coast Landscape Board (LCLB), the Local Government Association SA and Australian and State Governments.

Limestone Coast Regional Growth Strategy

The LCLGA is working towards the LC Regional Growth Strategy, which highlights that a well-coordinated, collaborative, and strategically focused effort can set the Limestone Coast region on the path to deliver a 20% lift in economic performance, adding \$700 million in growth annually and more than 5,700 new jobs by 2026. It provides the evidence base, priority areas for focus, strategic directions, and potential actions required to give leaders confidence setting off on a path together towards a brighter economic future.

These priorities include:

- Invigorate the working age population, by attracting and retaining more people across the region to fill key skills gaps and support vibrant and sustainable regional communities;
- Building on the region's competitive advantage in agribusiness;
- Capturing employment opportunities in growing sectors like healthcare and social assistance;
- Supporting the development of a vibrant business ecosystem;
- Region-wide collaboration to develop a more coordinated tourism market; and
- Securing investment to deliver regional infrastructure priorities enabling growth.

The development of this Destination Management and Marketing Strategy for the Limestone Coast Tourism Region is a key project of this Strategy.

As noted in section 4, LCLGA is the lead agency for the visitor economy.

11.7 Limestone Coast Neighbouring Tourism Regions

As noted in Section 5, the Limestone Coast is situated between the South Australian Murray River, Lakes and Coorong tourism region, and the Victorian Great Ocean Road Tourism Region and Grampians Tourism Region.

Murray River, Lakes and Coorong

The Murray River, Lakes and Coorong tourism region attracted an average of 1,278 million domestic (overnight and daytrip) and international visitors combined, who spent \$184m in the year ending September 2019.

The MRLC region has many synergies in tourism experiences with the northern part of the Limestone Coast region, from the Mallee and the Ramsar Convention listed Coorong National Park to the wild beaches. This alignment and proximity invites a collaborative approach to working together on consistent marketing themes and campaigns, as well as teaming up on relevant product and experience development opportunities where they exist.

Great Ocean Road

The Great Ocean Road (GOR) tourism region received approximately 6.8 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$1.5 billion in the year ending September 2019.¹³³

Tourism is a significant economic beacon for the GOR region, representing 15.4% of the region's economy, with the industry generating 17.6% employment. With domestic overnight expenditure in the GOR growing 10.8% year on year, domestic day trip expenditure increasing by 18% from the following year, and international visitation growth of 12.3% from the following year, flow on visitation from this region would present a significant opportunity for the Limestone Coast.

Grampians Region

Similarly, the Grampians Tourism Region received approximately 2.5 million domestic (overnight and daytrip) and international overnight visitors combined, who spent an estimated \$463 million in the year ending September 2019.¹³⁴

Visitor numbers are increasing to the Grampians from domestic markets (overnight 5.4%, daytrip 3.5%), albeit their spend has dropped by 14.2% (overnight) and 4% (daytrip). In saying this, the international market is performing very well for the Grampians with visitor numbers growing to 56,000 (up 10.7% from previous year) and expenditure estimated at \$25 million, which is an increase of 96.3% year on year.

Whilst the domestic market seems to have plateaued for the Grampians, the international market is seemingly buoyant, which could be a great opportunity for the Limestone Coast.

Given that the experience profile of the Grampians (Big nature, hiking and glamping, waterfalls wildflowers, wineries etc) and the Great Ocean Road (Nature, active adventure, surf and saltwater wellness, beaches) is

¹³³ Great Ocean Road, Regional Tourism Summary, YE September 2019
(https://www.business.vic.gov.au/_data/assets/pdf_file/0009/1844883/Great_Ocean_Road_Regional_Summary_year_ending_Sept_2019_FINAL.pdf)

¹³⁴ Grampians, Regional Tourism Summary, YE September 2019
(https://www.business.vic.gov.au/_data/assets/pdf_file/0008/1844882/Grampians_Regional_Summary_year_ending_Sept_2019_FINAL.pdf)

well aligned with that of the southern half of the Limestone Coast, collaborative marketing opportunities could be identified to leverage to support both regions.

Grampians Tourism and Great Ocean Road Tourism are already working collaboratively already on the Limestone Coast Mixed Dozen Interactive Trails Project and have indicated positively on the opportunity to collaborate on new initiatives in the future.

11.7.1 Cross Border Victorian Councils

Neighbouring Councils in Victoria also play a key role in supporting the growth of the Limestone Coast Visitor Economy. Key councils include:

- Glenelg Shire Council
- Hindmarsh Shire Council
- West Wimmera Shire Council
- Southern Grampians Shire Councils

With the major arrival into the region for Interstate and International visitors via the Great Ocean Road and Grampians regions, the cross border collaboration with these councils are major opportunities in areas of partnership marketing, visitor servicing and experience development. The impending Victorian Regional Tourism Review (due to be released late 2020) is expected to see Western Victoria become part of a RTO body based out of Ballarat¹³⁵. With the councils having more synergies with their neighbouring South Australian area of the Limestone Coast, they are therefore increasingly supportive of looking at relevant opportunities which also benefit the growth of the visitor economy in their own municipalities.

Key opportunities identified in the stakeholder engagement include

- Food, Wine and Beverage Trials – marketing + experience development
- Arts, Cultural and Heritage Trails – marketing + experience development
- Adventure tourism experience development (Glenelg Shire)
- Volcanic Experience Trail
- World Heritage Tourism – Budj Bim + Naracoorte Caves cross promotion
- Cruise ship shore excursions (Glenelg Shire)
- Visitor Servicing – famils, training, visitor collateral, cross border conference
- Visitor Collateral – Great Ocean Road/Visitor Collateral

¹³⁵ <https://engage.vic.gov.au/regional-tourism-review>

11.8 Regional Development Australia Limestone Coast (RDALC)

RDALC a regionally based, not for profit organisation that, in collaboration with industry, community and governments, facilitates and supports regional economic development and jobs growth.

RDALC is a partnership between the Federal, State Government and Local Governments to develop and strengthen the Limestone Coast regional community.

These three levels of government have invested in RDALC to deliver economic development services in the Region.

Specifically, RDALC supports the region by offering:

- Investment Attraction and Regional Information
- Industry Development and Investor assistance
- Access to business services and growth strategies
- Career development and human resource planning
- Skills training access
- Workforce planning and development
- Advocacy and business case development for regional infrastructure and investment
- Community consultation and facilitation

11.8.1 RDALC Infrastructure Audit and Priority Project Analysis

In 2018 Regional Development Australia – Limestone Coast (RDALC) commission the Regional infrastructure Audit and Priority Project Analysis for the Limestone Coast Region. The Audit forms part of a new strategic growth and investment framework being supported by RDALC. The Report provides a basis for the organisation's ongoing role in regional development and investment in collaboration with local government and other partners.

The Audit identifies and assesses a range of economic and social infrastructure assets to determine:

- Comparative advantages
- Gaps and constraints including criticality
- Impediments and options for investment and / or integrated planning
- Regional priorities to support investment and sustainable development

This report details recommendations to build on and continues to support the Limestone Coast Region. Key issues highlighted in the Audit that align with addressing challenges and opportunities to grow the Region's Visitor Economy include:

- Maintenance and upkeep of Boating Infrastructure
- Areas of Coastal Erosion
- Addressing of Broadband and Mobile Coverage blackspots in the region
- The Region's Road blackspots.

Leveraging the relevant actions and stakeholders of this Strategy are a key opportunity for this Plan to address some of the Infrastructure challenges highlighted by stakeholders for growing the region's Visitor Economy.

11.9 Primary Industries and Regions SA

Primary Industries and Regions SA (PIRSA) is a key economic development agency in the government of South Australia. PIRSA's purpose is to grow primary industries and drive regional development.

PIRSA has a series of key priorities, but those that are most relevant to this project are:

- Enable market access by working with primary industries to respond to evolving requirements of domestic and global markets and consumers
- Grow regions by driving new economic opportunities and building and strengthening communities
- Manage adverse events effectively and help primary industries and communities improve preparedness, resilience and recover well

PIRSA is a partner of Adelaide's membership to the Great Wine Capitals Global Network, together with the South Australian Wine Industry Association (SAWIA), the South Australian Tourism Commission (SATC), the University of Adelaide and the University of South Australia. Through the Great Wine Capitals Global Network, a local program of activities is being delivered to build the capability and to promote all 18 of South Australia's wine regions and support the growth and development of the wine and tourism industries.

PIRSA have a full time Regional Coordinator who is responsible for implementing projects throughout the Limestone Coast Region. This Coordinator sits on the LCLGA's Economic Diversification Group committee, who are the custodians of the LC Regional Growth Plan.

They also work collaboratively with regional stakeholders, including LCLGA, Local Government, and private enterprise on various projects as it relates to their objectives, of which some are relating to the visitor economy.

PIRSA is also a funding partner, together with¹³⁶ Wine Australia and regional organisations for the Limestone Coast Mixed Dozen Wine Trails project.

11.10 Forestry SA – Green Triangle

Forestry SA – Green Triangle manage many of the Limestone Coasts natural assets including Pine Forests, Native Forests, Caves, Reserves and Recreation Lakes. They have a strong focus on development of visitor infrastructure to active these sites, such as through trails and campsites, and also manage commercial tour operators used of their natural assets such as caves. They also operate the highly successful Glow Mushroom Lane at Glencoe.

As outlined in Section 5.3.1 they are already proactively developing their natural assets for use by both communities and visitors through infrastructure, trails, and are very supportive of working with relevant stakeholders via this Plan to grow the visitor experience in their natural assets, while also looking to further grow revenue streams to support the delivery of visitor experiences via their assets.

Given the Limestone's Coast's hero strengths revolve around its natural and heritage assets, a strong relationship with Forestry SA is imperative to activate the many opportunities outlined in the plan.

¹³⁶ <https://www.forestrysa.com.au/app/uploads/2020/01/ForestrySA-Community-Forest-Management-Annual-Report-2018-19.pdf>

11.11 Limestone Coast Landscape Board (LCLB)

The Limestone Coast Landscape Board is responsible for administering the Landscape South Australia Act 2019 which is the new framework for managing the state's land, water, pest plants and animals, and biodiversity, within the Limestone Coast region.

The LCLB was established in June 2020 (taking over from the South East Natural Resource Management Board) and has representation from a group of local people who make decisions about regional investment in landscape management, derived from landscape and water levies, in conjunction with the Limestone Coast Landscape Plan.

The plan sets targets for the management of the landscape in the region, and is delivered through a diverse range of programs and projects.

The LCLB is currently finalising their 5-year strategic plan, and so opportunities exist to begin discussions with the LCLB to identify any projects that may impact/leverage/support the visitor economy.

11.12 Local Business Associations, Not-For-Profit Organisations and Town Committees

Across the Limestone Coast region, there are 24 groups identified that are mandated to improving the visitor economy in their part of the region. (See Table 26)

Activities of these groups could be the run small events, placemaking beautification projects (landscaping, town entrance signage, public art, silo art), maintaining visitor information bays, industry development workshops, manage community assets, manage town digital marketing initiatives.

There is a significant opportunity to effectively engage these groups in the development and implementation of the Destination Tourism and Marketing Plan, particularly as they have the resources and local intel to implement local initiatives to support the overall regional vision.

Table 26 - Limestone Coast Local Business/Community/Tourism Groups

Kingston SE Tourism Group	Tatiara Tourism Group
Kingston Connect	Bordertown on the Move
Beachport Progress Association	Tatiara Business Association
Mount Gambier & Districts Tourism Operators	Keith Means Business
Tourism Mount Gambier	Wrattonbully Wine Region Association
Mount Gambier Regional Winegrowers	Naracoorte & Lucindale Business and Tourism Association
Mount Gambier Farmers Market	Mount Benson Vignerons
Chamber of Commerce Mount Gambier	Robe Tourism Association
Donavons Recreational Advisory Committee Inc	Limestone Coast Food Group
The Bay Escape	Baytown Progress Association Inc
Carpenter Rocks Progress Association	Limestone Coast Mixed Dozen
Kongorong Progress Advisory Committee Inc	Limestone Coast Grape and Wine Council Inc.

Kalangadoo Farmers Market	
Tarpeena Progress Association Inc.	
Coonawarra Vignerons	
Penola & District Business & Tourism Association	
Millicent Business and Tourism Association	

11.12.1 Coonawarra Vignerons

Coonawarra Grape and Wine Incorporated (CGWI), trading as Coonawarra Vignerons is an amalgamation of the former Coonawarra Vignerons Association and the Coonawarra Grapegrowers Association. CGWI officially came into being in December 2013.

CGWI is a not for profit, membership-based organisation which supports local grapegrowers and winemakers by facilitating the promotion, marketing, technical innovation, finances and administration associated with the Coonawarra wine region membership. Integral to CGWI is protecting the integrity, and enhancing the reputation, of Coonawarra as a fine wine region.

Whilst Coonawarra Vignerons is a local association, they invest significantly in the following tourism marketing projects which have a regional approach:

- Limestone Coast Interactive Wine Trails Mixed Dozen Project – Partner
- Visitor Servicing Collateral (Visitor Guides, Maps, Brochures)
- Direct to consumer digital and offline marketing initiatives (Radio/TV/Print)
- Trade and consumer shows

11.12.2 Limestone Coast Red Meat Cluster

The Limestone Coast Red Meat Cluster (LCRMC) is a collaborative platform with resources and linkages to build on industry opportunities and address impediments for the growth of the region's red meat industry.

The red meat industry is a cornerstone of the Limestone Coast economy, so enhanced value and growth in this industry will have a significant impact region-wide.

The LCRMC is overseen by an industry-wide Strategy Group, with project working groups to implement specific actions. It has contracted a part-time Project Coordinator and a Communications Coordinator.

Their objectives include:

- enhanced value of the Red Meat industry
- improved value chain collaboration
- increased business profitability
- increased employment opportunities

The service sector in the Limestone Coast relies heavily on the red meat industry, with services such as merchandise, engineering, livestock agency, veterinary, nutrition, transport, agronomy, training and financing working in the red meat field.

Given the visitor economy is somewhat underpinned by the agricultural industry, it would be advantageous to keep lines of communication open with the LCRMC to identify any opportunities specifically with regard to Group Travel and Business Events from their sector.

11.13 Tourism Operators and Local Businesses

Tourism Operators and local businesses are the heart and soul of the Limestone Coast experience, and as such, play an important role in shaping the regional visitor economy.

Businesses and operators work with numerous stakeholders within the local and state tourism industry to assist them with experience development and marketing initiatives.

Key opportunities to engage tourism operators and local businesses to grow the regional visitor economy include:

- Assist with marketing the destination through marketing activities and delivering an exceptional experience
- Ensure businesses have the opportunities to develop their business management skills in digital marketing literacy, and experience design and delivery.
- Provide relevant networking opportunities between operators and local businesses
- Engage all local businesses in the visitor economy to grow the value of tourism in the region

11.14 Limestone Coast Communities

A good working relationship between communities and the regional tourism industry is vital for visitor economy growth. The Region will need to ensure the community is authentically consulted and regularly communicated with to raise community understanding of the value of the visitor economy to drive growth of the visitor economy inside out.

This assists:

- communities to understand why Local Government is investing in the visitor economy and how they are maximising the benefits and mitigating unwanted impacts;
- the local tourism industry to support community aspirations and achieve desired outcomes;
- to create friendlier communities and thus better visitor experiences;
- to create community advocates who provide word of mouth recommendations to current visitors and encourage their own friends and relatives to visit;
- when new development applications come before LC Councils, as the overall value of the visitor economy to the local area is better understood;
- locals to become involved in ambassador (volunteering) opportunities such as festivals and events, museums and galleries; and
- Involving the community regularly fosters greater levels of trust and provides Local Government with a higher degree of social licence to operate.

Consultation with industry highlighted some major challenges as it relates to the broader Limestone Coast Community which could impact the region's ability to collaborate effectively, including:

- Lack of understanding of the value of tourism to their towns and the greater region
- Lack of understanding of what there is to see and do from locals
- Parochialism between Limestone Coast communities
- General population don't like change or appreciate new ways of thinking

Whilst these are major challenges, they also present significant opportunities for the Region, specifically through the development and implementation of a local advocacy strategy.

12. SWOT Analysis

Throughout the consultation process (see Acknowledgements) strengths, challenges, threats and opportunities for the Region were identified. While many of these Opportunities and Challenges have been discussed already, following is a high-level snapshot of the consistent themes that were discussed, all of which will be addressed in the Strategy and Action Plan.

Table 27 - Strengths, Challenges + Threats for Tourism in the Limestone Coast Tourism Region (Pre and Post COVID-19)

STRENGTHS	WEAKNESSES / CHALLENGES	THREATS
<p>Visitor Economy</p> <ul style="list-style-type: none"> • Expenditure and visitation are growing for the region and South Australia • High market share of regional overnight visitation in South Australia • Visitation forecasts trending positively (pre-COVID19) • Steady growth in Total Tourism Employment (from 2008-2018) <p>Governance, Resourcing + Industry</p> <ul style="list-style-type: none"> • Strategic Tourism Development Program for the Limestone Coast Tourism Region implemented by dedicated FTE resource, employed by LCLGA (funded by 7 LGAs in the region) • 2030 State Tourism Plan and other state and Regional Plans developed, and ready for coordinated implementation • Local Government Organisations in the Region are committed to growing the visitor economy for the Region (highlighted in their Strategic Plans and through consultation) and are already investing in visitor economy (infrastructure, marketing, visitor servicing) • Active and passionate private businesses, industry organisations and local government all determined to grow the visitor economy <p>Visitor Experiences, Events + Product Development</p> <ul style="list-style-type: none"> • Over 450+ tourism experiences throughout the region • South Australia's only World Heritage Listed Site – Naracoorte Caves • Growing number of initiatives to preserve, revive and share First Nation Boandik and Ngarrindjeri culture • Vibrant Events calendar • Welcoming, visitor focused town/communities across the Region • Recent influx of 20+ wine tourism experiences developed (outcome from Limestone Coast Trails Project) • Growing activation of Naracoorte Caves as hero experience 	<p>Visitor Economy</p> <ul style="list-style-type: none"> • Impact on travel and travel consumer behaviour from COVID-19 (change in motivations, needs, ability to travel due to costs and restrictions) • SA Tourism 2030 strategy has highlighted 79% growth in visitor expenditure by 2030 (potentially difficult to obtain) • Real impact of COVID-19 not yet completely understood for the Region (loss of businesses, impact on employment) <p>Governance, Resourcing + Industry</p> <ul style="list-style-type: none"> • Lack of consistent networking, communication and collaboration across the destination • No dedicated budget or resources to market the Region direct to consumers • Limited understanding of 'best practice' strategic destination marketing across industry stakeholders • All stakeholders are investing in tourism in an uncoordinated way, potentially impacting on efficient use of funding • Lack of financial and human resource support for development, activation, scheduling and marketing of regional events to drive visitation • LCLGA under resourced to implement all potential opportunities to grow the Visitor Economy for the Region (additional FTE's required to support current FTE) <p>Visitor Experience, Events + Product Development</p> <ul style="list-style-type: none"> • Limited availability of commissionable product for the Region, hindering increase growth in Travel Trade and Group Tour nights/dispersal in the region, especially accommodation, tours + attractions. • Many key natural attractions are free, and don't encourage longer stays by visitors eg. Blue Lake, Umpherston Caves, Mount Shank, Bool Lagoon, National Parks 	<p>Visitor Economy</p> <ul style="list-style-type: none"> • Ongoing impacts of Global Health Pandemic COVID-19, and any other global threats such as climate change (employment/business shut down, travel restrictions, etc) • South Australian State Government funding and priorities <p>Governance + Resourcing</p> <ul style="list-style-type: none"> • All stakeholders maintain silo approach and do not work together to drive results for the region • Change in Local Government leadership and elected bodies, with less focus on the Visitor Economy • Plans are developed and actions not implemented • Change in implementation personnel in individual organisations (delay in implementation) • Change in State Government and/or SATC staff and marketing investment / product development <p>Social License</p> <ul style="list-style-type: none"> • Acceptance of tourism related activation by locals, particularly as COVID-19 restrictions ease, including hosting of larger events. <p>Natural Assets</p> <ul style="list-style-type: none"> • Natural disasters and climatic change – bushfires, coastal erosion <p>Consumers</p> <ul style="list-style-type: none"> • Changes in consumer demand, ability to travel (consumer confidence, interest rates, exchange rates etc) <p>Preservation</p> <ul style="list-style-type: none"> • Natural Assets – if not maintained, and sustainably marketed, potential for degradation and threat to sustainability

<ul style="list-style-type: none"> • Growing activation of key regional industry assets for visitors eg Forestry SA (Ghost Mushrooms), Agricultures (Mayura Station), Commercial Fishing (Charter fishing/craypot pulling) <p>Access + Infrastructure</p> <ul style="list-style-type: none"> • Location on Melbourne to Adelaide Tourism Route and capture of Great Ocean Road traffic. • Regular air connections through Mount Gambier Airport to Adelaide and Melbourne • Strong road network across the region. • Mount Gambier Airport expansion • RDALC's LC Infrastructure Audit • Local Governments ongoing investment and improvement of visitor economy infrastructure across the region. <p>Landscapes + Natural Beauty</p> <ul style="list-style-type: none"> • Abundant water - contributing to beautiful and green landscapes of the region (eg majestic gum country around Tatiara), quality green recreation facilities (eg golf courses) and strong food, agriculture and wine industries. • Number of quality National and Conservation Parks + Reserves • The Limestone Coasts unique geological features - volcanoes, craters, lakes, aquifers, swamps, caves and sinkholes. Home to the region's most iconic attractions (eg Blue Lake, Naracoorte Caves) and experiences (eg Cave Diving/Snorkelling) • Stunning coastline and stunning beaches – home to key visitor experiences and recreational activities <p>Brand</p> <ul style="list-style-type: none"> • Development of Regional Brand in 2016 • High level of awareness of the destination in South Australian market • Some awareness of the Region and specific experiences nationally and in specific international markets (eg. Western Markets) <p>Destination Marketing</p>	<ul style="list-style-type: none"> • Under activated National Assets in the region for visitors for recreational/leisure activities of walking/cycling/tours etc – Forests, Lakes, Lagoons, Caves, Volcanoes • Lack of quality 4-5 star group accommodation (Coonawarra and Mount Gambier), combined with lack of major conference venue. • Lack of investment (funds) to upgrade existing motel stock • Increasing number of empty shop fronts in towns across the region • Seasonality Opening hours • Indigenous Experiences – lack of integration of First National Boandik and Ngarrend • Aging population, less young people volunteering, impacting sustainability of volunteer run events and committees. • Attracting and retaining career focused tourism and hospitality staff in the region, which is affecting the visitor experience. This includes high cost/lack of accommodation in summer for staff (Robe) <p>Access + Infrastructure</p> <ul style="list-style-type: none"> • Aviation access – no major carrier into Mount Gambier Airport. Higher cost for luggage and lack of connectivity to global airlines, higher airfare costs. • Coastal Erosion – impacting visitor assets of boat ramps, jetties, marinas and attractions (eg Robe Obelisk) • Natural Experiences – lack of/dated facilities/signage/toilets/campsites/interpretation/signage at key Reserves/Conservation Parks/Forests/Lakes/Swamps/Caves Campsites/Trails/Reserves around the region. Eg Bool Lagoon, Kanawincka Geo Park Sites. • Broadband and WIFI blackspots in the region for visitors and local communities • Poor roads in sections of the Region • EV Charging points – lack of rapid charging stations for Mel – Adelaide travellers • Signage – key visitor facing signs needing updates 	<ul style="list-style-type: none"> • Heritage and Cultural - If these are not preserved/captured for successive custodians they will be lost <p>Competition</p> <ul style="list-style-type: none"> • Immediate competition between SA's regions for Intrastate visitation (whilst COVID-19 border restrictions in place) • Popularity of other destinations with similar product profiles both in South Australia and Australia offering a diverse experience for visitors <p>Visitor Experience</p> <ul style="list-style-type: none"> • If visitors have a poor-quality experience, then they are unlikely to return and further highly trusted word of mouth marketing (social media/review websites etc) may discourage many more to not bother.
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<ul style="list-style-type: none"> • Investment in new consumer-facing website and brand awareness campaign for the Limestone Coast Wine Regions via Limestone Coast Wine Trails 'Mixed Dozen' Project • Good level of marketing support from South Australian Tourism Commission for the region in 2018-2019 • Currently attracting a wide range of markets and niche interest and market segments • Investment in Trade Marketing activities to drive demand from key international markets (embedding brand awareness and some conversions) • On average, the region's experiences receive positive advocacy on digital review platforms used by visitors <p>Visitor Servicing</p> <ul style="list-style-type: none"> • 7 professionally managed Visitor Centres and 2 Visitor Information Outlets across the Region • Very positive visitor sentiment from Visitor Centre experiences across the Region. • Cross Border Visitor Centre collaboration • Strong Council Level Visitor collateral 	<p>Brand</p> <ul style="list-style-type: none"> • Average awareness of the 'Limestone Coast' brand in interstate and international markets (South Australians know the region as 'the South East' not necessarily 'The Limestone Coast') • No effective activation of the Limestone Coast brand, including on Visitor Collateral. • Considered a drive through destination (1-night max) from Melbourne-Adelaide, or Great Ocean Road-Kangaroo Island <p>Destination Marketing</p> <ul style="list-style-type: none"> • No dedicated resource and budget allocated to plan and implement best practice destination marketing for the Region • No formal destination marketing strategy and implementation record since 2010 No formal visitor personas and journey mapping developed for the Region • Under-activation of whole of region digital marketing assets (and no measurement mechanisms to report ROI on any investments) • Investment in trade marketing initiatives without formal measurement mechanisms in place to track ROI • Low levels of awareness of what to see and do around the region (locals, wider industry, visitors) • Under-activated visitor advocacy for experiences online (in compared to other destinations) • Varying levels of implementation of best practice digital marketing competence among tourism businesses in the region • Perception that SATC do not invest enough in marketing the region through their campaigns or as a standalone campaign proposition <p>Visitor Servicing</p> <ul style="list-style-type: none"> • Other than City of Mount Gambier, limited online visitor servicing or outreach Visitor Servicing. • Limited skills or resources to adequately evolve the Visitor Servicing to online and outreach activities • Lack of whole of region unifying collateral, such as a Visitor Map • Lack of strategic, measurable KPIs and reporting on Visitor Servicing activities 	
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	<ul style="list-style-type: none"> • Small visitor capture rate. All Centres only servicing only small % of overall region's visitors. • Lack of centralised and consistent reporting across Region's Visitor Centres Data • Lack of formal collaboration/governance across the Region's Visitor Centres 	
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Below is a list of high-level opportunities for the Limestone Coast Tourism Region

Table 28 - Opportunities for the Limestone Coast Tourism Region (Pre and Post COVID-19)

OPPORTUNITIES	
Governance + Resourcing	<ul style="list-style-type: none"> • Maintain current LCLGA governance model, review investment from each participating Council to support the implementation of the new Destination Tourism + Marketing Plan 2025 • Confirm the resourcing required to support the implementation of the Plan, all stakeholders to review investment in the visitor economy to support the implementation of the Plan. • Develop set of valid measurement metrics and mechanisms to reliably track the trajectory of the Region's visitor economy (Lobby SATC for gaps in visitor data required). • Report on the achievements of the actions within the new Destination Tourism and Marketing Plan annually to relevant stakeholders • Ensure the Destination Tourism + Marketing Plan aligns with the Regional Visitor Tourism Strategy 20205
Industry Engagement + Collaboration	<ul style="list-style-type: none"> • Establish a new Industry Advisory Group (reference group) to ensure LCLGA Tourism Management Group has connection and consultation with industry on all projects, activities (with the outcome of gaining increased engagement and uptake of activities from industry). • Engage visitor economy groups and committees in the Plan by assisting them to review their local Plans and help them to identify and integrate actions that support the achievement of the new Destination Tourism + Marketing Plan • Develop and implement a strategic 'Industry Engagement + Development Strategy', to identify mechanisms to ensure the Industry is working toward a common goal, businesses feel supported and as a result perform better, and all stakeholders are informed in an efficient and effective way. <ul style="list-style-type: none"> ○ Maintain an updated database of all industry stakeholders ○ Facilitate regular industry networking opportunities ○ Maintain and enhance the implementation of an industry communication plan, including the sharing of timely and relevant information via a regular enewsletter, management of an industry Facebook Group and implementation of regular networking events ○ Develop a rolling industry survey to gather insights into visitor demand and sentiment and business needs and sentiment. • Liaise with and work collaboratively on relevant projects with other industry sectors in the Region (eg. Investment Prospectus, Primary Industries sector organisations, eg Red Meat Cluster) • Activate collaborative marketing opportunities with neighbouring regions in SA and across the Victorian border to maximise tourism opportunities (across visitor servicing, marketing, experience packaging and other consistencies) • Ensure businesses and volunteers have access to, and engage with, tools, technologies, programs and funding to maximise their professionalism and profitability <ul style="list-style-type: none"> ○ Undertake a skills and training gap audit and develop a schedule of professional development opportunities for businesses in the visitor economy (in conjunction with RDALC, TICSAs, other Training Organisations) ○ Identify and promote programs that support businesses to transition into new markets ○ Connect relevant business and organisations with relevant grant opportunities ○ Support existing volunteer run heritage assets across the Region • Grow the tourism industry workforce <ul style="list-style-type: none"> ○ Undertake an audit to identify gaps/key challenges in labour/jobs supply for the visitor economy (eg. lack of accommodation for staff in Robe over summer) ○ Advocate for the development of programs and initiatives that provide training / work experience placement / vocational placements for secondary schools and college students and apprentices and industry-led promotions of the sector. ○ Advocate for the implementation of skill-based training opportunities to fill gaps in appropriate labour supply ○ Advocate for the development of a digital solution 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 ○ Develop a volunteering strategy to support the sustainability of volunteer workforce in the Region – visitor centre, events, historical attractions ○ Develop an industry investment prospectus (RDAMN) for major projects, entrepreneurs and SME businesses and liaise with SATC and other Government Departments to activate opportunities • Develop and implement a long-term local advocacy strategy for residents and local businesses <ul style="list-style-type: none"> ○ Develop and implement a Regional Ambassadors Program to create more local advocates in the Region ○ Publish regular editorial in local papers in with key achievements in the industry (promote the value of tourism, keep locals informed of what there is to see and do)

	<ul style="list-style-type: none"> ○ Set up / optimise regional Facebook Group for locals (learn about new news, visitor servicing questions) ○ Regional Shop/Experience Local Campaign (offering locals incentives to drive visitation from locals and VFR) ○ Advocate at a LG level for 'love your town' initiative for frontline staff... getting staff to understand their role in visitor servicing and growing the economy ○ Local User Generated Content strategy – Activate story sharing by locals ○ Develop an annual 'The True Value of Tourism' lift out for Councils to send to all residents with Rates ○ Consulta and engage the Limestone Coast community to engage them in decision making process ● Support the continued understanding of the value of tourism within Local Government <ul style="list-style-type: none"> ○ Regular presentation of achievements of the RTP2030 to elected bodies ○ Organise and facilitate familiarisations for elected members and council staff of visitor experiences
Visitor Experience + Product Development	<ul style="list-style-type: none"> ● Grow the quality of existing and quantity of new Visitor Experiences in the Region. Focusing on its experience strength and hero products that will attract the identified ideal customers + niche visitor segments and markets. <ul style="list-style-type: none"> ○ Naracoorte Caves Connection Business Prospectus ○ Expansion of Region's Trail Network – build on Regional Trails Feasibility Study ○ Advocate for further activation of region's hero natural experiences, such as the Blue Lake (Food + Beverage, Function Space, Zipline/Viewing Platforms), Umpherston Caves and National Parks, Reserves, Waterways, Forests and Caves including for identified Adventure Experience niche segments and recreational activities. ○ Advocate for State and Federal investment into activation of relevant DEW and Forestry SA projects in the region. ○ Engage with SATC and DEWR on activation of Nature Based Product Development + Heritage Tourism ○ Positive regulatory environment for experience developments – policies, insurance, banking etc ○ Continued development and enhancement for sport and recreational facilities in the Region. ● Advocate for commissionable product and where commissionable product exists, connect and collaborate to harness opportunities and provide economies of scale at trade events, etc. ● Grow the quality and quantity of accommodation in the region, including <ul style="list-style-type: none"> ○ 4/5 Star Group Accommodation for Mount Gambier ○ 4/5 Star Group Accommodation for Coonawarra ○ Increases activation of National Parks for Camping ○ SA Govt Grant funds for upgrading accommodation, such as former Tourism Development Fund ● Increase acknowledgement and inclusion of Boandik and Ngarrindjeri history and culture across the Region's visitor experiences <ul style="list-style-type: none"> ○ Confirmation and usage of native language names for key visitor sites ○ Promote Aboriginal culture and history in public places through the provision of signage. ○ Increased indigenous interpretation at key visitor experiences in the region ○ Increased indigenous interpretation on visitor collateral and websites ○ Increase supply of Aboriginal heritage experiences in the Region. ○ Leverage relevant plans to grow Aboriginal Heritage Tourism in the Region including SA Heritage Tourism Strategy, City of Mount Gambier Reconciliation Plan and other LC Council Plans. ○ Leverage the indigenous experience of newly World Heritage Budj Bim Cultural Landscape and National Park (north of Portland in Victoria) ● Advocate for and support the development of food/beverage experiences in the region, based around the region's strengths of wine/beverages, fishing, dairy, forestry and agriculture industries <ul style="list-style-type: none"> ○ LC food awareness/activation on tourism menus ○ Lobster dining/pot pulling experience ○ Advocate for expansion of LC food experiences in relevant events, such as Tasting Australia, Regional Events, and the Region's Farmers Markets. ○ Advocate and leverage media/chef coverage of food producers in the Region. ○ Advocate for use of the Limestone Coast Brand with food suppliers ○ Increase usage of Regional food producers in wider hospitality industry and food retailers in the region. ● Advocate for programs that attract, train, house and retain quality staff in the region (hospitality). ● Advocate for extended opening hours for retail shops to support visitors on the weekends and peak holiday travel periods ● Identify opportunities to attract more cruise ship visitors to the Region (pre/post and shore excursions out of Robe and Portland)
Events	<ul style="list-style-type: none"> ● Develop and implement a regional events strategy: <ul style="list-style-type: none"> ○ Undertake an events audit (current/proposed events post Covid, customer needs, pre-post touring opportunities, funding opportunities, volunteer capacity and skills, venue audit/gap analysis)

	<ul style="list-style-type: none"> Identify 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. Engage with the LC Youth in event planning. Find out what do they want in the Region and what events are they more likely to be involved in running. Advocate for activation of new events + event spaces in the region (eg Tantanoola Caves) Promotion of LC events through all the Region's Destination Marketing + Visitor Servicing activities. Increase inclusion of Limestone Coast based events in major SA Events, such as Tasting Australia, Fringe, History Week, SALA. Development of a consistent funding approach for LGAs (Application process, funding guidelines, considerations etc) 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) Activation of new event spaces in the region, including Forestry SA and DEW assets. Succession planning for events (conceptual volunteer fatigue, ongoing funding) Attract high yield Sports Events to the Region Activate relationships with relevant event organisers and associations (e.g. Adelaide Convention Bureau, Office of Recreation and Sport) Actively bid to host key sporting events that align to the Region's sporting assets. Establish a database of sporting venues and administrative groups across the region and maintain communications re: tourism related opportunities Attract high yield Business Events to the Region Activate a group of stakeholders in the Region's MICE sector to take lead on relevant MICE opportunities Provide relevant support and advocacy for the expansion of the Region's Business event venues, such as the proposed Robe Function + Event Centre development Development of a comprehensive resource guide for event managers (a one-stop-shop for event organisers planning an event in the Region), available online and for use at relevant MICE events. Continue to leverage activities around Adelaide Convention Bureau Membership Actively bid for conferences that align to the Region's conference facilities and key industry sectors and strengths.
Infrastructure + Access	<ul style="list-style-type: none"> Advocate for prioritisation of projects in the LGLCA Infrastructure Audit relevant to the visitor economy including <ul style="list-style-type: none"> Improved WIFI and mobile coverage in/around major placemaking hotspots Maintenance of coastal assets jetties/obelisk/lighthouses/marinas/sand erosion and collection Upgrades of relevant visitor road networks Advocate for local governments/ local Progress and Community Groups improve relevant visitor infrastructure in their municipalities including: <ul style="list-style-type: none"> Visitor signage around the region, including wayfinding, interpretive, directional, placemaking and tourist trails, as well as information bays. Use of Limestone Coast Brand, consistency of stories, messages and branding. Management of rubbish and cleanliness and maintenance of public toilets, especially during peak seasons. Identify/improve parking for RV/towing visitors where required Support RV travellers where market gaps existing for Overnight Camping/Dump Points Support EV travellers with regional network of EV charging points, including high capacity chargers Address any parking bottlenecks at peak season/events/locations Consider Visitor Economy impacts/opportunities with all Placemaking/Masterplans – mainstreet re-activations of empty shops, playground developments etc. Build sustainable aviation access to the Region <ul style="list-style-type: none"> Advocate for the sustainability REX as post Covid-19 travel returns. Advocate for lower excess luggage fares for visitors flying into the Region (eg Cave Divers) Via SATC, potentially pursue a second carrier into the airport – subject to growth in demand Advocate for relevant infrastructure updates are region's airstrips (eg Coonawarra Airstrip Navigation Equipment). Support the activation of Mount Gambier Airport Expansion project Advocate for Overland Train travel continue to Bordertown connect Advocate for better coach connectivity through the Region from Melbourne to Adelaide Advocate for and connect LC Regional Trails Project stakeholders with relevant grant opportunities
Destination Marketing	<ul style="list-style-type: none"> Activation of Limestone Coast Regional Brand throughout whole Region, including: <ul style="list-style-type: none"> Understand the Brand DNA for the region as a whole, and for each council area/town in the region (extensive consultation required)

- Develop accurate, consistent and compelling key messaging around the region's unique Storylines centred around the region's 'clean, green pristine' + geology/landscapes credentials along with the sub-regional stories (eg. Gold Escort Route, Mary McKillop, Maritime Heritage etc)
- Develop key storylines developed for each town/council area
- Develop storylines and other brand assets that acknowledge and highlight the Boandik and Ngarrindjeri cultures
- Develop brand kit for Industry (instructions on how industry can interpret the region's stories in their experiences/towns, how to implement the regional logo etc)
- Develop engagement strategy
- Implement brand and storytelling in Destination Marketing implementation, Visitor Collateral and Visitor Signage
- Grow the Region's visual assets database (photos/videos)
- **Develop and implement an annual Destination Marketing Plan** that includes
 - Develop a set of measurable metrics to report on the ROI of the Destination Marketing Plan to stakeholders regularly (metrics to feed up into the overarching measurement strategy for the Destination Tourism + Marketing Plan)
 - Identify and journey map the region's high yield visitor personas, niche markets and niche interest segments:
 - Local Market - Advocating for a sustainable, long term Shop / Explore Local campaign and develop a Local Advocacy Campaign - encourage locals to explore the region with VFR
 - Intrastate Market – Strategic positioning as a multi-night destination, education of VIC network
 - Interstate Market – Work collaboratively with Great Southern Touring Route, Leveraging the Limestone Coast Wine Trails project, cross regional collaboration with neighbouring interstate regions on consistent experience themes, work collaboratively with SATC
 - International Market – capitalise on investment in Limestone Coast Wine Trails Project, targeted approach to key international markets via SATC, liaise with Education Adelaide to capture VFR visitors.
 - Generational - Baby Boomers, Millennials
 - Life Stages - Families, DINKs/SINKs
 - Niche Markets – Caravan + Camping, Business Events, Sport Tourism, Group Touring, Cruise
 - Niche Interests – Adventure Tourism, Food and Wine, Agritourism, Art, Culture and Heritage
- **Identify, optimise and activate key 'Always On' marketing assets** to share the region's story with identified personas and segments:
 - Enhance and upgrade www.limestonecoast.org.au into the official destination website (to feature storytelling, and is developed to track relevant conversions as it relates to driving demand from the Region's High Yield Visitor Personas)
 - Optimise social media assets and execute the whole of destination marketing plan on these platforms
 - Develop and implement a blogging and email marketing strategy
 - Consolidate and optimise the region's hashtags to ensure effective organisation of digital advocacy
- **Implement digital and offline storytelling strategy** (via Always On and multimodal Campaigns) to drive demand from the region's high yield visitor personas, niche markets and niche interest markets, to:
 - Support visitation during low season / manage visitation in high season
 - Encourage day trip visitation from surrounding destinations (Victoria and South Australian destinations)
 - Encourage multi-day itineraries (to convert single night trips to multi-night trips)
 - Promote of regional events (seasonal and time-specific)
 - Enhance themed drive journeys across regional boundaries
- **Increase the digital footprint for Limestone Coast destination information and storytelling on third-party websites, and travel apps** (including ATDW, Southaustralia.com)
- **Actively leverage SATC marketing initiatives** including:
 - Increase storytelling of the Region in all relevant marketing activities and mediums such as southaustralia.com, social media and email direct marketing
 - To extend the Region's experience and product stories in their promotion of the 'Southern Ocean Drive' promoted and signposted Road Trip
 - All seasonal marketing campaigns (in appropriate interstate and international markets)
 - Amplify regional content via #seesouthaustralia
- **Optimise trade marketing strategy:**
 - Support relevant SATC International Marketing Activities (ensure alignment with visitor personas and demand from markets)
 - Advocate opportunities to increase Regional product and inclusions in Melbourne to Adelaide Tour Operator aligned to the region's high yield visitor segments and niche markets.
 - Identify strategic projects to grow the share of international visitors in region (ATEC, Limestone Coast Mixed Dozen Project, Tertiary Education Organisations, Treasure Trails)

	<ul style="list-style-type: none"> • Activate strategic marketing opportunities to drive demand from Niche Market Segments <ul style="list-style-type: none"> ○ Develop buyer personas and journey map touchpoints for Group Travel, Business and Sporting Events Markets ○ Develop and implement communication strategy for each Market Segment • Implement a strategic offline marketing initiatives that support the ‘Always On’ Digital and ‘Campaign’ Marketing initiatives. (eg. Families with influencers, Media and Travel Trade) • Advocate for increased digital footprint and storytelling across the Region: <ul style="list-style-type: none"> ○ Liaise with tourism marketing implementation resources (Council, VIC/VIO staff, industry organisations and private enterprise) to ensure an efficient, coordinated and effective approach to destination and sub-destination branding and messaging ○ Provide digital capability training opportunities for the industry ○ Advocate for development of strategic and coordinated marketing for key tourism assets/experiences (e.g. Naracoorte Caves with DEW) • Activate partnership/cooperative/public relations opportunities with: <ul style="list-style-type: none"> ○ Relevant brands and stakeholders to further activate niche markets and niche interest segments (e.g. Education Adelaide, Discovery Parks) ○ Brands aligned to the region’s visitor personas (e.g. Wine Brands exporting to US/China) ○ Key Media Brands (Advertiser, Today Show, Sunrise) ○ Key Access partners (e.g. REX Airlines) • Advocate for a coordinated, strategic approach to marketing and storytelling across the Region (with key experience brands, visitor economy groups)
Visitor Servicing	<ul style="list-style-type: none"> • Advocate for Visitor Servicing to be elevated as a Visitor Economy priority by Local Government stakeholders <ul style="list-style-type: none"> ○ Education of relevant LG stakeholders (Elected Members, Executive Staff + Visitor Servicing teams) on best practice Visitor Servicing ○ Confirm/clarity of all Resources/Visitor Servicing activities invested by LG across the Region. ○ Alignment of their servicing/experiences/collateral activities to the region’s High Yield Visitor Personas/Niche Markets/interests visitor servicing on and offline touchpoints. ○ More strategic Visitor Servicing focus with the development annual Business Plan, that align to relevant Council strategies and this new Tourism Plan. • Improve Collaboration, Communication and Reporting on Visitor Servicing resources across the region <ul style="list-style-type: none"> ○ Formalise a LGLCA Visitor Serving Group –Run regular catch ups (in person/online), famils, staff exchanges, and cross collaboration on relevant projects such as Regional Map ○ Develop a Regional Visitor Servicing Action Plan, identify key whole of region projects/actions and project owners from the LC Region’s Visitor Servicing teams ○ Advocate for centralise reporting of all key visitor stats (door traffic + online visitor servicing). Expansion of WRC reporting system across the Regions Visitor Centres. • Advocate for the expansion of Outreach, Digital and Intra-Regional Visitor Servicing <ul style="list-style-type: none"> ○ Professional development of skills gap in Digital Visitor Servicing ○ Outreach visitor servicing plan – For major events and key visitor hot spots/times of years ○ Western Victorian VIC and wider South Australia Visitor Centre engagement plan – famils/education/brochures/conferences (SA and Cross-Borders)/Melbourne to Adelaide Touring Map etc. • Improved alignment, branding and storytelling of the Region’s visitor collateral to the region’s High Yield Visitor/Niche Interest/Market needs <ul style="list-style-type: none"> ○ Alignment of all Visitor Collateral to Limestone Coast Brand Stories + Visual Guide (eg Council and Commercial Operator Visitor Collateral) ○ Advocate for inclusion of First National Boandik and Ngarrendjeri stories, history and culture. ○ Development of a whole of Region Map – inspirational, itineraries, experience driven (no advertising) ○ Mount Gambier Airport Activation – map/imagery/brochure racks

Acknowledgements

The Limestone Coast Tourism Region Destination Situation Analysis July 2020 has been prepared through extensive consultation with key tourism stakeholders across community, industry, business and government. Stakeholder input to the Report was gathered through the following sources during February – June 2020:

- Via 73 responses through online survey of residents, community groups, local government, industry and government staff (Feb – April 2020)
- Over 70 tourism operators and 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- September 2020).

Local and State Government	Industry	Local Community
<ul style="list-style-type: none"> • Elected Members, Executive Staff, Visitor Servicing Staff of <ul style="list-style-type: none"> • City of Mount Gambier • District Council of Grant • Wattle Range Council • District Council of Robe • Kingston District Council • Naracoorte Lucindale Council • Tatiara District Council • South Australian Tourism Commission – Marketing, Product Development • Department of Environment + Water • Department of Primary Industries + Research. • Forestry SA 	<ul style="list-style-type: none"> • Regional Development Australia Limestone Coast • Beachport Progress Association • Bordertown on the Move • Coonawarra Vignerons • Kingston Connect • Kingston SE Tourism Group • Limestone Coast Mixed Dozen • Millicent Business and Tourism Association • Mount Gambier & Districts Tourism Operators • Naracoorte & Lucindale Business and Tourism Association • Penola & District Business & Tourism Association • Robe Tourism Association • Tatiara Tourism Group • Tourism Mount Gambier 	70+ Local Residents, Business Owners, Wineries, Tourism Providers in the Region

The development of the Tourism Plan, management and execution of the stakeholder engagement was conducted by Rebecca White and Paige Rowett, Directors, Tourism eSchool (www.tourismeschool.com).

References

In addition to the references Strategies and Footnotes throughout the Plan, following is a summary of all additional resources referenced in the development of this Document.

- Expedia Generations on the Move
- Expedia Generation Alpha Research
- Chinese Free and Independent Travellers to South Australia, March 2017
- South Australian Regional Visitor Strategy
- South Australian International Wine Tourism Strategy
- SA Recreational Trails 10 Year Masterplan 2015-2025
- South Australia Visitor Economy Sector Plan 2030 – Draft for Industry Feedback
- The South Australian Bike Economy
- The camping habits and economic value of ‘free-camping’ travellers, 2017
- Tourism 2020
- Tourism Australia International Marketing Profiles
- Tourism Australia Market Profiles
- Tourism Research Australia (TRA)
- Queensland Camping Options Toolkit, March 2014