



Riverland
Tourism Plan
2020

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Australian Tourism Commission.*



Message from the Mayors

“As Mayors of the Riverland, we are proud of our region and what it offers to residents and visitors.

Tourism is a significant industry within the Riverland economy, with an annual expenditure of over \$142 million and is vital to on-going prosperity of the region. The economic impact of tourism spreads further than the direct tourism industry, creating additional social and cultural experiences in the region and supporting a greater range of economic opportunity for residents. The labour intensive nature of tourism businesses contributes significantly to local employment.

The Riverland Councils have a long history of supporting the tourism industry with the establishment of Destination Riverland providing a more focused and strategic approach to tourism marketing and development. Tourism investment requires operators to have confidence in the stability and potential growth in the region.

The partnerships that Destination Riverland has formed with the South Australian Tourism Commission, local operators, Regional Development Australia Murraylands and Riverland as well as the support of the Berri Barmera, Loxton Waikerie, Mid Murray and Renmark Paringa

Councils, provides a strong basis for them to fulfil their Strategic Plan, to continue to build the future environment of tourism business and provide a positive stimulus for visitors to the region.

We recommend the plan as a working document that convenes our regional unity of focus and purpose towards the ever increasing role that tourism plays in our regional economy”.



Mayor Peter Hunt

Berri Barmera Council



Mayor Leon Stasinowsky

District Council of Loxton Waikerie



Mayor Dave Burgess

Mid Murray Council



Mayor Neil Martinson

Renmark Paringa Council





Message from the Chairman, Destination Riverland



The Board of Destination Riverland is proud to introduce the Riverland Tourism Plan 2020 to the Riverland tourism industry and its stakeholders at a time when tourism in our region is growing.

The Riverland tourism region has the opportunity to build on its achievements and rival the great food, wine and nature destinations of the world.

Several new attractions, room upgrades, waterfront holiday options, new cruise operators, new events and luxury accommodation are signs of investment and growing confidence in the Riverland tourism industry. It is encouraging to know that the growth in visitor numbers and visitor expenditure over the last 3 years will reward this investment.

The Riverland Tourism Plan 2020 is linked to the South Australian Tourism Plan 2020 and it retains the vision adopted in the Destination Riverland Strategic Plan 2012-2015 — “Confidence in tourism investment and excellence in tourism operations”.

This plan will support the Riverland tourism industry to continue growing on current trend to generate potential expenditure of \$216 million per annum by 2020, up from \$142 million per annum today. The

plan outlines key actions to promote our diverse region and increase our marketing capability, to foster strong industry collaboration and to leverage Riverland events to keep participants here for longer.

The main foundations for this plan are the Murray River and our proud Riverland communities who create the opportunity to combine our world class food, wine, nature and cultural experiences to attract visitors.

The Board of Destination Riverland congratulates business operators, local Government and industry bodies who are investing in Riverland tourism. Destination Riverland gratefully acknowledges the unwavering support of the four Councils in the Riverland tourism region, who helped to establish Destination Riverland. Together with the strategic support we receive from the South Australian Tourism Commission, Destination Riverland is confident that this plan will deliver significant growth to our region and our State.

The Board of Destination Riverland looks forward to working with all of our stakeholders to deliver on this plan.

Peter Walker
Chairman

1. Executive Summary

The Riverland Tourism Plan 2020 will support the Riverland tourism economy to achieve potential expenditure of \$216 million per annum by 2020 and help maintain a resilient and diverse regional economy less dependent on water extraction from the Murray River.

The recent *Building the Lucky Country* report by Deloitte (2014) identified tourism as one of the five super growth industries set to drive the “post mining boom” Australian economy.

Tourism is an important driver of the Riverland economy, generating \$142 million expenditure in the region and attracting 1.18 million visitor nights per year. There are 352 tourism businesses in the region creating significant employment opportunities.

This Riverland Tourism Plan 2020 aligns with the South Australian Tourism Plan 2020 and focuses on 5 key priority areas:

1. Driving Demand
2. Creating a Collaborative Culture
3. Supporting Riverland Businesses
4. Increasing Awareness of the Value of Tourism, and
5. Using Events to Drive Visitation.

Priority actions in Driving Demand will include the development of an annual Riverland Tourism Marketing Plan, focused on experience seekers from young families, bucket listers and retired couples. The Riverland's prime target market will be South Australians. Interstate marketing activity will target Victoria and international activity will focus on New Zealand. Actions will include development of a dispersal strategy for Adelaide visitors to travel to the Riverland.

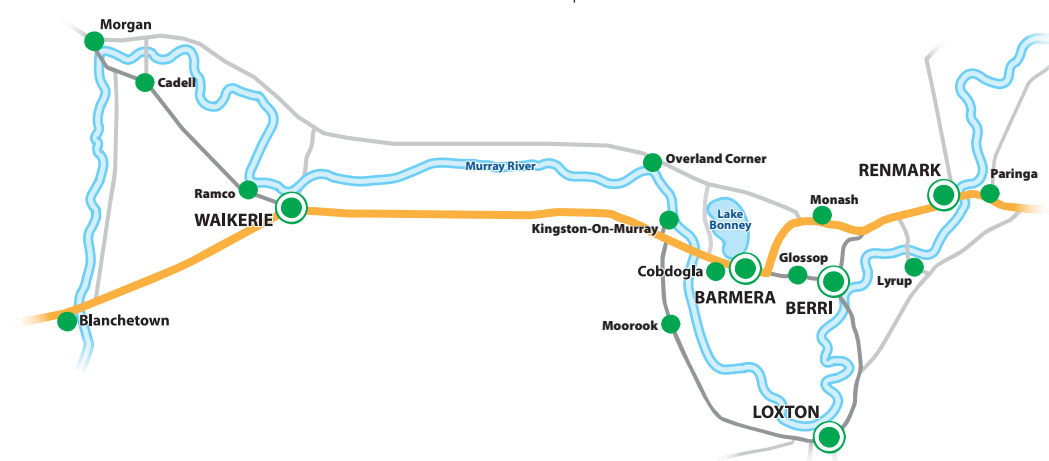
Priority actions in Creating a Collaborative Culture will include regular tourism industry networking events and joint Murray River promotions with the neighbouring Murray River, Lakes and Coorong tourism region.

Supporting Riverland Businesses will encourage businesses to list products and events on the ATDW, encourage online bookability and organise social media use, and facilitate holiday packages. Destination Riverland will facilitate workshops to assist businesses to become international ready and to target international markets through the ATE. Destination Riverland will also continue to share insights and information with the tourism industry through its Rivertimes eNewsletter and regular Riverland Visitor Surveys.

The overall measures of success created by the collective actions laid out in this plan will include growth in expenditure to \$216 million per annum by 2020, overnight visitors up to 435,000 per annum and visitor nights up to 1.9 million per annum by 2020, all based on the same growth rate or better than the previous 3 years.

The plan also identifies local gaps in tourism product and sought after experiences which will create opportunities for future tourism development and growth.

The plan and its targets will be reviewed and revised each year with a major review in 2017/18.



2. The Planning Framework

Purpose

The Riverland Tourism Plan 2020 is a five year plan that aligns with the South Australian Tourism Plan 2020¹. The South Australian Tourism Plan full potential is \$8.0 billion expenditure by 2020.

The Riverland Tourism Plan full potential is \$216 million expenditure by 2020, based on the same growth trend experienced in the region from 2010 to 2014.

The purpose of the Riverland Tourism Plan 2020 is to guide the activities of Destination Riverland and key tourism industry stakeholders.

This is a plan for the whole Riverland tourism industry, from small non-employing businesses to medium sized tourism businesses, tourism industry associations and tourism related industries including wine and food, visitor information services, Riverland communities and all levels of government.

This plan will provide confidence to invest in regional tourism and in Destination Riverland (DR) so that DR can continue to increase its support for the Riverland tourism industry and facilitate growth in the regional economy.

This plan will provide the foundations for:

- A well promoted and understood tourism region;
- A culture of collaboration amongst all stakeholders in Riverland tourism;
- A profitable flourishing tourism industry that is recognised as a core part of the Riverland economy;
- Significant job growth contributing to a resilient, vibrant and sustainable Riverland community;
- Supporting social, cultural and environmental outcomes as well as economic;
- Offering experiences with wide seasonal appeal and regional authenticity that create strong word of mouth marketing and repeat visitation; and
- Consumers understanding our competitive advantage and the depth and diversity of our experiences and therefore the desire to visit in the near future.

Scope

This plan recognises that it will take coordinated and focused efforts by all stakeholders to reach the \$216 million tourism potential. The actions therefore relate to the work of all stakeholders in Riverland tourism.

The plan recognises that most Riverland visitors are from within Australia (Figure 1) with the majority of visitors from within South Australia. Therefore the marketing focus will be on South Australians first followed by interstate visitors and international visitors.

There are many types of visitors to the Riverland including those seeking a memorable holiday experience, visitors coming to see friends and relatives and for business, meetings, conferences, education and festivals and events². All visitors have the potential to become regular visitors as they interchange between their purpose of visit.

International activity will focus on building greater capacity in the Riverland tourism industry to attract visitors from New Zealand because market analysis by the South Australian Tourism Commission³ (SATC) provides an insight that the Murray River and houseboats have a higher level of appeal with New Zealand consumers compared to consumers tested from nine other countries.

The growth in supply of Riverland attractions, upgraded accommodation, luxury accommodation, houseboats, guided canoeing, guided bird watching and major events all have the potential to attract new visitors and provide a catalyst for more tourism businesses to participate in the international market.

Destination Riverland will work collaboratively with the South Australian Tourism Commission and other key stakeholders to increase visitation from all markets.





2. The Planning Framework

Background

The Riverland Tourism Plan 2020 supersedes the Destination Riverland Strategic Plan 2012-15⁴ which guided the actions of Destination Riverland over the past 3 years and resulted in strong working relationships with its major stakeholders.

The four strategies in the Destination Riverland Strategic Plan 2012-15 were:

1. Promote the Riverland in intrastate, interstate and targeted international markets;
2. Focus on the highest priority visitor needs to reinvigorate tourism in the Riverland;
3. Develop strong working partnerships with key stakeholders in tourism;
4. Promote new tourism development and expansion in the Riverland.

The first plan was launched in 2012 following a significant drought and subsequent high river event which caused economic downturn in the region and uncertainty in traditional holiday markets. Reinstating confidence in traditional and potential visitors was essential.

The majority of KPIs in the first plan have been achieved and have grown the tourism capacity of the Destination Riverland Board, its staff and the industry, ensuring that tourism opportunities and challenges in the Riverland are better understood.

Investment by major stakeholders in Destination Riverland has enabled it to develop and implement several collaborative marketing initiatives including seasonal campaigns in summer and winter, participation in consumer shows, development of new publications to promote Riverland experiences and a new Riverland tourism map.

A new Riverland tourism website was completed in 2013 and its associated social media platforms continue to increase traffic through the website. The website aims to promote Riverland tourism experiences and businesses, increase awareness of our regional brand, increase visitation to the region and generate income for Destination Riverland to re-invest in promoting the region.

The collective experience gained by Destination Riverland in its first three years as the peak Riverland tourism body sees the Riverland tourism industry well placed to build on its achievements to date.



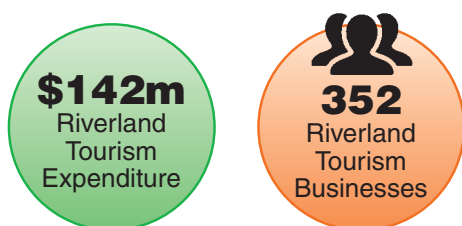
3. The Current Situation

Tourism directly employs 31,000 South Australians and makes a substantial contribution to the State economy. This level of employment is three times the number employed by the mining industry¹.

Adelaide generates 56% of total visitor expenditure in South Australia and the regions generate 44%; however given that the Australian Bureau of Statistics reports that only 23% of the State's population live outside of Adelaide¹, tourism expenditure is an important economic driver for regions.

Tourism expenditure in the Riverland as a percentage of total economic output is more than double that for Adelaide, demonstrating the importance of tourism in the region⁵.

Because of its importance there are significant investments in tourism made each year by State and local Government and by tourism businesses.



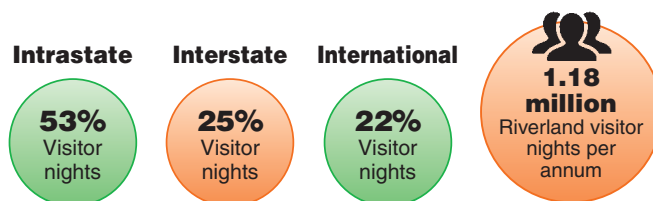
As a result, the Riverland economy receives tourism expenditure of \$142 million per annum generated by 352 businesses who create significant employment opportunities.

It is essential for the Riverland tourism industry to work cooperatively with Adelaide, as research consistently shows that visitors to South Australia have the highest satisfaction when their visit includes a mix of both Adelaide and regions.

Hence, a vibrant tourism industry in the Riverland is important to South Australia, and the Riverland must be proactive in targeting the Adelaide visitor offering regional experiences that maximise visitor satisfaction.



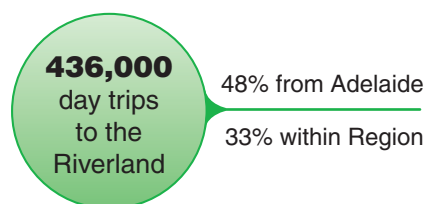
It is reported the Riverland receives 1.18 million visitor nights per annum⁶. By origin, the majority of all visitor nights are from intrastate (53%) compared to interstate (25%) and international (22%).



The holiday sector generates 57% of visitor nights and represents the most valuable group to our regional economy. Other significant generators of visitor expenditure are "visiting friends and relatives (VFR)" and visitors here for "business".



In addition, there are an estimated 436,000 day trips (Figure 1) to the Riverland each year with 48% of day trippers from Adelaide and 33% from within the region.



Local visitor surveys² confirm that domestic visitors make up most of the total visitors (85%) with the majority from Adelaide. Victoria and New South Wales are the two major interstate markets representing almost 70% of interstate visitors.



3. The Current Situation

Figure 1. Riverland Annual Visitor Summary.

Annual visitor summary June 2012 – June 2014

Riverland

	Intrastate	Interstate	Total Domestic	International	Total Visits
Visits	219,000	61,000	280,000	8,295	289,000
%	78%	22%	97%	3%	100%
Nights	626,000	298,000	924,000	257,000	1,181,000
%	68%	32%	78%	22%	100%
ALOS	2.9	4.9	3.3	31.0	4.1

DAILY TRIPS	Average annual Day trips to the Riverland	436,000
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	Holiday	VFR	Business	Other	Total
Visits	166,000	82,000	28,000	NP	289,000
%	57%	28%	10%	NP	100%
Nights	676,000	270,000	75,000	NP	1,181,000
%	57%	23%	6%	NP	100%
ALOS	4.1	3.3	2.7	NP	4.1



3. The Current Situation

Riverland tourism performance

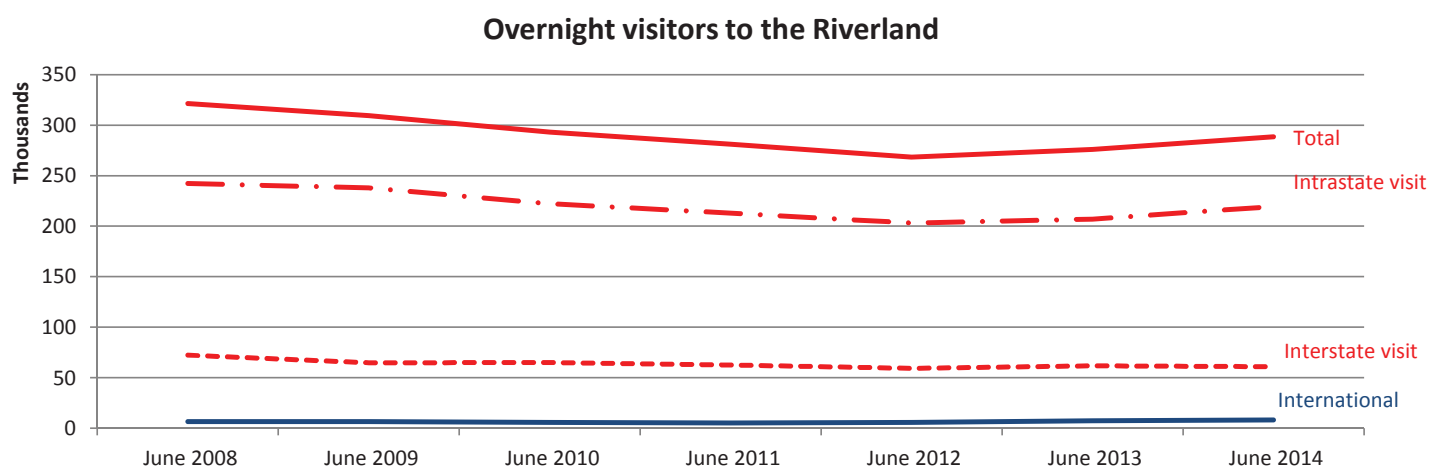
In the past 3 years tourism expenditure in the Riverland has grown from \$123 million in 2012 to \$142 million per annum in 2014 (3 year rolling average). Total overnight visitors (+13%) and total visitor nights (+17%) have also increased in this period largely due to growth in the intrastate market.

There has been strong growth in intrastate overnight visitors from June 2012 to June 2014 following a steady decline from 2008 to 2012 (Figure 2). The decline was influenced by a drought from 2000 to 2010 and a flood

in 2010/11. Interstate visitors have continued to decline steadily since 2008 and there has been a gradual increase in international visitors in from 2012 to 2014.

From 2012 to 2015 Destination Riverland has ensured that clear messages about flow in the river provide potential visitors with reassurance that there is water in the river, that the river is safe, and there are wonderful experiences to be shared during low flow and high flow periods.

Figure 2. Domestic and international visitors to the Riverland, 2008 to 2014.



Source: South Australian Tourism Commission 2015.



3. The Current Situation

A weaker Australian dollar today (2015) is encouraging Australians to explore their own country, however, in a competitive tourism industry, maintaining excellence in tourism operations is vital regardless of national and global settings.

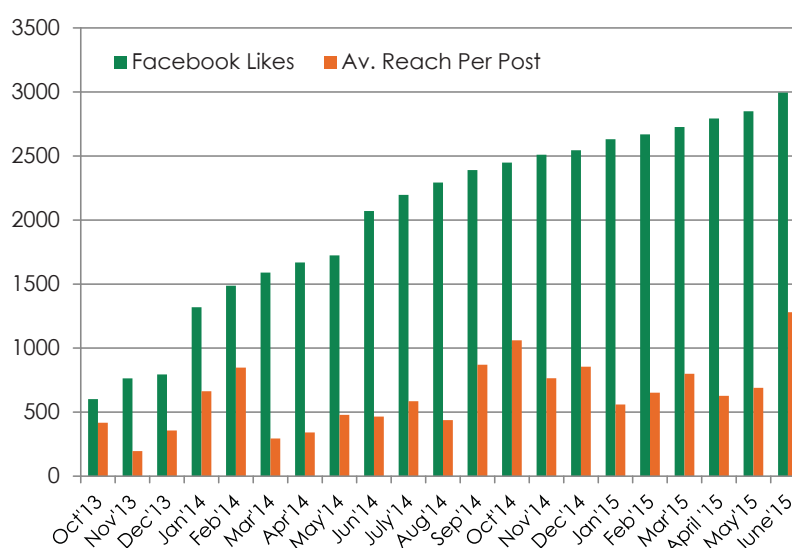
Since 2013 the South Australian Tourism Commission has promoted experiences within regional South Australia by launching the *Best Backyard* campaign which includes a Riverland TV commercial and several well placed advertisements in the Adelaide print media.

Concurrently, Destination Riverland has developed and launched a new Riverland tourism website featuring responsive design technology making it viewable on all forms of digital media including desktop and hand

held devices. Destination Riverland uses its social media platforms, Facebook and Instagram, to promote the Riverland and increase traffic through the Riverland tourism website. At end June 2015, the Destination Riverland Facebook page achieved 3,000 'Likes' (Figure 3) and the Destination Riverland Instagram account achieved 900 followers.



Figure 3. Destination Riverland Facebook page "Likes" and average reach per post.



Source: Destination Riverland, June 2015.



3. The Current Situation

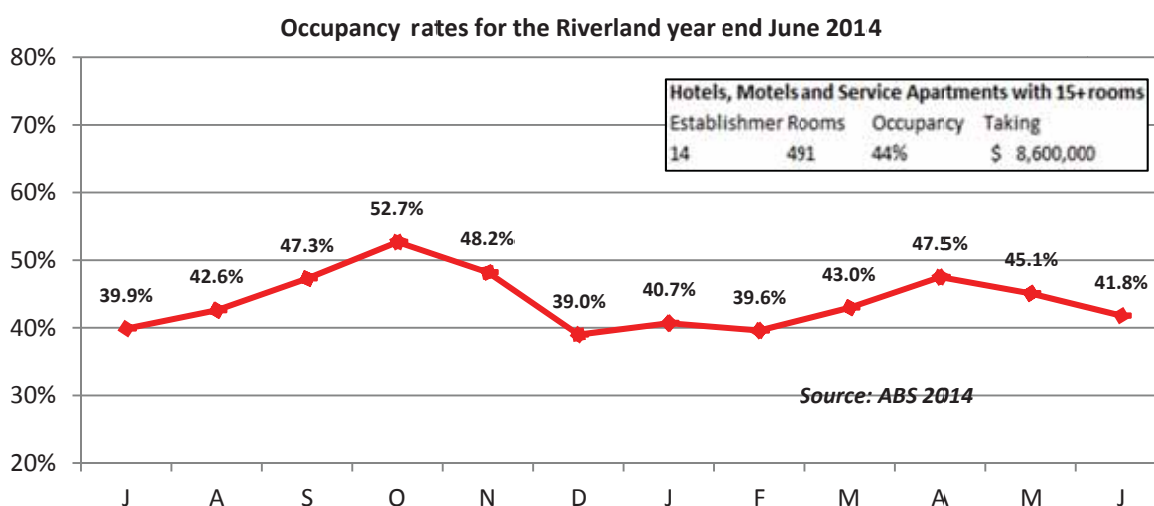
In 2013 Destination Riverland facilitated the installation of free-Riverland WiFi in partnership with all Councils in the Riverland tourism region. Free WiFi is now available in the main streets and waterfront areas of 6 major Riverland towns.

Riverland Free WiFi users are a major source of traffic through the Riverland website.

The accommodation occupancy shown below (Figure 4) peaks in spring and is lowest in winter and summer,

however, the data does not include occupancy in caravan parks and houseboats. Given that summer school holidays and watersports attract the highest seasonal occupancy in riverfront caravan parks and houseboats, it is assumed that the low occupancy shown in summer does not represent true occupancy in this season. Therefore, the lowest seasonal occupancy probably occurs in winter. Measurement of all forms of accommodation occupancy and expenditure is a priority for Destination Riverland.

Figure 4. Riverland accommodation occupancy rates.



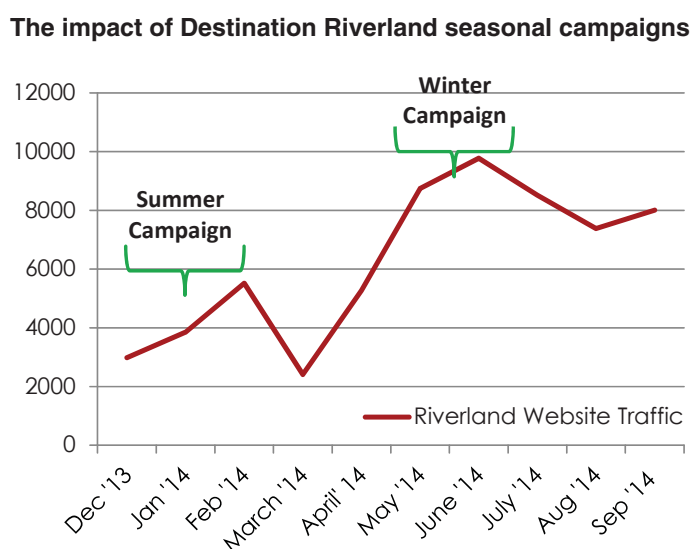
Source: South Australian Tourism Commission 2015.

3. The Current Situation

Destination Riverland has initiated a winter campaign to lift occupancy during this season. A summer campaign has also been introduced to generate visitor content on the Riverland social media platforms and website to increase awareness of the Riverland brand during this busy period.

The impact of both campaigns has been positive (Figure 5) and both campaigns are planned to continue, together with regular attendance at consumer shows including Adelaide Caravan and Camping Show and Tasting Australia.

Figure 5. Riverland website visits during summer and winter campaigns.



Source. Destination Riverland, June 2015.



3. The Current Situation

South Australian tourism regions

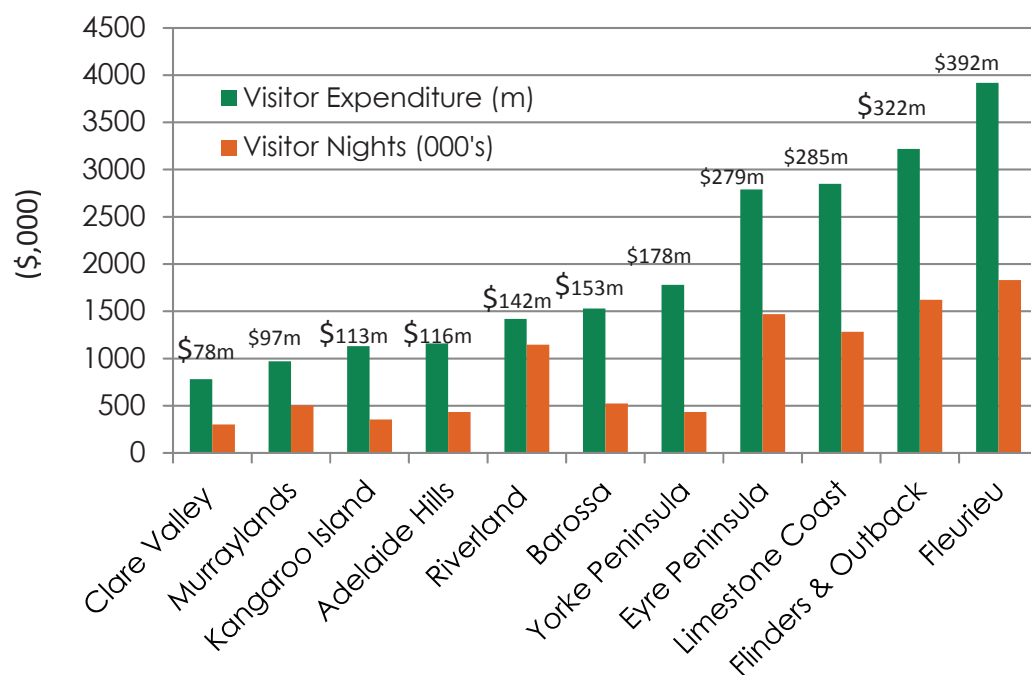
The Riverland region is the 7th highest revenue generator of the 11 tourism regions outside of Adelaide and the 5th highest in terms of visitor nights (Figure 6).

This plan aims to ensure that the Riverland continues to grow on trend with recent visitor numbers and

expenditure levels and in proportion to the South Australian Tourism Plan 2020 full potential.

The Riverland tourism region has the opportunity to build on its achievements and to rival the great food, wine, and nature destinations of the world.

Figure 6. Tourism performance in South Australia's tourism regions.



Source. South Australian Tourism Commission 2014.

4. Future Growth

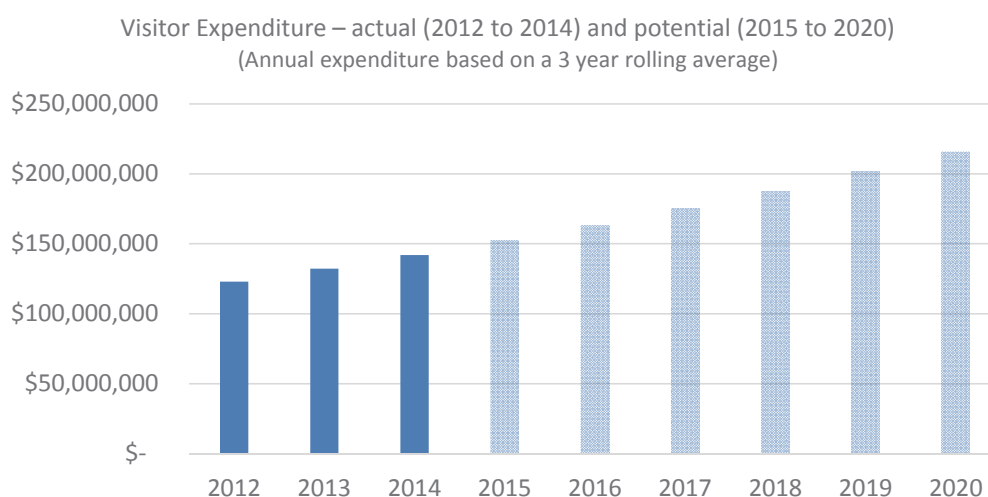
The South Australian Tourism Plan 2020 reports potential expenditure for South Australia of \$8 billion per annum by 2020, up from \$5.1 billion in December 2013. Today that expenditure has risen to \$5.2 billion⁷.

Tourism expenditure in the Riverland has grown from \$123 million in 2012 to \$142 million in 2014⁸ (3 year rolling average) and based on current trends and the

combined actions in this plan it has the potential to reach \$216 million by 2020 (Figure 7).

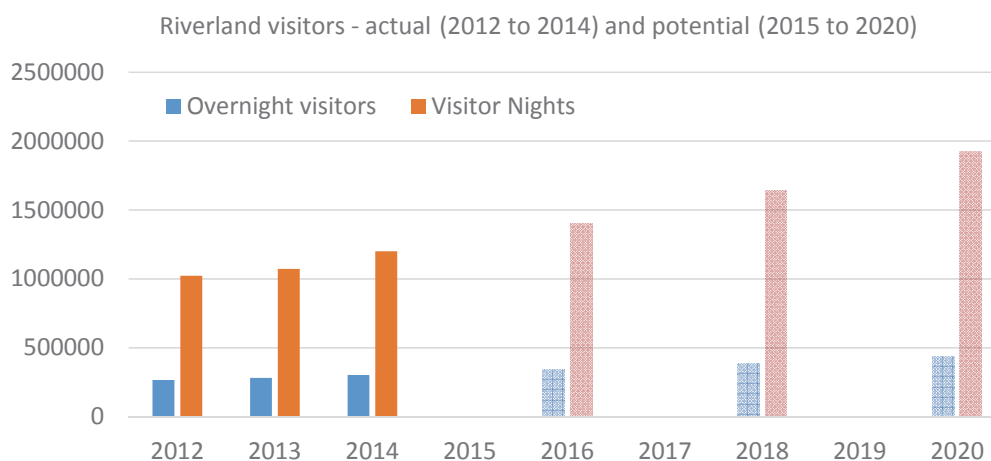
Overnight visitor numbers have the potential to grow from 302,000 to 435,000 and visitor nights have the potential to grow from 1.2 million to 1.9 million by 2020 based on the current trend (Figure 8).

Figure 7. Actual and potential visitor expenditure in the Riverland (2012 to 2020)



Source: Destination Riverland, June 2015.

Figure 8. Actual and potential growth in Riverland visitors.



Source: Destination Riverland, June 2015



4. Future Growth

Several factors will determine growth including the actions embodied in this plan and the investment by all stakeholders in its implementation. The alignment of this plan with the South Australian Tourism Plan 2020 is an important step to increase collaboration.

The South Australian Tourism Plan 2020 reports that extensive research exists on global and Australian travel trends. Tourism Australia's website links to a number of relevant summaries (www.tourism.australia.com). The 2014 Deloitte report⁹ "Building the Lucky Country" listed tourism among the 'fantastic five' next growth wave sectors to build the Australian economy, highlighting its capacity to deliver jobs.

The Riverland Destination Action Plan (DAP) 2015 to 2017¹⁰ will ensure that the South Australian Tourism Commission and Destination Riverland collaborate to enable the Riverland tourism industry to realise new development opportunities.

New plans such as the South Australian Nature Based Tourism Plan (in preparation) will increase opportunities for sustainable developments in the Riverland's river and mallee parks, providing new experiences and more reasons to visit.

Visitor services such as the five accredited Visitor Information Centres and two Visitor Information Outlets are also important for growth because exceptional visitor service can increase yield per visitor.

External factors and emerging trends affecting tourism

Some of the key external factors¹ affecting the South Australian tourism industry through to 2020 include:

- Increased usage of digital and social media;
- Continued ageing population - Baby Boomers are now hitting retirement age with over 240,000 turning 65 in 2015;
- Rise in inbound visitation, particularly from Asia;
- Movements in the Australian dollar;
- Slowing outbound passenger growth;
- Continued focus and importance of experiences.

Awareness of emerging trends and gaps in local tourism products and experiences will create new development opportunities.

Opportunities are being created by growing demand for:

- local produce including art, food and wine experiences
- nature based experiences including walking trails
- river cruises
- health and wellness activities
- waterfront accommodation and waterfront dining facilities
- tours featuring wine, food and history
- visits to food processing facilities and orchards
- cycling trails including mountain bike trails
- multicultural and Aboriginal experiences
- destination weddings, and
- adrenalin activities.



4. Future Growth

Capitalising on recent developments

In the Riverland, there are several supply side gains that demonstrate the regional tourism industry will continue to grow. Since 2011, almost 100 rooms have been upgraded to 4 or 4.5 star standard or better enabling higher yield per room and increased appeal for a Riverland holiday.

Murray River houseboat holidays remain one of the premier holiday experiences in the region and increased marketing and packaging initiatives will see significant growth in this sector.

River based camping remains a significant holiday activity especially at Easter and long weekends.

Major upgrades to town waterfronts including free WiFi in major Riverland towns of Morgan, Waikerie, Loxton, Barmera, Berri and Renmark has increased the appeal of the region as a holiday destination.

An increase in attractions and beautiful waterfront precincts are creating a new market for destination weddings.

New multi-experience attractions and new family friendly facilities will grow visitation by “young family” experience seekers.

New ventures that increase visitor access to the spectacular waterways of the Murray River will also encourage experience seekers.

Riverland motorsports events have grown significantly in the past 3 years and several new events have complemented other long-running events that continue to attract visitors. Destination Riverland will work with event organisers to encourage competitors and performers to stay for longer in the region.

Several remarkable long running events include:

- 41st Cycle Tour of the Riverland;
- 37th South Australian Country Music Festival;
- 34th Renmark Dinghy Derby;
- 27th Berri Seniors Tennis Tournament;
- 27th Paddling Marathon
- 24th Loxton Christmas Lights
- 21st Renmark Rose Festival;
- 19th Waikerie Australia Day Festival
- 13th Riverland Wine and Food Festival.



5. Overall measures of success

Destination Riverland will through its collective actions laid out in this plan, strive to enable the Riverland tourism industry to:

1. Grow tourism expenditure to a potential \$216 m by 2020 growing at 7.5% per annum or better. Expenditure will be reported as a 3 year rolling average.
2. Grow overnight visitors to the region to 435,000 by 2020, growing at 6.5% per annum or better. Overnight visitors will be reported as a 3 year rolling average.
3. Grow visitor nights in the region to 1.9 million by 2020, growing at 8.5% per annum or better. Visitor nights will be reported as a 3 year rolling average.
4. Increase investment in Destination Riverland (DR) from its key stakeholders so that non-Council investment exceeds 50% of DR annual expenditure by 2017/18.
5. Maintain and increase State Government investment in Riverland tourism and Destination Riverland.
6. Report total economic output of Riverland tourism by including expenditure on houseboats, caravan parks and self-contained accommodation.
7. Broaden and increase the number of tourism businesses and tourism related industries participating in regional promotions.
8. Increase demand for holidays such that there are visible and measurable signs of new tourism development and tourism expansion in the Riverland.
9. Provide leadership and good governance that ensures positive relationships between Destination Riverland and its key stakeholders.
10. Create greater resilience in the Riverland tourism industry and regional economy so that threats beyond its control, such as high flow events and droughts, extreme weather events and fluctuations in the Australian dollar, have less impact.



6. Priority Action Areas

The five Priority Action Areas in this plan are practical actions that trigger growth. Each action requires a consumer focused orientation — “What does the visitor want?”

A consumer led focus will impact our thinking and approaches, and will benefit all parts of the industry to ensure that investment and effort are based on fact and opportunity.

The Riverland Tourism Plan 2020 has adopted the same five Priority Action Areas as in the South Australian Tourism Plan 2020 because an extensive consultation process led to their selection.

The Priority Action Areas are:

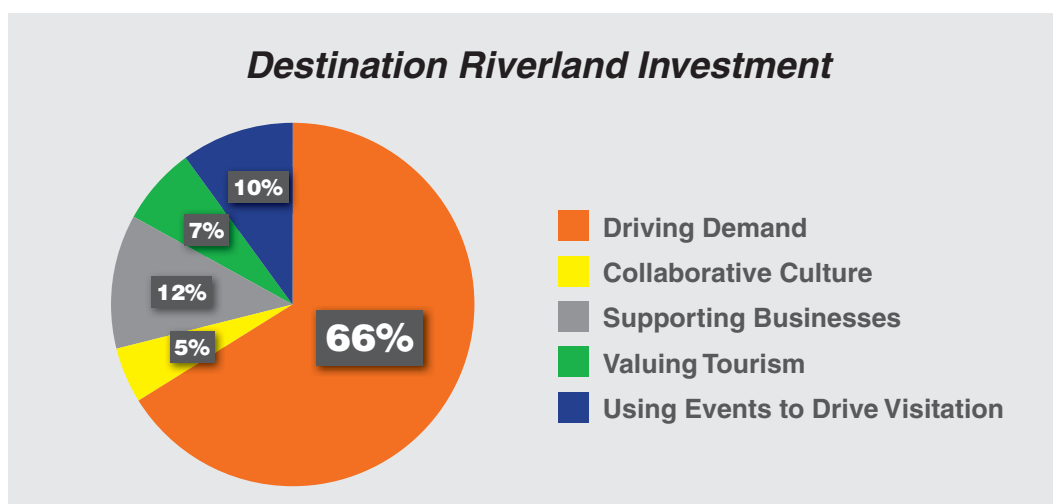
Driving Demand;
Creating a Collaborative Culture;

Supporting Riverland Businesses;
Increasing Recognition of the Value of Tourism;
Using Events to Drive Visitation.

Destination Riverland will focus its resources on each of the priority areas in proportion to its ability to achieve growth (Figure 9). Driving Demand will be the most significant priority action area with 66% of Destination Riverland annual resources invested in marketing activities. The proportion of investment in each priority area will vary slightly from year to year.

Destination Riverland and the SATC will collaborate to ensure that the priority action areas are incorporated in the 2015/16 SATC Riverland Destination Action Plan¹⁰, thereby ensuring State Government input to achieve the Riverland's tourism priorities.

Figure 9. Destination Riverland investment (%) in the five key priority actions.



Source: Destination Riverland, June 2015



6. Priority Action Areas

Driving Demand

Visitors respond most strongly to messages with an experiential focus, particularly around South Australia's competitive advantages of wine and food, nature and wildlife. Promotion of Riverland experiences featuring such messages will be key drivers of demand.

A new annual Riverland Tourism Marketing Plan will focus on experience seekers from young families, bucket listers and retired couples. The primary market will be visitors within South Australia followed by interstate (Victoria) and international (New Zealand).

There are highly sought after bird watching experiences in the Riverland that appeal to the United Kingdom market, and new opportunities will be created by the rapid growth in Chinese visitors to Australia. Opportunities to respond to both of these markets will be monitored.

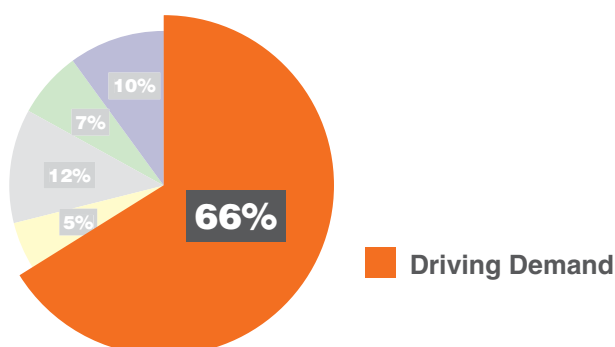
Visitors respond most strongly to messages with an experiential focus

Destination Riverland will maintain its focus on seasonal campaigns in winter and summer, together with ongoing presence at consumer shows such as Tasting Australia and Caravan and Camping Shows.

The maintenance and development of promotional tools such as the Riverland website, new Riverland map and Riverland Experiences publication will enhance these campaigns.

Destination Riverland will assist the Riverland tourism industry to develop consistent and collective marketing messages into clear marketing plans, focus on competitive advantages of being South Australian and enhance these messages with stories of Riverland experiences involving the Murray River and the surrounding mallee landscapes, local produce, culture and history, bioregional assets (natural resources, wildlife, climate) and Riverland people.

Destination Riverland Investment



Driving Demand

Destination Riverland (DR) will invest 66% of its annual resources in Driving Demand.

Actions	Measures
DA1 DR to develop annual marketing plans.	1 Completion of an annual Riverland marketing plan in May of each year.
DA2 DR to have input into the SATC Riverland DAP 2015-2017.	2 Implementation of marketing activities identified in the SATC Riverland DAP 2015-2017.
DA3 DR to enhance SATC Riverland promotions.	3 Securing matching funding from SATC for regional consumer cooperative marketing.
DA4 DR to promote Riverland experiences.	4 Attend a minimum of two consumer shows per year. 5 Maintain seasonal marketing campaigns in winter and summer.
DA5 DR to continue to optimise the Riverland tourism website	6 Growth in Riverland tourism website users to 20,000 per month by 2017/18. 7 Growth in Destination Riverland Facebook likes from 3,000 to 10,000 by 2017/18.
DA6 DR to develop new promotional tools.	8 Distribution of 30,000 Riverland maps per annum.
DA7 DR to encourage new regional tourism products.	9 Develop a business case with consumer testing for the Great River Murray Walks.



6. Priority Action Areas

Creating a Collaborative Culture

There are 352 tourism businesses in the Riverland¹¹ comprising small non-employing businesses, micro (1-4 employees), small (5-19 employees) and medium sized (20-199 employees) plus small and large industry bodies. Local Government and several State Government departments also have a stake in tourism.

There are many investors in Riverland tourism that benefit the Riverland tourism industry.

However, the challenge and need to fulfill growth potential requires a more collaborative industry.

Collaboration will allow better sharing of resources and insights, achieve greater market reach, enable agreement on shared priorities and leverage opportunities for driving growth.

RIVERLAND TOURISM BUSINESSES	
Micro Businesses	123
Small Businesses	83
Medium Businesses	21
Total Employing Businesses	227
Non-employing Businesses	125
Total Businesses	352

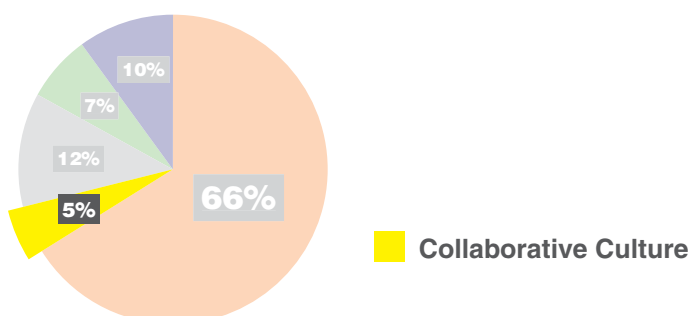
The collaboration that has begun between Destination Riverland and the SATC, the Riverland Councils and their VICs and VIOs, tourism related industries (wine, citrus, food, golf, houseboats) and tourism businesses is vital.

Destination Riverland has initiated a range of Riverland branded merchandise distributed by VICs, including polo shirts proudly worn by Riverland tourism businesses at consumer promotions.

Visitors come to South Australia and the Riverland for many reasons other than a holiday — business, events, weddings, visiting friends and relatives, and education.

Collaboration to leverage all these opportunities will continue to grow our industry.

Destination Riverland Investment



Creating a Collaborative Culture

Destination Riverland (DR) will invest 5% of its annual resources in Creating a Collaborative Culture.

Actions	Measures
CA1 DR to work closely with the SATC.	<ol style="list-style-type: none"> 1 Align the Riverland Tourism Plan 2020 with the SA Tourism Plan 2020 and the SATC Riverland DAP 2015-2017. 2 DR Chair and staff attend SATC regional tourism meetings.
CA2 DR to facilitate collaboration between Riverland tourism industry stakeholders.	<ol style="list-style-type: none"> 3 Regular Riverland tourism industry networking events.
CA3 DR to facilitate innovative partnerships between industry sectors that benefit tourism.	<ol style="list-style-type: none"> 4 A broad range of industry groups investing in DR and regional tourism.
CA4 DR to work closely with visitor services and neighbouring tourism regions.	<ol style="list-style-type: none"> 5 DR meet twice per year with VICs/VIOs. 6 DR report regional VIC monthly visitor statistics. 7 Joint Murray River promotions with the Murray River, Lakes and Coorong tourism region.
CA5 DR to encourage use of the Riverland tourism brand.	<ol style="list-style-type: none"> 8 Tourism businesses and tourism related industry bodies using the Riverland brand. 9 Riverland brand worn at consumer shows.
CA6 DR to encourage new investors in Riverland tourism.	<ol style="list-style-type: none"> 10 New tourism business ventures in the region.



6. Priority Action Areas

Supporting Riverland Businesses

Destination Riverland will play a key role in encouraging increased capability in Riverland tourism businesses to maintain and grow their markets.

Businesses can list for free their tourism product on the Australian Tourism Data Warehouse, develop holiday packages to encourage increased yield, increase distribution channels by becoming online bookable, and reach more consumers using social media.

These are all basic and essential tools used in the modern tourism industry, especially the need for all accommodation inventory to be online bookable given the strong tendency for consumers to avoid accommodation that is not online bookable.

Destination Riverland encourages all businesses to participate in these activities so that they can take advantage of emerging trends and opportunities.

There have been significant accommodation supply gains in the Riverland since 2011, approaching 100 new and upgraded rooms to 4 star or better, plus several new developments and several new events producing new and exciting foundations on which to grow the tourism industry.



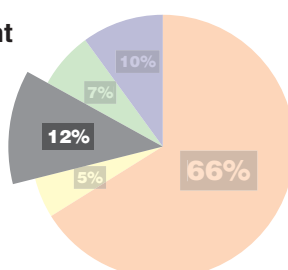
Adelaide has significantly grown its domestic and international aviation capacity and there has been significant growth in interstate and international visitors associated with sporting events at the new Adelaide Oval precinct. Several new hotel developments in the Adelaide CBD are in development. Hence there is an opportunity to increase the number of Adelaide visitors to venture out to the Riverland.

The SATC has recently announced a significant budget increase (\$35 million over the next 2 years) to increase international visitation, promote Adelaide and the South Australian tourism regions and secure events. The Riverland Destination Action Plan 2015-2017 (DAP) provides a framework for Destination Riverland to capitalise on these existing developments.

Short (2-3 day) holiday packages that offer spectacular value and experiences can increase yield and length of stay, and exceptional customer service at all visitor “touch points” will ensure strong satisfaction, repeat visitation and word of mouth marketing.

Smart use of the online environment will be essential to reach markets and convert interest in visitor experiences through various distribution systems including professional websites, social media and online booking systems — thus ensuring the region is competitive in a global market place.

Destination Riverland Investment



■ Supporting Business



Supporting Riverland Businesses

Destination Riverland (DR) will invest 12% of its annual resources in Supporting Riverland Businesses.

Actions	Measures
SA1 DR to encourage building Riverland tourism business capacity	<ol style="list-style-type: none"> 1 Facilitate accommodation businesses becoming online bookable. 2 Encourage use of ATDW, holiday packaging and social media. 3 Distribution of accommodation packages on the Destination Riverland website.
SA2 DR to support Riverland businesses to reach their full potential in domestic and international markets.	<ol style="list-style-type: none"> 4 Facilitate SATIC training on regional tourism needs. 5 Facilitate SATC workshops to assist businesses to become international ready including understanding the potential China opportunity. 6 Facilitate Riverland tourism business presence at the Australian Tourism Exchange.
SA3 DR to work with the SATC to help disperse Adelaide visitors to the Riverland.	<ol style="list-style-type: none"> 7 Develop an Adelaide visitor dispersal strategy to the Riverland.
SA4 DR to maintain regular communication with the Riverland tourism industry and key stakeholders.	<ol style="list-style-type: none"> 8 Maintain Rivertimes eNewsletter fortnightly.
SA5 DR to assist tourism businesses, industry and Government make informed decisions by mutually sharing insights on what consumers seek.	<ol style="list-style-type: none"> 9 Organise quarterly Riverland Visitor Survey reports to the Riverland tourism industry and its key stakeholders. 10 Share SATC tourism industry performance reports with the Riverland tourism industry.
SA6 DR to promote a customer service culture.	<ol style="list-style-type: none"> 11 Partner training organisations in the development of a recognised Riverland customer service training program.
SA7 DR to help strengthen the overall return on tourism assets — both private and public.	<ol style="list-style-type: none"> 12 Maintain marketing campaigns in off-peak season and measure occupancy response.



6. Priority Action Areas

Increasing Recognition of the Value of Tourism

The 352 tourism businesses in the Riverland tourism industry create significant employment opportunities in the region. Tourism is a labour intensive industry and therefore growth in its economic contribution produces more jobs per dollar than most other industries.

Tourism's significance is even greater after adding the indirect impact through economic multipliers, its building of a strong regional brand and its subtle long term benefits where great visitor experiences can lead to retirement in the region.

Tourism also provides local food and wine producers with an opportunity to showcase their products to visitors. They can take advantage of a growing trend to trust the source of food and the preference for a tourism experience that includes local produce.



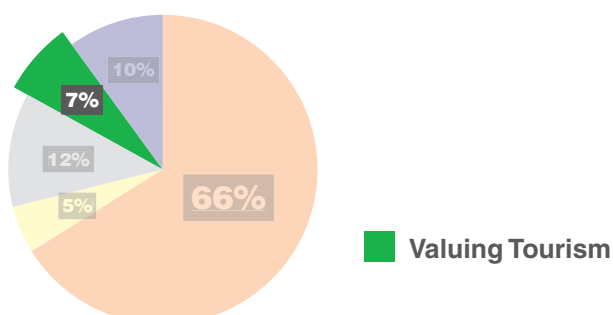
The Riverland's "fruit bowl of South Australia" status plus emerging locally farmed foods such as Murray Cod, bush foods, duck and saltbush lamb, provide great opportunity for primary producers to link with tourism businesses to promote and sell their product.

Seasonal tourism campaigns can also provide the food and wine industry with an opportunity to reach millions of potential consumers.

A strong regional tourism industry will also encourage new investment in the region.

Appreciation of the role tourism plays at the local economy level also helps individuals and communities take a more ambassadorial role in welcoming and showcasing their communities and places to visitors.

Destination Riverland Investment





Increasing Recognition of the Value of Tourism

Destination Riverland (DR) will invest 7% of its annual resources to Increase Recognition of the Value of Tourism.

Actions	Measures
VA1 DR to promote the value of tourism.	1 Produce an annual Riverland tourism outlook publication.
VA2 DR to raise the profile of regional tourism products and experiences.	2 Showcase regional tourism assets through media famils.
VA3 DR to support new ways to measure the value of Riverland tourism.	3 Include houseboats, caravan parks and B&Bs in measures of Riverland accommodation occupancy and expenditure.
	4 Endeavour with key event organisers to measure the value of events.
VA4 DR to create Riverland tourism advocates to endorse the diversity of Riverland products and experiences.	5 Establish a Riverland Ambassadors program to increase endorsement of the region's tourism products and experiences.



6. Priority Action Areas

Using Events to Drive Visitation

The Riverland boasts several significant long-running events and new major events that help to promote the Riverland as a diverse and attractive place to visit.

There are more than 100 events in the Riverland crossing watersports, sporting tournaments and carnivals, motor sports, food and wine, flower shows and festivals, cycling tour, pedal prix, commando course, music and dance festivals, sheep dog trials, festive season events and regular markets and public holiday celebrations.

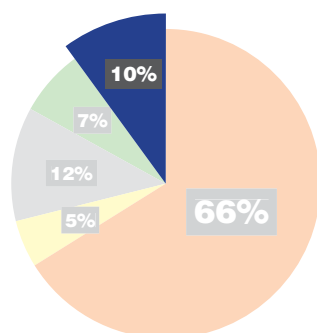
Many visitors plan their holidays in the Riverland around their favorite Riverland events.



Events and festivals have the capacity to create reasons to visit across the whole year and therefore increase visitors and expenditure in the quieter seasons. They play a role in all of the previously outlined Priority Action Areas and should be treated in a coordinated way.

Destination Riverland will work with the SATC to develop new regional events consistent with the SATC Riverland DAP 2015-2017 and work with Riverland event organisers to maintain sustainable events that encourage visitors to stay longer and to return.

Destination Riverland Investment



■ Using Events to Drive Visitation



Using Events to Drive Visitation

Destination Riverland (DR) will invest 10% of its annual resources in Using Events to Drive Visitation.

Actions	Measures
EA1 DR to support existing and new events held in the Riverland.	<ol style="list-style-type: none"> 1 DR to feature Riverland events on the DR website, in the annual Riverland Visitor Guide and other SATC promotions. 2 Develop and support a centralised on-line event management system for the Riverland
EA2 DR to encourage event participants to stay longer.	<ol style="list-style-type: none"> 3 Partner with major event organisers to encourage participants to increase their length of stay.
EA3 DR to support Riverland event organisers achieve sustainable events.	<ol style="list-style-type: none"> 4 Endeavour with major event organisers to develop a template to measure event performance.
EA4 DR to facilitate and encourage new Riverland events.	<ol style="list-style-type: none"> 5 Develop a Riverland Ambassadors sporting carnival. 6 Report the number of new events each year
EA5 DR to encourage visitors on route to non-Riverland events to travel via the Riverland.	<ol style="list-style-type: none"> 7 Collaborate with Regional tourism managers and event managers in other regions.

7. Role of Key Stakeholders

This plan recognises that growth in tourism requires integrated and collaborative work between multiple stakeholders. The roles of key private and public stakeholders are listed here.

The plan recognises that Destination Riverland has a leadership role in implementation of this plan, as does the SATC, especially in fostering and maintaining the focus on priority action areas that will drive growth in Riverland tourism and add value to tourism related industries.

The plan also recognises that tourism businesses must take responsibility for their product quality and authenticity and encourages marketing that includes listing on the ATDW, packaging with other products, online bookability and embracing a modern website and use of social media.

The following diagram (Figure 10) sets out the roles of key stakeholders in Riverland tourism.

Government

Tourism Australia is the peak national tourism organisation responsible for promoting Australia's tourism experiences in international markets, and facilitating trade between international buyers and Australian tourism product sellers.

The South Australian Tourism Commission (SATC) is South Australia's peak tourism organisation responsible for implementing the South Australian Tourism Plan 2020. The SATC works closely with regional tourism bodies to build regional brands, to increase domestic and international visitors to Adelaide and the regions, and provide information and strategic support to regional tourism boards and businesses.

The SATC works collaboratively with Destination Riverland to enable the South Australian Tourism Plan 2020 to align with the Riverland Tourism Plan 2020 through its Riverland Destination Action Plan 2015-17 which identifies priority actions to be undertaken by both organisations.

Regional Development Australia — Murraylands and Riverland (RDA) is responsible for facilitating economic development in the Riverland including tourism. The RDA Murraylands and Riverland Regional Roadmap 2013-2016 recognises tourism as one of five major growth opportunities for the future.

The Roadmap sets a goal (6) to achieve "Strong and prosperous regional industries" with the action (6.1) to provide active support of Tourism organisations and their objectives. There is strong overlap with the priority areas in this plan including upskilling in on-line marketing and promoting our world class experiences.

SA Department of Environment, Water and Natural Resources (SADEWNR) oversees the management of Murray River National Park and several conservation reserves in the region which are vital natural assets that create memorable experiences with nature. SADEWNR also has a responsibility to promote South Australia's parks and to ensure that the impact of visitation does not detract from the visitor experience.

SADEWNR and SATC have recently commenced development of a Nature Based Tourism Strategy for South Australia that will encourage sustainable development and new visitor experiences in high value natural areas.



Figure 10. Key stakeholder roles in Riverland tourism





7. Role of Key Stakeholders

Local Government

Destination Riverland

Destination Riverland is an incorporated association and is the peak regional tourism body in the Riverland. It was formed in 2011 following the stewardship of local government to create a new peak regional tourism body so that the region could transition from State Government led to an independent of Government leadership model. Local government now provides the core funding for Destination Riverland.

The four Councils in the Riverland tourism region each provide visitor services via an accredited Visitor Information Centre or Visitor Information Outlets. Councils also play key roles in funding events and festivals, facilitating investment attraction, maintaining tourism related infrastructure, developing new tourism products and fostering pride in the community.

Each Council has a Strategic Plan that makes reference to its role in tourism.

Each Council has agreed to invest in Destination Riverland over the next 3 years.

Renmark Paringa Council

The Renmark Paringa Community Plan 2012 – 2016 acknowledges Destination Riverland in its Community Sustainability Business Model. The plan includes Strategy 2.1 — A Robust Economy - Develop and implement initiatives to encourage a vibrant and growing tourism industry.

Renmark Paringa Council's *See Renmark 2024* vision is a partnership with key stakeholders including Destination Riverland and encourages town centre modernisation and waterfront developments plus the

Great Murray River Walks. This vision will ensure that Renmark is a key contributor to growth in Riverland tourism.

The Renmark Paringa Council has provided core funding to Destination Riverland since 2011/12 and has committed annual funding to 2017/18.

Loxton Waikerie District Council

The Loxton Waikerie District Council Strategic Plan 2010-2015 includes the Community Goal — Sustainable Economic Development.

A Key Strategy to achieve this goal includes 1.2: Encourage a vibrant tourism industry; based on the following strategies:

- 1.2.1 Foster tourism opportunities at a local, district and regional level by building upon existing tourism and business icons.
- 1.2.2 Lift the economic and financial profile of the region through targeted promotion and marketing, event coordination and publicising of business success.
- 1.2.3 Promote and attract events and festivals that add value to the local economy.
- 1.2.4 Consider establishing international relationships based on trade and tourism.
- 1.2.5 Use social networking tools to market and promote the region.

The Loxton Waikerie District Council has provided core funding to Destination Riverland since 2011/12 and has committed annual funding to 2017/18.



Berri Barmera Council

The Berri Barmera Council's Strategic and Corporate Plans include tourism in its vision of a diversified economy — *"In 2025 the economy will be horticulture based but more diverse and vibrant, with a range of traditional and new businesses."*

In 2015 Berri Barmera Council developed a Tourism Strategy that identifies collaboration with Destination Riverland and other key stakeholders to:

- Increase the district's position within the tourism industry by increasing visitation revenue;
- Encourage a vibrant and varied business sector to maximise the opportunity for visitors to spend whilst in our district
- Collaborate with stakeholders to capitalise on shared resources and minimise duplication;
- Increase community pride in residents through tourism;
- Provide high quality facilities, services and attractions to ensure visitor expectations are met or exceeded; and
- Support the recognition and protection of our environment as a key tourism asset.

The Berri Barmera Council has provided core funding to Destination Riverland since 2011/12 and has committed annual funding to 2017/18.

Mid-Murray Council

The Mid Murray Council Strategic Plan 2006-2011 (Revised 2008) recognises tourism as a key to economic diversification in the region.

The Mid-Murray Council Tourism Policy 2015 states

1. To provide exceptional Information services to visitors to our region
2. To facilitate tourism growth and development
3. To be a leader in the implementation of the regional strategic tourism plans.
4. To ensure a positive policy planning environment conducive to tourism development
5. To provide and maintain quality visitor services and facilities
6. To encourage activities that foster community spirit, which activate the region and introduce colour, movement and life to the area.

The Mid-Murray Council has provided core funding to Destination Riverland since 2011/12 and has committed future annual funding to 2017/18.

Riverland Local Government Forum

The Riverland Local Government Forum (RLGF) is made up of the Councils of Berri Barmera, Loxton Waikerie (District Council) and Renmark Paringa.

RLGF meetings provide an opportunity to discuss tourism issues and opportunities that are common to all Councils in the Riverland.

Destination Riverland is a participant in RLGF meetings.



7. Role of Key Stakeholders

Tourism Industry groups

South Australian Tourism Industry Council

The South Australian Tourism Industry Council (SATIC) is South Australia's peak tourism body, a non-government, independent organisation built on member input to represent and further the interest of the South Australia tourism industry.

SATIC facilitates tourism industry training and hosts the annual South Australian Tourism Industry Conference and South Australia Tourism Awards. SATIC also manages the accreditation process for several tourism industry benchmarks such as Eco-Certification.

Destination Riverland is a member of SATIC and encourages tourism industry participation in the South Australia Tourism Awards and the South Australia Tourism Industry Conference.

Houseboat Hirers Association/Boating Industry Association

The Houseboat Hirers Association (HHA) promotes house boating experiences on the Murray River in South Australia and operates a booking service for its members.

HHA works closely with Destination Riverland on several cooperative marketing campaigns including the Adelaide Caravan and Camping Show, Riverland Winter Campaign and the Riverland map.

South Australian Regional Tourism Organisations

There are 11 tourism regions outside Adelaide. Each regional tourism organisation (RTO) has the challenge of growing tourism in its region through industry leadership, support and advocacy.

The Chairs of each RTO meet regularly with the SATC to address common regional issues and provide a collective voice to the SATC and State Government.

The Regional Managers from each RTO also meet regularly with the SATC to ensure there is positive and productive collaboration with the SATC.

Murraylands Tourism Partnership

The Murraylands Tourism Partnership (MTP) is the peak regional tourism body responsible for tourism strategy and promotions in the Murray River, Lakes and Coorong tourism region downstream of the Riverland.

The MTP and Destination Riverland have worked collaboratively at various consumer shows and have the opportunity to work closely to promote their Murray River regions linked by the SATC Might Murray Way touring route and their respective visitor guides.

Tourism Related Industry groups

Food Riverland Inc.

Food Riverland was formed in 2001 to promote Riverland produce. It manages the Riverland Farmers Market in Berri. A large number of tourists visit the market and in 2009 the Riverland Farmers Market won the Best Tourism Attraction category at the Riverland Tourism Awards.

Food Riverland has been heavily involved in promoting the region by taking Riverland produce to the annual Tasting Australia event in Adelaide.

Riverland Wine

Riverland Wine is the peak body for the Riverland Wine Industry providing leadership for the region's wine growers, wine makers and wine marketers.

The Riverland Wine Strategic Plan 2014-2019 includes a key objective to encourage and initiate partnerships that raise the profile of Riverland wine, food and tourism products, programs, promotions, activities and services.

Riverland Wine is a strong supporter of Destination Riverland "Winter Campaign" and Tasting Australia.

Citrus Australia — SA Region

Citrus Australia SA Region has supported several initiatives to promote the Riverland as a tourist destination and provides Destination Riverland with the opportunity to promote the region on the Citrus Australia – SA Region stand at the Adelaide Show.

Tourism businesses

Riverland tourism businesses have participated for over 30 years in regional promotions organised by the Riverland Tourism Association and recently by Destination Riverland. Many businesses participate in a quarterly Riverland Visitor Survey to ensure that the tourism industry understands its markets and how effectively the industry is reaching its markets.

Destination Riverland works with numerous tourism businesses in the Riverland to facilitate cooperative marketing opportunities and training.

Many intending and expanding businesses approach Destination Riverland for assistance with letters of support and strategic advice.

Destination Riverland maintains regular communication with the Riverland tourism industry through its fortnightly Rivertimes e-Newsletter.

Riverland Event Organisers

Riverland event organisers are community minded and passionate about their interests. They organise events that motivate people to visit the region and to purchase accommodation, food and wine, and other services such as fuel.

With more than 100 events throughout the year, events make a significant contribution to the Riverland economy.

Destination Riverland is keen to work with event organisers to help maintain sustainable events and encourage participants to stay longer and return to the region.

8. Acknowledgements

The Riverland Tourism Plan 2020 has been prepared by the staff of Destination Riverland with input from many stakeholders in Riverland tourism.

The managers of the 5 visitor information centres in the Riverland provided feedback on the early drafts of the plan.

The Councils in the Riverland tourism region also provided feedback and attended meetings with Destination Riverland to discuss key actions and measures.

Riverland tourism businesses and key tourism related industries have also provided feedback on the draft.

The South Australian Tourism Commission prepared input and analysis on the document and provided key data to update trends in occupancy, expenditure and visitor numbers.

The sub-committees of Destination Riverland and individual board members have made significant contributions to the plan.

9. Glossary

ALOS	Average length of stay (usually expressed as nights)
ATE	Australian Tourism Exchange
ATDW	Australian Tourism Data Warehouse
DAP	Destination Action Plan (a plan prepared by SATC in consultation with DR).
DR	Destination Riverland Incorporated
IVS	International Visitor Survey
KPI	Key Performance Indicator
MTP	Murraylands Tourism Partnership

NVS	National Visitor Survey
RDA	Regional Development Australia
RTO	Regional Tourism Organisation
SATC	South Australian Tourism Commission
SATIC	South Australian Tourism Industry Council
VFR	Visiting Friends and Relatives
VIC	Visitor Information Centre
VIO	Visitor Information Outlet

10. References

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11. Evaluation and Reporting

Regular stakeholder reporting

Destination Riverland will review its actions set out in this plan every six months including funding sources and provide a progress report to its major funding partners.

Annual reviews

Destination Riverland holds an annual general meeting and appoints an auditor to review its finance management.

Destination Riverland will review its targets and report against key tourism measures including expenditure, overnight visitors and visitor nights.

3 year review

The 3 year investment by all Councils in the Riverland tourism region will result in a major review in 2017/18 of all actions and measures laid out in this plan and a report prepared for Councils.

Additional plans to assist with evaluation and reporting

Destination Riverland will prepare an annual Tourism Marketing Plan in May of each year (Action DA1) and prepare an annual review of marketing activity and performance to assist in the overall annual and 3 year review of this plan.

The South Australian Tourism Commission, in implementing the South Australian Tourism Plan 2020, conducts regular reviews of regional tourism performance based on National Visitor Survey data and International Visitor Survey data collected by the Australian Bureau of Statistics.

Tourism Research Australia also prepare reports using these data sources (NVS and IVS).

Local Visitor Surveys

Destination Riverland coordinates and prepares a quarterly Riverland Visitor Survey report providing greater insight into Riverland visitor profiles and tourism performance.

Riverland VICs collect visitor origin information that assists Destination Riverland in reporting regional tourism performance.





