Tourism Situation Analysis

as at July 2019
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Disclaimer

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

In the course of our preparation of the document, recommendations have been made on the basis of assumptions, methodology and information provided by many sources through the consultation process (See Acknowledgements).

Whilst every effort was made to report on the most accurate data and information available, Tourism eSchool accept no responsibility or liability for any changes in operation/destination circumstance, errors, omissions, or resultant consequences including any loss or damage arising from reliance on the information contained in this report.
Statement of Acknowledgement

Council acknowledge the land of the Gawler Township is the traditional lands for the Kaurna people and that we respect their spiritual relationship with their country.

We also acknowledge the Kaurna people as the custodians of the greater Adelaide region and that their cultural and heritage beliefs are still as important to the living Kaurna people today.
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Glossary

ABS – Australian Bureau of Statistics
ATDW – Australian Tourism Data Warehouse
BVIC – Barossa Visitor Information Centre
DPTEI – Department of Planning, Transport and Infrastructure
BT – Barossa Trail (formerly Jack Bobridge Track)
KVIC – Kapunda Visitor Information Centre
LGA – Local Government Association
LRC – Light Regional Council
GBH – Gawler Bike Hub
GHT – Gawler History Team
GRP – Gawler Rivers Path (Tapa Pariara)
NHTSAG – National History Trust of SA - Gawler Branch
RDA BGLAP – Regional Development Australia Barossa, Gawler, Light + Adelaide Plains
RTO – Regional Tourism Organisation
SOB – Stuart O’Grady Bikeway
SATC – South Australian Tourism Commission
TA – Tourism Australia
TBC – The Barossa Council
TBI – Tourism Barossa Incorporated
TiCSA – Tourism Industry Councils SAC
TOG – Town of Gawler
TOG VIC – Town of Gawler Visitor Information Centre
TDU – Tour Down Under
TRA – Tourism Research Australia
VFR – Visiting Friends and Relatives
VIC – Visitor Information Centre (Accredited)
About this Document

Town of Gawler (TOG) has a Tourism vision:

To be recognised as South Australia’s oldest and most significant country town that offers rich and engaging heritage, cultural and active experiences through its people, places, landscapes and events.

To achieve this Tourism vision, the TOG uncovered the town’s potential for the visitor economy through a thorough consultation with all industry stakeholders to develop a comprehensive Tourism Situation Analysis, July 2019. From this Analysis, a Tourism Plan 2019-2024 has been developed which outlines the actions council will implement to achieve the vision.

Where to start...

Tourism Situation Analysis, July 2019 – YOU ARE HERE!

This document offers an in-depth analysis of the Visitor Economy for the TOG as at July 2019. This is a must-read for those who are interested in gaining a deep understanding of the state of play for the tourism sector for the Town.

Tourism Plan 2019-2024

This document sets the priorities to boost the visitor economy in TOG over the next 5 years. It includes the Actions to be implemented and KPIs to be measured to achieve the opportunities that were identified in the Tourism Situation Analysis, July 2019.

Tourism Plan Snapshot 2019-2024

This document offers a bird’s eye view of the Tourism Plan 2019-2024.
Executive Summary

Town of Gawler (TOG, the Town) recognise the increased importance of the visitor economy within their planning frameworks, and as such contracted Tourism eSchool, a tourism consultancy based in South Australia, to develop a Tourism Plan for the Town with the aim of articulating a vision for the growth of the visitor economy.

TOG already play a significant and diverse role in developing its visitor economy. In addition to owning and managing the Accredited Visitor Information Centre (TOG VIC) in the main street of Gawler, they have recently invested significantly in the restoration and reinvigoration of the Gawler Civic Centre, which has been earmarked as a cultural hub for locals and visitors alike.

The Town also has a number of significant and unique drawcards, particularly Heritage, History, Arts and Culture experiences, which highlight the historical significance of the Town and South Australia. This is complemented by some key Outdoor and Adventure experiences, whereby TOG also already invests in critical cycle tourism infrastructure, including a number of national standard shared paths, river and reserve trails, and a well-positioned and managed bike hub. TOG also manage important community infrastructure and core amenities that are enjoyed in the town by visitors, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services.

Currently there is no single data source which captures a complete picture of the true visitation to the Town, which is a challenge when it comes to measuring the return on investment in the sector. However, micro-metrics are available through the TOG VIC and some digital marketing platforms to gauge visitor engagement of the Town as a tourism destination. Wider metrics for the Barossa tourism region are also available, and are helpful in providing insights as it relates to visitor data and behaviour.

Whilst the original scope of this project was to develop a Cycle Tourism Strategy, it was identified throughout the consultation process that in order to grow the ‘Cycle Tourism’ niche, the Town needed to focus on growing the whole visitor economy, of which cycle tourism would then be able to be successfully activated.

The first step was to develop this Tourism Situation Analysis, which involved consultation with all levels of industry, to ensure all available information was considered to draw realistic conclusions for TOG. Consultation included one on one meetings with various stakeholders (all levels of industry and government), community workshop, and an online survey which targeted the community and industry (see Section 13 Acknowledgements).

Through this consultation, Tourism eSchool identified all the key internal and external stakeholders’ roles and responsibilities, analysed the current visitor data insights, tourism market segments, product, access, infrastructure, marketing, branding, resourcing and visitor servicing within the Town, and from this, have formulated the Town’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 were considered in the development of the Tourism Plan 2019-2024 (separate document).
1. SETTING THE SCENE

1.1 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. The visitor economy encompasses the contribution tourism makes to employment, investment, infrastructure development, exports, provision of temporary labour and social vibrancy.

When it comes to calculating the return on marketing investment of investment in the Visitor Economy, it can be challenging to calculate a direct return on investment as there are often multiple stakeholders investing in a project and often results that are difficult to quantify. However, as a guide for organisations investing in a Visitor Economy, the 2015 Productivity Commission Report\(^1\) found that for every $1 invested in a Visitor Economy, the return on investment was $15, while Tourism Accommodation Australia\(^2\) found the return as high as $22 for every $1 invested.

Results from the Australian Regional Tourism Network (ARTN) Local Government spend on Tourism Report 2017\(^3\), noted that South Australian Councils, on average, spent $17 on visitor economy related investment per resident. The report also highlighted the following sentiment from respondents:

- 90% respondents agreed that tourism offers economic development opportunities;
- 78% respondents agreed that tourism is one of the most important local industries;
- 72% respondents agreed that economic benefits far outweigh the costs of council investments in tourism; and
- 52% respondents agreed that tourism should be a higher priority in council.

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1.2 Global Tourism Trends

There are several key global tourism trends that destinations need to address to grow a sustainable visitor economy. These trends should be used as a lens to help prioritise resourcing of investment in Tourism.

The following trends are covered in detail in Trekk Soft’s “Travel Trends Report 2019”\(^4\), Trekk Soft’s “9 Travel Trends to Drive Tourism in 2018”\(^5\) and the World Travel and Tourism Council’s “Travel and Tourism: Global Economic Impact and Issues 2017”\(^6\).

**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 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 for 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 natives.

- **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.

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Mobile bookings will be the new default

The majority of travellers have smartphones (there is a 102% mobile penetration rate in the Asia Pacific Region7), 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.

Invest in new Technologies with care

While new technologies, such as augmented and virtual reality, connected digital devices and apps, become mainstream, and can offer exciting new ways to engage visitors, tourism brands need to ensure they invest in them with care. They first need to be clear on the type of visitor experience they want to deliver, before then exploring the best type of technology to support that experience. They should not just invest in the technology because is cool and new.

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 advertising8. 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.

Generational differences are blurring

Baby boomers are looking for more adventure, Gen X’s and Millennial are highly travelled (as are their kids) while 30 – 50 year olds are looking for relaxation. People travel for different aspirations and interests, regardless of their age and gender. Therefore, tourism brands must focus on attracting customers with similar aspiration and interests, and not just define customers by where they live or their ages. They can also focus on relevant experience development and marketing messages that appeal to the different lifestyle and interests of travellers.

Chinese travellers mature

As Chinese outbound visitors continue to grow globally, destinations will see more repeat visitors and growth in independent travellers who explore a country more widely from the traditional gateway destinations in their countries. Tourism brands who want to grow their Chinese visitor numbers need to ensure they are delivery unique and authentic experiences, that provide these visitors with a unique story to tell about their travels and meet specific cultural needs of these travellers. Work also needs to be done to ensure businesses in regions understand and leverage the mobile payment options preferred by Chinese guests to better capture their expenditure during their visits.

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

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.

1.3 National Tourism Priorities

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.9

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.10

TA are on track to achieve their goal of more than A$115 billion in overnight spend by 2020. At 30 March 2018, overnight visitor expenditure reached $107.4 billion, up 6 per cent on the previous year. Recent forecasts indicate that overnight visitor spend will reach $131 billion by 2020.11

According to Tourism Research Australia, the Australian tourism industry is forecast to grow to $151 billion in overnight spend and 15 million international visitors by 2026-27.12

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12 Tourism Research Australia, Tourism Forecasts 2017, p1
1.4 State Tourism Priorities

In South Australia, tourism continues as a key driver of the state’s economy. The South Australian Tourism Commission (SATC) is currently working toward their 2020 strategy, which is focussed on achieving the South Australian tourism industry’s full potential of $8.0b of visitor expenditure and an additional 10,000 jobs by 2020\(^\text{13}\).

As at the year ending December 2018\(^\text{14}\) the state has seen a rise in expenditure of 3% to a record $6.8 billion. In 2016/2017, the Tourism industry has supported 36,000 jobs directly, which has increased by 15% since the targets were set in 2012/13, and continues toward the progress of the goal towards an additional 10,000 jobs by 2020\(^\text{15}\).

With regard to visitation, the state has experienced the following growth (December 2018 quarter)\(^\text{16}\):

- Visits to South Australia grew 4% to a record high $7.1 million
- Nights in South Australia reached 34 million, flat for the year
- International expenditure has risen 4% to $1.15 billion
- Interstate expenditure rose 12% to a record high $2.2 billion
- Intrastate expenditure in South Australia also rose, up 2% to a record high $1.9 billion
- Interstate visitation grew strongly, up 11% reaching a record high of 2.6 million; and
- Domestic expenditure growth of 4% was driven by expenditure in regional South Australia, up 6% to 2.7 billion.

Regional tourism plays a key role in the South Australian visitor economy, with 40% of the State’s total visitor expenditure being spent in the 11 tourism regions. In May 2018, the South Australian Regional Visitor Strategy was launched highlighting key strengths, future potential priority areas for each of the regions, which are all focused on achieving the state’s 2020 target.\(^\text{17}\) The implementation will be led by the Regional Visitor Strategy Steering Committee and has the potential to grow the regional visitor expenditure from $2.6 billion to $3.55 billion by 2020.

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of $12.8b and 16,000 jobs by 2030.\(^\text{18}\)

The Draft 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 draw-cards 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.
1.5 Barossa Tourism Region

Town of Gawler (TOG) is one of three councils (along with the Barossa Council and Light Regional Council) falling into the designated Barossa tourism boundaries as dictated by the SATC (Figure 2).

As noted above, South Australia is targeting the stretch goal of $8.0b total expenditure by December 2020, and of that total, $273million has been earmarked for the Barossa region. The Barossa region has achieved 70% of its 2020 target reaching $190million at December 2017.

An annual average for the region between 2015-2017 from the SATC Barossa Regional Profile highlighted the following visitor statistics for the region:

- 209,000 visitors who spend 3 nights per trip (642,000 nights)
- Majority of visitors to the region are from Australia (94%) with a small portion from international markets (6%).
- 63% of domestic visitors are from South Australia, with 37% from Interstate.
- The majority of visitors (87%) of visitors Leisure visitors (Holiday + VFR).
- On average 828,000 day trips are taken to the Barossa each year, with an extra 84,000 international day trips.

In 2016-17, the tourism industry directly employed approximately 900 people.

Figure 1 - Barossa Tourism Region Map (SATC)
1.6 Town of Gawler

1.6.1 Project Background

Town of Gawler recognise the increased importance of the visitor economy within their planning frameworks, and as such initially contracted Tourism eSchool, a tourism consultancy based in South Australia, to develop a Cycle Tourism strategy for the Town with the aim of articulating a vision for the growth of the cycle tourism in Gawler.

The development of this Tourism Situation Analysis included a thorough consultative process (see Acknowledgements) with community, industry stakeholders, TOG staff, and state government stakeholders. This document also references relevant national, state, regional and local plans strategies, making it a robust, evidence-based analysis, which offers a clear direction to enhance the visitor economy.

Whilst the original scope of this project was to develop a Cycle Tourism Strategy for the Town, it was identified throughout the consultation process that in order to grow the ‘Cycle Tourism’ niche, the Town needed to focus on growing the whole visitor economy, of which cycle tourism would then be able to be successfully activated.

1.6.2 Town of Gawler’s Priorities

Councils support their communities in a variety of ways and now make a significant contribution to the economic and social well-being of residents. The days of ‘Roads, Rates and Rubbish’ are well and truly in the past.

South Australia is currently facing economic challenges and many regions are competing for residents, business and visitors to maintain viable, healthy communities. With the transition to a serviced-based economy, tourism and events will play a greater role in regional development by attracting new money, supporting jobs and by contributing to the attractiveness of Councils as places to ‘live, work and play’.

TOG is the northernmost Local Government Area of Metropolitan Adelaide and has a population of approximately 23,034 (2016 census). The Council area shares boundaries with the City of Playford to the South and the Light and Barossa regional Councils to the North. The peri-urban landscape of the township acts as an interface between metropolitan and regional Adelaide.

Covering over 41km2, there are a number of differing urban forms and land use characteristics within the Council Area. The South-Western precinct is predominantly rural with large blocks of land for ‘rural living’ and agricultural purposes. The Northern component of the Council Area is largely residential and is concentrated around the Town Centre. Residential precincts directly surrounding the Town Centre are well established and feature a number of state and local heritage items.
TOG plays a significant and diverse role in developing its visitor economy. The base infrastructure and core amenities that are enjoyed in the Town by visitors are largely the product of the work of TOG, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services.

A vibrant visitor economy also unlocks the opportunity for population growth, as there are also strong overlaps between a place being highly liveable and great to visit. So, when visitors enjoy and fall in love with a location, they could decide to move and live locally, which can be a sustainable way to increase the capacity of the Council to deliver on community desires and expectations.

The 2017-2027 Gawler Community Plan highlights numerous objectives that will support the development of the visitor economy. Specific mention of the visitor economy was highlighted under “GOAL 2: Managed and Sustainable Growth” with the following supporting objectives:

2.5 Local economic activity to create local job opportunities and generate increased local wealth

2.5.3 Investigate opportunities for tourism and continue to support investment in tourist accommodation.

It’s clear from the Community Plan’s objectives that TOG is committed to creating a Town that is conducive to supporting the visitor economy, as well as meeting the needs of residents. Tourism is a burgeoning economic driver for the Town, offering a great deal of potential as a destination in itself, and as a base for those wanting to explore the Clare Valley and Barossa Tourism regions.
Whilst there is no specific visitation data for TOG, during 2017/18 the TOG Visitor Centre (TOG VIC) serviced 17,306 visitors to the Town, mainly from Interstate (Victoria, New South Wales and Canberra) with a very small proportion from International markets.

TOG is one of four local government municipalities that fall under the Regional Development Australia Barossa, Gawler, Light + Adelaide Plains (RDA BGLAP) boundaries. RDA BGLAP highlights the visitor economy as a growth industry, and supports the sector through various projects, such as cycle tourism strategy development and capacity building, of which will support TOG in growing their visitor economy.
2. VISITOR ECONOMY INSIGHTS

2.1 Data Sources

In obtaining relevant insights to inform the state of play for the TOG visitor economy, the various data sources and key metrics have been analysed.

The following data sources have been analysed:

**South Australian Tourism Commission (SATC) Barossa Regional Profile, Year Ending December 2017**

The SATC develop regional profiles for all regions across South Australia to offer the most accurate information as it relates to expenditure, number of tourism businesses, international and domestic overnight visitation, and day trip visitation. This data comes direct from the National Visitor Survey (NVS) and the International Visitor Survey (IVS).


**TOG Visitor Information Centre Visitor Statistics**

Staff at TOG VIC enter statistics electronically through the till (which they culminate into month and year databases), detailing all visitors through the door, including their place of origin and length of stay. Raw data is available upon request.

**Visitor Sentiment**

Desktop research has been undertaken for key tourism experiences within the TOG to gain insight and gauge visitor perception of the destination.
2.2 SATC Barossa Regional Profile

2.2.1 Tourism Expenditure

The SATC have reported that the Barossa Tourism Region achieved 70% of its 2020 target ($273million) reaching $190million at December 2017\(^{23}\).

Leading up to the December 2017 result, expenditure for the Barossa tourism region has seen steady growth, with a peak in last year in the timeseries, which aligns with increased marketing investment from SATC for the ‘Barossa - Be Consumed’ campaign over that period.

Figure 3 - Barossa Region Tourism Expenditure 2010-2015\(^{24}\)

The ‘Economic Profile of the Barossa Regional Development Australia Region 2016’ Report, also highlights that expenditure by tourists ($51m) contributed approximately 15 per cent of the total value of exports from the RDA BGLAP region in 2014/15, which also comprised about 1 per cent of the SA total expenditure by tourists in 2014/15 ($5.3b).\(^{25}\)

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\(^{25}\) Economic Profile of the Barossa Regional Development Australia Region 2016 (available from RDA Barossa)
2.2.2 Tourism Jobs + Businesses

In 2016-17, the tourism industry directly employed approximately 900 people, with 500 indirect jobs and a total employment impact of 1,300 people.\textsuperscript{26}

In 2013/2014, the Tourism Industry in the Barossa Region supported 363 businesses.\textsuperscript{27}

\textsuperscript{26} SATC Barossa Regional Profile December 2017
\textsuperscript{27} Tourism Research Australia Barossa Regional Profile, 2013-2014 Tourism Supply Raw Data
2.2.3 Visitor Statistics

Annual Average Visitor Summary December 2015 - December 2017

Data highlights:

- 94% of the Barossa visitors are Domestic visitors and 6% are International visitors.
- Domestically, 63% are from within the state compared to 37% from Interstate.
- 87% of visitors to the Barossa are Leisure visitors (Holiday + VFR).
- On average 828,000 day trips are taken to the Barossa each year, with an extra 84,000 international day trips.

Figure 5 - Barossa Tourism Region Visitation Data Dec 2015 - Dec 2017

<table>
<thead>
<tr>
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<th>Total Domestic</th>
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</tr>
</tbody>
</table>

Sources. Unless otherwise stated, all data in this report is from the International Visitor and National Visitor Surveys (IVS and NVS) Conducted by Tourism Research Australia. These Sources are based on sample surveys and as with all sample surveys, are subject to sampling errors. Caution is required in interpreting some estimates, in particular, regional estimates can be affected by small sample sizes and can be subject to a high level of sampling error. Regional data should accordingly be used with a high level of caution and treated as being for indicative purposes only. Data refers to visitors 15 years and over. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from December 2015 to December 2017.

Notes and Abbreviations. Totals may not add to 100% due to rounding. VFR: Visiting Friends and Relatives. np: Not Published due to small sample size. ALOS: Average Length of Stay ABS: Survey of Tourism Accommodation. Hotels, Motels, Guest houses and Serviced Apartments with 15 or more rooms.
2.2.4 Barossa Region Tourism ‘Appeal’ Insights

Below are the results from Consumer Surveys conducted by SATC and Tourism Australia and is available in the Barossa Regional Profile

Interstate

- Wine resonates with interstate visitors.
- Activities found attractive, e.g. festival / bike ride / hot air balloon.
- Perception of the destination as 'high end' for some.

Intrastate

- A well-known destination and lots more hidden secrets among those who know e.g. farmers markets, rose garden, Angaston.
- Activities such as hot air balloon also appeal and have the potential to trigger a visit. International  ● Highly appealing winery region.
- Visiting Jacobs Creek is the top experience.
- Vintage festival and Whispering Wall also very popular.

Regional Visitor Strategy Priorities

- The main priority for driving future growth to the Barossa is to increase overnight visitation from interstate and overseas markets. While the region receives four day-trip visitors for every overnight visitor, overnight visitors deliver over two thirds of total spend.
- Accommodation improvements and developments will be crucial to the region.
- The Barossa needs to leverage established global marketing platforms such as Ultimate Winery Experiences and Great Wine Capitals of the World for promoting the region.

NOTE. Appeal data is from the consumer surveying conducted for the SATC by BDA Marketing Planning. Sample of 800 interstate travellers and 400 interstate travellers, followed by eight focus groups in Adelaide, Sydney and Melbourne. Comments relating to International appeal are sourced from the Consumer Demand Project run by Tourism Australia in 11 priority markets, with a sample of 1,600 per market.

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28 SATC Barossa Regional Profile 2016-2018
2.3 TOG VIC Visitor Statistics

Staff at TOG VIC record electronically through the till visitation statistics (which they culminate into month and year databases), detailing all visitors through the door, including their place of origin and length of stay.

Important Note. This data is not reflective of all visitors to the Town, just those who enter the VIC or who are serviced on the phone. Therefore, data should be used as an indicator of tourism visitation only.

2.3.1 Visitor Data Highlights

- Total number of visitors serviced (in person and on phone) has declined from YE’15 - YE’18, with the biggest change between YE’16 and YE’17
- Majority of visitation is from the domestic market, in particular the Interstate Market
- Over the timeseries, the majority of interstate visitors are from VIC (31.3%) and NSW/ACT (27.2%)
- Over the timeseries, the majority of International visitors are from Europe (31.6%) and Other Asia (23.3%)

Figure 6 - TOG VIC, Total Visitors Serviced (in person + phone)
Figure 7 - TOG VIC, Total Domestic Visitors vs Total International YE2015-YE2018

Figure 8 - TOG VIC, All Market Comparison, YE2015-YE2018
Figure 9 - TOG VIC, Interstate Visitor Profile YE2015-YE2018

Figure 10 - TOG VIC, International Visitor Profile YE2015-YE2018
2.4 Visitor Sentiment

Desktop research on TripAdvisor, Google and Instagram can provide insights into visitor sentiment. The insights below are purely qualitative, and they lack quantitative measurement of Sentiment and likelihood of future advocacy.

Overall, sentiment for the Council owned assets are very high (mostly 4 star), and comments regarding the assets are very positive, with only a few negative comments. However, there is great opportunity to increase online reviews and advocacy for the Towns Council owned, Community and Private Tourism Experiences.

### Table 1 - Digital Visitor Sentiment for Key Tourism Experiences in TOG

<table>
<thead>
<tr>
<th>Product / Experience</th>
<th>Product Category (Activity / Attraction)</th>
<th>TripAdvisor</th>
<th>Google</th>
<th>Instagram</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td># Reviews</td>
<td>Star Rating</td>
<td># Reviews</td>
<td>Star Rating</td>
</tr>
<tr>
<td>Gawler Visitor Information Centre</td>
<td>Attraction</td>
<td>27</td>
<td>4.5</td>
<td>44</td>
</tr>
<tr>
<td>The Civic Centre (note - no online listings for the Heritage Collection or the Heritage Gallery)</td>
<td>Attraction</td>
<td>8</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>Niina Marni Cafe</td>
<td>Restaurant</td>
<td>1</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Pioneer Park</td>
<td>Park / Attraction</td>
<td>10</td>
<td>4.5</td>
<td>51</td>
</tr>
<tr>
<td>Barossa Trail (formerly Jack Bobridge Track)</td>
<td>Activity</td>
<td>5</td>
<td>2</td>
<td>#jackbobbridgetrail #jackbobridgepark #jackbobridgebikeway</td>
</tr>
<tr>
<td>Stuart O’Grady bikeway</td>
<td>Activity</td>
<td>3</td>
<td>4.5</td>
<td>4.4</td>
</tr>
<tr>
<td>Gawler Main Street Walking Tour</td>
<td>Activity</td>
<td>1</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>Gawler Train Station</td>
<td>Attraction</td>
<td>2</td>
<td>4</td>
<td>20</td>
</tr>
<tr>
<td>Attraction/Activity</td>
<td>Count</td>
<td>Rating</td>
<td>Attendance</td>
<td>Hashtags</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>-------</td>
<td>--------</td>
<td>------------</td>
<td>----------</td>
</tr>
<tr>
<td>St George's Anglican Church</td>
<td>3</td>
<td>4.5</td>
<td>3</td>
<td>3.7</td>
</tr>
<tr>
<td>Gawler Lions Station Market</td>
<td>Event</td>
<td>2</td>
<td>3.5</td>
<td>4</td>
</tr>
<tr>
<td>Deadman's Pass Reserve</td>
<td>Attraction</td>
<td>136</td>
<td>4.4</td>
<td>#deadmanspassgawler</td>
</tr>
<tr>
<td>Gawler Self-Drive Tour</td>
<td>Activity</td>
<td>2</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>Apex Park</td>
<td>Attraction</td>
<td>101</td>
<td>4.4</td>
<td>#apexparkgawler</td>
</tr>
<tr>
<td>Light Square</td>
<td>Park</td>
<td>1</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Clonlea Park</td>
<td>Park</td>
<td>132</td>
<td>4.5</td>
<td>#clonleapark</td>
</tr>
<tr>
<td>Gawler Caravan Park</td>
<td>Accommodation</td>
<td>37</td>
<td>4.5</td>
<td>105</td>
</tr>
<tr>
<td>Paridla Taikondi Park</td>
<td>Park</td>
<td>16</td>
<td>4.5</td>
<td></td>
</tr>
<tr>
<td>Clonlea Reserve Dog Park</td>
<td>Park</td>
<td>18</td>
<td>4.8</td>
<td></td>
</tr>
<tr>
<td>Gawler Skate Park</td>
<td>Park</td>
<td>16</td>
<td>4.2</td>
<td></td>
</tr>
<tr>
<td>Gawler National Trust Museum</td>
<td>Attraction</td>
<td>2</td>
<td>2.5</td>
<td></td>
</tr>
<tr>
<td>Gawler Community Gallery</td>
<td>Attraction</td>
<td>2</td>
<td>4.5</td>
<td>#gawlercommunitygallery</td>
</tr>
</tbody>
</table>
2.5 Macroeconomic Environment

There are many macro environmental factors impacting local, national and global visitor economies. Although the influence on these variables are outside the control of the TOG, destinations can, to some extent, adapt to changing circumstances. Below are several elements in the macro environment that affect the number of visitors and visitor nights to the TOG region.

2.5.1 Consumer Confidence

Consumer confidence indicators measure the degree of optimism or pessimism that consumers feel about the overall state of the domestic economy and their personal financial situation. When the level of consumer sentiment is high (for example, greater than 100) consumers are more likely to increase their spending on discretionary (or non-essential) items including travel. Should the level of consumer sentiment be low, consumers tend to be more inclined to cut back on discretionary spending and increase their savings.

For the most part high consumer sentiment (greater than 100) should result in more domestic visitation to the TOG, and therefore, currently (2019) the region could expect an increase in visitation. However, given travel is a discretionary spend, the TOG will be exposed to swings in consumer sentiment.

Figure 11 - Consumer Confidence Index, 2009-2019

![Figure 11 - Consumer Confidence Index, 2009-2019](https://tradingeconomics.com/australia/consumer-confidence)
2.5.2 Interest Rates

The domestic interest rate level is a key macroeconomic variable which impacts domestic visitor numbers. Rising interest rates increase the cost of Australian loans and mortgages which then detracts from discretionary spending on luxury items such as travel.

However, not all Australia's own homes and have mortgages. As well as having an impact on mortgage interest rates, the cash rate (the domestic interest rate level) also impacts on domestic savings interest rates, which can have positive implications for domestic tourism.

The consistently low (record breaking) interest rates (as highlighted below) has certainly encouraged Australians to spend on discretionary items like travel, however, it may have caused the decline in day trip visitors as potential visitors seek international travel instead of domestic.

Figure 12 - Australian Interest Rate Index, 2009-2019

Trading Economics, Australian Interest Rate Index, 2008-2018 > [https://tradingeconomics.com/australia/interest-rate](https://tradingeconomics.com/australia/interest-rate)
2.5.3 Exchange Rates

The Australian dollar has had something of a turbulent recent history. Fluctuating frequently, in January 2016 it reached a low of 0.69 against the USD. Since then it has been slowly rising (with persistent peaks and troughs), until, in July and September 2017, it was valued at above 0.80 to the USD.\(^{32}\)

If the value of the AU dollar continues to rise, Australia will become less attractive to international tourists, who will find Australia a far more expensive destination to visit than it was previously. Likewise, domestic tourism may also shrink, with Australians who would normally holiday at home deciding they can afford to go elsewhere.

Figure 13 - AUD / US Exchange Rate History, 2009-2019\(^{33}\)

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\(^{32}\) Trading Economics, Australian Interest Rate Index, 2008-2018 > [https://tradingeconomics.com/australia/currency](https://tradingeconomics.com/australia/currency)

\(^{33}\) Trading Economics, Australian Interest Rate Index, 2008-2018 > [https://tradingeconomics.com/australia/currency](https://tradingeconomics.com/australia/currency)
2.5.4 Travel Forecasts

Australia’s tourism sector remains a shining light for the nation’s economy, with strong growth in both international and domestic visitor numbers. The strong national growth is a huge opportunity for TOG, and offers the town the foundation to continue to build momentum for tourism.

Global

International conditions continue to improve with the global economy forecast to grow by 3.5% in 2017 and 3.6% in 2018.

The outlook for advanced economies is improving as well, with forecast growth of 2.0% for both 2017 and 2018, slightly above growth for 2016. This growth is underpinned by increasing consumer confidence and an upturn of business investment in major advanced economies such as the US, Japan, the UK and Canada.

Emerging economies are expected to grow unevenly overcoming years. Resource and energy-exporting economies such as Russia and Brazil are projected to experience low growth after contracting in 2016. Asian economies, however, including China, India and Indonesia, are performing relatively well with annual rates of growth in excess of 5.0% over the forecast period. In net terms, emerging economies are forecast to grow by 4.5% in 2017 and 4.8% in 2018. The overall picture of the world economy remains positive.34

National

International Travel

- International visitor numbers to Australia are expected to increase 13.1%, from 8.6 million in 2016–17 to 9.2 million in 2017–18 and 9.7 million in 2018–19. Asia will continue to outperform other overseas markets over this period, brought about by increasing prosperity and the continuing transition of millions of people into consumer oriented, middle-class populations.35
- Traditional markets (UK, USA, NZ) will still see moderate growth but not as strong and consistent as the Asian markets.36
- The growth Australia is experiencing is the fastest in a generation and is seeing it outpace both global performance and travel across the Asia Pacific. In fact, international visitation to Australia is growing at nearly three times the rate of global travel.37

37 Deloitte Access Economics’ latest Tourism and Hotel Market Outlook report
**Domestic Travel**

- In 2017-2018, Australian economic growth is expected to remain at below its historical average, and where discretionary expenditure may be reined in by slower growth in capital city house prices (particularly in Sydney and Melbourne) and by sluggish wage growth. 38
- However, as economic growth picks up through 2018–19, and the Australian dollar remains near its long-term average, there will be a commensurate increase in domestic tourism activity. 39

**South Australia - State**

South Australia has been identified as one of the top 4 States in Australia forecast to see the most growth in 2017-2018, with total visitor nights increasing 4.8% over the year to 34 million nights; the result of a 2.7% increase in domestic nights and a 9.0% increase in international nights.40

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.41

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However, state growth will slow down over 2018-2019 to 3.8% (down 1%) due to a decrease in international visitation (down 3%), while the domestic market remains steady at 2.7% growth.\textsuperscript{42}

Ten year forecast data also indicates that regional tourism’s share of South Australian visitor nights is expected to decrease from 47% to 43% between 2016–17 and 2026–27, a trend that consistent with all regions in all states in Australia. 43

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3. MARKET SEGMENTATION

3.1 Current Markets

3.1.1 Geographic

Domestic Market

Intrastate visitation is currently the most significant market for the Barossa Tourism Region with 62% of all overnight visitors originating from within South Australia. Intrastate visitation is dominated by visitation from people originating from Adelaide (47%) with visitors from Regional SA also a noteworthy market (15%).

Just over a third of all overnight visitors to the region are interstate visitors (38%), with overnight visitors originating primarily from Victoria (13% Regional and Melbourne) and New South Wales (Regional and Sydney total 11%). Additionally, over half of domestic visitors to the Region are coming for a holiday (53%), with a third Visiting Friends and Relatives (VFR). 44

Statistics taken at the TOG Visitor Centre identified consistent profiles, with Intrastate (Gawler, Adelaide and Regional SA) as being their largest visitor market, followed by the Interstate market, primarily from Victoria and New South Wales (see Section 2).

The Gawler Caravan Park identified the majority of their visitors were VFR. 45

International Market

International visitors to Region currently comprise a very low proportion of overall visitors (6%). Of international visitors, the majority (69%) come for a holiday, with 23% coming to visit friends and family. Geographically, these visitors are from traditional Western markets, with 52% from United Kingdom (20%), America (15%) and New Zealand and 14%. 46

44 SATC Barossa Regional Profile (2016-2018)
45 Consultation with Ali Gebhardt, July 2019.
46 SATC Barossa Regional Profile (2016-2018)
3.1.2 Generational

**Silent Generation (aged 76-96) + Baby Boomers (aged 55-75)**

The Silent Generation (aged 76-96 in 2019) and Baby Boomers (aged 55-75 in 2019) are currently the largest generational market for the Town, with the majority of current visitors to the Town aged 55+ (43% Domestic, 51% International).\(^{47}\)

Visitors to the region are overrepresented by this generational segment (majority 65+), they are more likely to be older couples without children in the household, retired, and have similar interests on holiday. They tend to have above average household income and stay even longer when on an Australian holiday.\(^{48}\)

**Generation X and Millennials**

Generation X (aged 40-55 in 2019) and Y (aged 25-39 in 2019) also form an important part of the Town’s current visitor profile (47% Domestic, 41% International).\(^{49}\)

3.1.3 Psychographics

**State Personas**

Currently, the SATC has identified the high yielding global experience seeker, and nuances within this segment, as the customer segment in which they will be targeting.

The global experience seeker\(^{50}\) are:

- A global target audience united by values, attitudes and motivations in life, far beyond travel;
- Well educated, interesting, open-minded, happy, positive people who actively enjoy their lives;
- Motivated by opportunities for personal growth and self-fulfilment;
- ‘Doers’ not just talkers;
- Opinion leaders and advocates within their social circle;
- Searching for new experiences they can ‘brag’ about; and
- Demanding and discerning about brands and communication.

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\(^{47}\) SATC Barossa Regional Tourism Profile (2016-2018)
\(^{48}\) Celcius Research 2015/2016 Clare Valley + Burra Tourism Project
\(^{49}\) SATC Barossa Regional Tourism Profile (2016-2018)
3.2 Growth Markets

3.2.1 Geographic

Intrastate

Whilst South Australia had a slight increase in growth from intrastate markets (1% overnight visitors and 2% in nights\(^\text{51}\), which is low in comparison to National growth rates of 9% and 8% respectively) by the December 2018 Quarter, the outlook for all domestic overnight visitation is positive (with an overall 5-year growth rate of 2.2% for domestic market).\(^\text{52}\)

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

Strategic positioning of the Town as a multi-night destination for high yielding visitors and niche interest segments and markets will be key to successfully converting this source market.

Interstate

South Australia saw a 11% increase in overnight visitor numbers by the December Quarter 2018, and a 7% increase in nights from the same segment in the same timeframe (with growth rates are higher than the national average of 8% and 6% respectively).\(^\text{53}\)

The state growth, along with positive forecast growth for domestic overnight visitors to the state\(^\text{54}\) offers a significant opportunity for the Town to target more visitors from current interstate source markets where destination awareness and current visitation statistics are positive (Victoria, NSW). There will also be opportunity to leverage those interstate visitors planning visits to the Barossa and Clare Valley by targeting day-trip and / or additional overnight stays.

Working collaboratively with key stakeholders, and strategically marketing the Town will be the key to driving increased visitation from this source market.

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International

Whilst international visitors currently comprise an extremely small proportion of overall visitors to the Town, positively trending growth and forecasted positive growth (5-year annual growth rate of 5.5% for international market) of this market at a state level\(^5\), an impressive average length of stay and spend per visitor (Figure 17).

Working with key stakeholders across industry and government will be key to increasing demand from this market. Additionally, increasing destination awareness in the Adelaide market could present opportunities to capture international VFR visitors staying in Adelaide, in addition to working with stakeholders to leverage the increasing number of international visitors who are planning holidays to neighbouring tourism regions.

**Figure 17 - Differences in Visitor Behaviour by Origin September 2018**

<table>
<thead>
<tr>
<th>INTERNATIONAL</th>
<th>INTERSTATE OVERNIGHT</th>
<th>INTRASTATE OVERNIGHT</th>
<th>DOMESTIC DAY TRIPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>$2,492</td>
<td>$885</td>
<td>$477</td>
<td>$119</td>
</tr>
<tr>
<td>AVG SPEND PER VISITOR</td>
<td>AVG SPEND PER VISITOR</td>
<td>AVG SPEND PER VISITOR</td>
<td>AVG SPEND PER VISITOR</td>
</tr>
<tr>
<td>22 NIGHTS</td>
<td>5 NIGHTS</td>
<td>3 NIGHTS</td>
<td>N/A</td>
</tr>
<tr>
<td>AVG LENGTH OF STAY</td>
<td>AVG LENGTH OF STAY</td>
<td>AVG LENGTH OF STAY</td>
<td>AVG LENGTH OF STAY</td>
</tr>
<tr>
<td>461,000</td>
<td>2,451,000</td>
<td>4,100,000</td>
<td>13,778,000</td>
</tr>
<tr>
<td>VISITORS</td>
<td>VISITORS</td>
<td>VISITORS</td>
<td>VISITORS</td>
</tr>
</tbody>
</table>

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

\(^5\) Tourism Research Australia, International Visitor Survey, YE 2018
The China Proposition

In 2016, China was the second largest inbound market for visitor arrivals, and the largest market for total spend and visitor nights, contributing a whopping $9.2 billion to the Nation’s economy (11% growth from previous year).56

The Free and Independent (FIT) China traveller is fast becoming a boom market for the Australia mainly and key regions, with the market potential to be worth up to $13 billion by 2020.57

The China visitor market remains an attractive proposition and is currently flagged as one of the South Australia’s highest yielding inbound market spending approximately $7895 per trip58.

The Chinese market are motivated to travel to experience 4 key themes – Nature, Food, Wine and Wildlife.59

- Nature – Australia has always been considered a great place to offer accessible nature, but of more recent times, the appeal has expanded to include more physical engagement with all things natural, including the land, wildlife and produce, and the people.

- Food + Wine – The Food and Wine proposition is still a strong motivator for the market, with the personal connection Chinese have with their food and the connection to nature they can get from wine experiences, more so than the appreciation of the product. There are also major bragging rights associated with world-renowned brands and experiences too.

- Wildlife – The Australian wildlife show will never disappoint the Chinese traveller, particularly the immersive experiences, where they can have close encounters with animals. Given that a lot of the wildlife encounters are in regional locations, it is important to ensure messaging around accessibility is positive.

Tourism Australia, SATC, Tourism Barossa Inc and other Government agencies are currently investing significant funding into projects and strategies to attract this market, which means there will be, undoubtedly, many relevant opportunities made available to the Town to leverage.

56 Tourism Australia China Market Profile 2016
57 Tourism Australia China Market Profile 2016
58 South Australian Tourism Commission – Activating China 2020
59 SATC Delivering quality SA experiences and infrastructure for Chinese Visitors, July 2016
3.2.2 Generational

**Baby Boomers**

Research suggests that targeting Baby Boomers (aged 55-75 in 2019) is very much a lucrative opportunity for the Town, 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 segment\(^{60}\)
- 40% of Australian travellers 55+ plan to spend between $10k – $50K per person per annum on travel. \(^{61}\)
- The market size is growing, from 15% of total Australian population in 2017, to approximately 20% in 2037\(^{62}\)

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. \(^{63}\)

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

- Are the most destination decisive of the generations with 67 percent 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. \(^{64}\)

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. \(^{65}\)

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\(^{61}\) [https://www.newyoungconsulting.com/seniors-travel-research-report/](https://www.newyoungconsulting.com/seniors-travel-research-report/)
\(^{63}\) [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=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad](https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad)
\(^{64}\) [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=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad](https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad)
\(^{65}\) [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=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad](https://info.advertising.expedia.com/hubfs/Content_Docs/Rebrand-2018/Australian%20Multi-Generational%20Travel%20Trends-Small.pdf?hsCtaTracking=dbe27bbd-abf5-4e41-83c7-6a022611ca6f%7cb9a4e4ed-4268-446b-a52b-b06e880ac1ad)
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.

The Town already attracts a significant proportion of Senior travellers (refer. Section 3.1.2), however, the key to leveraging this market will be to identify what personas will represent the high yielding visitors within this broader generational segment, as those at either end of the spectrum exhibit significantly different attitudes, behaviours, and spending patterns, which need to be taken into consideration when it comes to successfully marketing to them.

**Millennials**

Whilst the Baby Boomers are the low hanging fruit, it would be remiss to discount the potential of the younger markets, who, whilst they represent a smaller part of the current visitor profile to the Town in comparison to the 55+ market, 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:

- 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. 66

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 difference 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. 67

Generation Z travellers represent a very small proportion of current travellers to the Town68, have similar predispositions to travel as the Millennials, with the following differences:

- The 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)

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66 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?hscCtaTracking=dbe2b9bb-abf5-4c4f-b3c7-6af62261ba6f%7Cbc5b94e4c4-2428-4780-46a-a524-b06e8860b1ad
67 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?hscCtaTracking=92bc2b9bb-abf5-4c4f-b3c7-6af62261ba6f%7Cbc5b94e4c4-2428-4780-46a-a524-b06e8860b1ad
68 SATC Barossa Regional Tourism Profile 2016-2018
• 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.69

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

• The take the most trips per year our of any generational segment (nearly 8 trips between them)
• The activities they want to experience align well to what the Town has to offer (museums, arts and culture, historical sites, and outdoor and adventure.)
• 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%.70
• 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 15-44.71
• 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”.72

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 Town must focus on attracting customers with similar aspiration and interests, and not just define customers their age.

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69 Australian Multi-Generational Travel Trends Report 2017
72 Roy Morgan Holiday Tracking Survey (Australia) April 2017 – March 2018
3.2.3 Life Stages

Families

Family travel in Australia is dominated by domestic travel, despite growth in families travelling overseas. 73

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%). 74 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. 75

Research into the Family Market by Destination New South Wales 76, 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 Town is well positioned to cater for families, and in particular the caravan and camping market, given the Town’s centrally located Gawler Caravan Park which connects to outdoor and nature-based experiences (via cycle/walking trails), Clonlea Skate Park, National Trust Museum, Civic Centre, events and family friendly dining options. However, changing the perception of the Town as being “not much to do” is key challenge to overcome with the attraction of the intrastate based families customers.

SINKs and DINKs

Single Income No Kids (SINK) and Double Income No Kids (DINKS) are both attractive market segments for the Town.

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. 77

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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. 78

The experience themes and events within the Town (identified in section 4) are conducive to attracting this life stage, particularly across the Baby Boomer-Millennial generational segments, and therefore represent a great growth opportunity.

3.2.4 Niche Interest Segments

Art, Culture and Heritage Tourism

Australia’s strong Aboriginal culture and modern European history means there are opportunities to build visitation in Australia’s arts, cultural and heritage segment. Arts, Cultural and Heritage Tourism visitors can be classified as visitors who participate in activities for the enjoyment of arts, culture and heritage with activities including:

- Visiting heritage buildings, sites and monuments
- Visited museums or galleries
- Attended theatre, concerts or other performing arts
- Visited art/craft workshops/studios
- Attended festivals/fairs or cultural events
- Experienced First Nations art/craft and cultural displays
- Attended a First Nations performance.

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. 79

From an International Perspective in 2017, 65% of South Australia’s international visitors engaged with the arts, while three quarters (75%) of international tourists who visited regional SA were arts tourists, compared to two thirds (66%) of tourists who visited Adelaide80.

The South Australian government has a focus on this sector, with the development of the SA Heritage Tourism Strategy by the Department of Environment and Water (due for delivery 2020) presenting opportunities for the Town to grow new and activate existing cultural and heritage experiences.

TOG has excellent Arts, Culture and Heritage potential, with the recent opening of the Civic Centre, which houses the Gawler Heritage Collection, Heritage Gallery and Niina Mani Café (South Australia’s only Aboriginal Café) and their new Bush Tucker Tours. The Town is also home to the Old Telegraph Station Museum, Historic Walking Trails, many Historic

78 TRA National Visitor Survey Report (December 2018)
buildings, festivals and events and important Kaurna sites such as along Gawler’s three rivers. A key opportunity is continuing activation of existing and development of new experiences and events, as well as increasing awareness via strategic marketing and visitor servicing activities. The Town of Gawler Arts and Culture Strategy 2016 – 2025 also outlines many actions which will also support the growth of experiences in this sector in the Town.

**Cycle Tourism**

Cycle tourism has been identified globally, by the United Nations World Tourism Organisation\(^{81}\), as a key growth adventure tourism activity due to its low-impact and high-spend nature. Not only is cycle tourism more sustainable environmentally, socially and economically but it also disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies.

Cycle tourists can be categorised under two main market segments;

- Those who travel to a destination to cycle – those who are cycle enthusiasts who regularly travel with cycling as a primary motivator, and;
- Those who undertake incidental bike riding whilst on holiday – typically leisure cyclists where cycling is an incidental activity and plays no part in influencing travel behaviour.\(^{82}\)

Cycle tourists typically stay longer, spend more and engage in a broader range of experiences than the average visitor, and as a result, can become a driver for increased economic prosperity for regional destinations. Studies have identified that whilst a cycle tourist’s average daily spend is slightly higher than domestic visitors, their overall trip spend is nearly five times as high.\(^{83}\)

Other key characteristics of cycle visitors include;

- They have a higher propensity to travel to regional areas, and high tendency to become repeat visitors to a destination
- They average daily spend is $124 per night, average length of stay is 16 nights (compared to 5 nights for the average overnight visitor in South Australia\(^{84}\)), and total trip expenditure is approximately $2000 per domestic cycle tourist and $5,005 per international cycle tourist\(^{85}\)
- Twice as many cyclists travel on a long trip (5-night stay or more) to interstate regional destinations as those travelling to intrastate destinations (18% vs 8%)\(^{86}\)
- They love fine wine, good restaurants (68%) and outdoor activities in natural environments (82%)\(^{87}\)
- Cycle tourists typically travel at least three times per year, which suggests that cycle tourism is a niche but high engagement activity\(^{88}\)

\(^{84}\) SA Draft Tourism Strategy 2030
\(^{85}\) Faulks, Ritchie & Plucker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC
\(^{87}\) EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young
\(^{88}\) EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young.
In terms of motivations, the cycle tourism market is dominated by cyclists who travel to destinations primarily because of the routes, trails, the riding experience that the destination offers, and events are also a key driver of travel motivation, as well as destination and facility awareness.

Between 2009-2014 the percentage of tourists that cycled in Australia increase by 25% by visitor number and 16% by visitor nights. In 2014, more than 2.9 million tourists in Australia cycled. In 2014, 1.1% of all Australian visitors participated in a cycling activity during their trip, while 5% of international visitors cycled.\(^{89}\)

For the year end September 2018, 46,000 international visitors to SA undertook cycling as an activity somewhere in Australia (10% of all international visitors to SA), and 112,000 domestic overnight visitors to SA cycled while here (approx.1.7% of domestic overnight visitors to SA).\(^{90}\)

In South Australia, there are trails, tourism experiences and cycling events that bring thousands of visitors to the State. South Australia is a great place to ride as a commuter or for sport and South Australia has some of the most significant bike assets in Australia including Cycling Australia’s High Performance Network and the Tour Down Under – an iconic sporting event and the largest bike business event in Australia.\(^{91}\)

In 2015 a Roy Morgan survey identified that SA had 5 of the top 9 cycling destinations in Australia. Melrose in the state’s Southern Flinders Ranges is one of the top mountain biking destinations, and the Mount Lofty Ranges are being developed as an international mountain bike destination.\(^{92}\)

Whilst the Barossa region isn’t renowned for its cycling proposition, the region has significant cycle tourism potential, with the Barossa Trail (extending from Tanunda to Gawler), the Tanunda – Nuriootpa – Angaston Shared Path, in addition to the Seppeltsfield Road Shared Path, and plans to develop a new Adelaide Wine Capitals Trail, extending from the Clare Valley region, through the Barossa to the Adelaide Hills.

TOG has excellent cycle tourism potential, with the Gawler Rivers Shared Path Network (Tapa Pariara), is a hub linking communities and parks along the North Para to Hewitt and Concordia and the South Para to Gawler East. The Barossa Trail is a cycle gateway to the Barossa from Gawler but also a destination network for cyclists staying in the Barossa, coupled with path links to the Stuart O’Grady Bikeway to Angle Vale. The Town also has a well-managed Bike Hub, co-located with the Gawler Visitor Information Centre.

Future proposed Cycle projects also have great opportunities for Town including the proposed Adelaide Wine Capital Cycle Tourism Trail and the connection of Forestry SA and SA Water Reserves between Mt Crawford, Warren Reservoir, South Para Reservoir, Parra Wirra to Gawler via the South Para River and Deadman’s Pass.

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\(^{90}\) South Australian Tourism Commission, Research Team, (3 year average to September 2018) data received March 2019
3.2.5 Niche Market Segments

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 2018.93

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.94

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.95

TOG is well positioned to attract more of this market (across all generational segments), with the well-appointed Gawler Caravan Park and Gateway Caravan parks (as identified in Section 4)

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 economy96, well exceeding the State Government’s 2020 target of 43 vessels (and $17m expenditure).

The Cruise Market provides opportunities for TOG due to its proximity to Outer Harbour and its location on the way to the Barossa, a popular day trip for shore excursions. Currently TOG is a 45-minute drive from Outer Harbour, and this will be reduced by a further 10 minutes once the Northern Connector opens (scheduled for completion late 2019). Opportunities have been outlined in the Action Plan to grow numbers of independent and shore excursion visitors to the town.

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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.97

In the Barossa, business travel accounts for 15% of total visits, with 12% of nights (domestic + international)98. Whilst Adelaide enjoys 23% of total business traveller visits, and 11% of total nights (domestic + international).99

TOG is home to a number of high-quality business events venues including the Nixon’s Function Centre, the new Gawler Civic Centre, and the Gawler + Barossa Jockey Club. These venues provide TOG with the opportunity to attract small-medium sized business events to the Town.

Due to TOG’s close proximity to Adelaide, it is well positioned to also leverage pre and post touring options for the Meetings, Incentives, Conference and Exhibition (MICE) events in Adelaide through focused product development and marketing efforts.

Business events have been flagged in this Plan as a growth niche segment for the Town, and opportunities within the Action Plan instruct the leveraging of this segment via the Gawler Business Development Group, Barossa Tourism and the Adelaide Convention Bureau.

Sport Tourism

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. For example the Town’s running community hosts a weekly Park Run every Saturday morning at Clonlea Park, which attracts over 100 people each week on average, of which some are visitors.

TOG is home to several quality sporting venues, recreational complexes and picturesque recreational trails and roads100, which offers a promising opportunity to attract more events, participants and spectators to the Town.

Opportunities exist to work collaboratively with the Office for Recreation & Sport, GBDG, Events SA via Barossa Tourism and Local Sporting Clubs/Groups to enhance, identify and secure an increased number of sporting events in the TOG, especially during off peak season.

Sport types would be aligned with the sporting facilities, trails and sporting groups in the town, as well as and visitor’s interests, as either participants or spectators. In addition to cycling specific events (road cycling, mountain biking, BMX), these sports could include running (Park Run, Marathons), swimming, cricket, football, bowls, golf and horse riding.*

*With the variety of sport venues and sporting associations, combined with the lack of a specific Sport Tourism Strategy for South Australia, further research is required to confirm the sport activities most likely to attract the town’s highest yielding customers.

98 SATC Barossa Regional Profile 2014 - 2016
99 Adelaide Tourism profile, December 2016
100
4. STAKEHOLDERS

4.1 Tourism Barossa Incorporated

Tourism Barossa Incorporated (TBI) is an incorporated body and the peak body representing Barossa tourism operators and any local businesses involved in providing services to visitors. It is a not-for-profit, non-government organisation funded by industry (via membership), The Barossa Council, Light Regional Council and the South Australian Tourism Commission. The organisation is managed by a board of industry and stakeholder representatives from across the region.

Objectives and purposes of TBI

- To market and promote the region to maximise visitor yield;
- To optimise the economic value and sustainability of the tourism industry to the region; and
- To enhance the experience of visitors to the region.

The association seeks to achieve this by representing the interests of operators and the Barossa region in the areas of:

- Destination Development: providing advice about best business practice, as well as planning for a sustainable growth across the local tourism industry;
- Destination Marketing: the promotion of the region to potential domestic and international visitors, media and trade; and
- Development of Barossa Festivals and Events.

2017-2019 Destination Marketing Strategy

Customers

TBI place an emphasis on the following markets\(^\text{101}\):

- Local businesses (capacity building/development)
- Interstate and intrastate visitors, and to a lesser extent focus is given to the UK and Greater China markets, and Meetings, Incentives, Conferences and Events (MICE) markets (marketing)

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\(^{101}\) Barossa - Commitment to Target Audiences by Entity – November 2017 (available on request)
The target demographic for the Barossa region overall is defined in Ross Honeywill’s work on the New Economic Order (NEO)\textsuperscript{102}. NEO’s are typically those who:

- Have powerful social and business clout
- Partake in elective, inconspicuous consumption
- Spend more on creating emotional experiences
- Don’t need to surround themselves with overt luxury
- Do want beauty, design, quality, rich information, authenticity, flexibility, provenance and choice

A NEO filter is applied when creating content across all online and offline marketing activities to attract more of this high yielding segment.

**Key Projects Relevant to TOG Visitor Economy**

TBI projects that have been specifically relevant to TOG in 2018/2019 include:

- *Barossa.com redevelopment* – the Region’s consumer website will be undergoing redevelopment in 2019/2020
- *SA Regional Visitor Strategy* to drive the activation of relevant priorities areas for their region.
- *Barossa Vintage Festival and Barossa Gourmet Weekend* are key drivers of visitation and branding for the region overall and will impact potential numbers to TOG.
- *Developing and distributing essential consumer digital and offline collateral* including Barossa.com, Barossa Touring Map and Barossa Regional Visitor Guide, of which key TOG product is highlighted

TBI and TOG collaborate on relevant projects, including the printing of the Cycle Tourism Map for the region.

### 4.2 Gawler Business Development Group

The Gawler Business Development Group Inc. (GBDG) role is to help businesses located in TOG compete in an increasingly competitive market. The GBDG is currently contracted under a funding agreement by the TOG to deliver services to the business community until 30 June 2021, with an option to extend for a further 1 year period (maximum term of 3 years funding through to 2022), with an investment of minimum of $170,600 + GST (plus CPI) per annum. This investment is funded by commercial and industrial businesses within Gawler and collected by ToG through a Separate Rate.

GBDG goal is to improve the viability of Gawler businesses, promoting the economic benefits of conducting business in Gawler to potential new businesses and assisting all current and intending business to grow through providing services tailored to meet the individual needs of each business. There are over 500 members, including all key accommodation, food, dining and entertainment businesses operating in the Visitor Economy.

\textsuperscript{102} Ross Honeywill’s NEO definition > [https://rosshoneywill.com/neos/](https://rosshoneywill.com/neos/)
Key Projects Relevant to TOG Visitor Economy

- Dedicated page on GBDG website sharing the ‘Gawler and Surrounds Cycling Guide’
- Support for development of new events in TOG, eg. they are currently investigating bringing a Triathlon to the town.
- Marketing assistance to events and tourism businesses as required
- Listing of all Tourism Businesses and some Community Events on the GBDG Website (https://gawler.org.au/) under their business category type (eg. Accommodation, Dining, Entertainment).
- Promotion of Events and Tourism Businesses on an adlib occasion via their social media channels.
- Marketing of community events and social media channels.
- Industry Development via events, workshops, forums and networking nights
- Menu Translation Project – working with cafes and restaurants to have menus translated into Chinese, in collaboration with RDA Barossa
- Liaise between businesses and council, issues with development/planning

4.3 Gawler Wheelers

The Gawler Wheelers (GW) are a road cycling group based in Gawler. The GW are one of South Australia’s largest and most active cycle groups with over 360 members. Regular social group rides are held every Saturday morning (ages 16 plus) leaving and returning from a central location in Gawler.

Through the group’s online activities, they are key advocates of Gawler as a cycle destination for the road cyclist community within South Australia. The activities include:

- [Gawler Wheelers Facebook Group](#) – Posting of weekly social rides and ride notes
- [Adelaide Cyclist Online Community](#) – Sharing engaging weekly Ride Reports
- [Bike SA Free Rides Program](#) – Saturday social rides promoted to all SA Bike SA members.

**Gawler and Surrounds Cycle Guide**

The Gawler and Surrounds Cycle Guide (available here) was developed by Paul Koch (at his own cost) to share cycle routes around the Town and in the surrounding regions. He is an active GW leader and current TOG Elected Member. The guide is currently only available on the GBDG website.
4.4 Regional Development Australia - Barossa, Gawler, Light + Adelaide Plains

Regional Development Australia are a regionally based, not for profit organisation that, in collaboration with industry, community and governments, facilitates and supports regional economic development and jobs growth.

Regional Development Australia Barossa (RDA BGLAP) is a partnership between the Federal and State Government and Local Governments (Town of Gawler, Adelaide Plains Council, The Barossa Council and Light Regional Council) to develop and strengthen the Barossa regional community. These three levels of government have invested in RDAB to deliver economic development services in the Barossa region.

Specifically, RDAB supports the region by offering:

● Investment Attraction and Regional Information
● Industry Development and Investor assistance
● Access to business services and growth strategies
● Skills training access
● Workforce planning and development
● Advocacy and business case development for regional infrastructure and investment
● Community consultation and facilitation

Key Projects Relevant to TOG Visitor Economy

In 2018/2019 RDAB have actively been working on the following projects which have a direct and potential impact on tourism in the TOG:

● Proposed Adelaide Wine Capital Cycle Tourism Trail
● Proposed connection of Forestry SA and SA Water reserves into South Para River and Dead Man’s Pass
● Art Music Design Barossa – Bringing together the creative communities of Barossa, Gawler, Light, Adelaide Plains in a virtual hub for ideas and inspiration, and connecting creatives with events, venues, suppliers and customers (http://artmusicdesignbarossa.org.au/), Development of Literary Trail in progress.
● Sector development (Wine, Food, Tourism) to becoming internationally ready, customer service, and sales + marketing, coop events.
● New Market activation – China ready strategy and industry development (via China ready toolkit)
● Cash contribution to Gawler and Surrounds Cycle Guide

TOG Financial Contribution

● TOG has recently committed to a three-year funding agreement with RDA with an estimated approximate commitment of $120,000 over three years.
● TOG’s CEO is a representative on the RDAB Board.
4.5 The Barossa Council

As one of TOG’s bordering LGAs, The Barossa Council is a long-standing stakeholder for the TOG in many Local Government economic interests, one being tourism. The Barossa Council has a strong interest in Tourism, and since 2009, has been financially responsible for all operations undertaken by the Barossa Visitor Information Centre (BVIC).

The BVIC is a Nationally Accredited Visitor Information Centre, is co-located with The Barossa Council’s Library Branch in Tanunda, and open seven days a week. The BVIC is one of the busiest Centre’s in the state, employing 9 staff and 15 volunteers and fielding 60,000+ enquiries annually. They provide a wide range of visitor services and facilities and pride themselves on offering more than the traditional Visitor Information Centre model.

Since the Barossa Council took ownership of the BVIC, it has spent considerable resources setting up and maintaining an online booking system to process visitor bookings for accommodation, tours and events.

The BVIC introduced a ‘participation agreement’ to support businesses located outside of the Barossa Council boundaries in the same way they do Barossa Council ‘rate-paying’ tourism businesses, who sought promotional support from the BVIC. The participation agreement outlines that for $100 (inc GST) per annum, tourism product can subscribe to the same promotional support offered to businesses located within the Barossa Council municipality.

How TOG and BVIC currently work together

- BVIC have participation agreements with one business located in the TOG, with positive feedback on the agreement. Anecdotally, most accommodation bookings for TOG from the BVIC are processed when Barossa accommodation product is full during events, or if visitors are looking specifically for accommodation in Gawler.
- TOG has recently (2018) been working with the Barossa Council, in addition to RDAB, Light Regional Council and TBI on maintaining the Barossa by Bike Cycle Tourism Map for the region. This involves funding the printing of the publication (graphic design historically funded by RDAB), and copies supplied to the Gawler Visitor information Centre to distribute as required.
- BVIC also rack and distribute Gawler tour brochures at the visitor centre at no cost.
4.6 Light Regional Council

Light Regional Council (LRC) have recently endorsed a new 2018-2023 Tourism Plan in August 2018 and are working toward the attainment of their objectives.

Similar to the Barossa Council, Light Regional Council (LRC) own and manage the Kapunda Visitor Information Centre (KVIC), which is a nationally accredited Visitor Information Centre which is co-located with the Kapunda Community Library.

The centre is home to the offers a range of services, and the basement’s home to a small Interpretive Centre which navigates the visitor through the Light region (using interactive maps, movies and information), from its history and the characters who shaped the region to the present.

How TOG and KVIC currently work together

The KVIC and TOG VIC teams communicate to share information and ideas periodically.

4.7 National Trust of SA Gawler Branch

The Gawler Branch of the National Trust of South Australia (NTSAG) is a volunteer committee established in 1965 and operates the Gawler Telegraph Museum in Gawler’s Main Street. As well as keeping the museum open, activities the Committee undertakes includes school and group tours by arrangement, special events and history walking/coach tours by arrangement.

Key Projects relevant to TOG Visitor Economy

- Open and maintain the Gawler Old Telegraph Station Museum (Open Tuesday to Friday, 1 – 4pm)
- Museum Group Tours on appointment (Currently receive around 6 per year)
- School Program on appointment. A Year 5 Curriculum module is delivered based around Migration to Gawler. The program is mainly taken up by local private schools, as they have had trouble finding the right person at public schools to approach about the program.
- Town Bus Tours on appointment (Around 6 per year). A NTSAG volunteers take tours around Town, focusing on niche topics such as “Grand Homes of Gawler” and “Gawler Cemeteries”
- Bring TOG Heritage stories to life via grant funding. For example, they were recently successful in receiving a small grant to create an interpretive display at Eagle Foundry B+B to tell Foundry Story.
- Special Events that bringing people together based around Gawler’s history. The two most recent, and highly successful events were:

• ‘Migration to Gawler post WW2’. They ran an event bringing 50 people together whose families migrated to Gawler in 1948/1956. Major success
• ‘Timer Fashions’ - From single Sunday Mail ‘Can you Help’ classified Add, they brought together 85 past employees for event in town (Myer Emporium Clothing Manufacture in Gawler)

- Information Flyers. These tell the stories of key historic feature of TOG. eg 4 Foundries who made agriculture implements and amazing Gawler Iron Lacework seen on many homes.

How TOG and NTSAG currently work together

- TOG assist with sourcing grant funding in past
- TOG VIC refers visitors to the Museum, while the Committee keep the TOG VIC update with brochures.

4.8 The Gawler History Team

The Gawler History Team is a volunteer-based organisation with aim of sharing the unique history of Gawler. The Team has captured and digitised photographs of Gawler’s places, sites, people, organisations, groups, events and things, in addition to researching and creating content for each photograph.

The Team is very active, with approximately 130 members, and 35 – 80 members in attendance at their monthly meetings. The organisation is funded by 14 sponsors each year, to maintain their current operations (Insurance, Website Management, Content + Cameras).

The rich collection of Gawler’s digitised stories are available on www.gawlerhistory.com, which was first launched in May 2012, and is an incredibly important resource for Gawler’s heritage. The website has over 21,000 historic photos, including 880 historic homes. The Team’s Facebook Page also receives very good engagement on shared historic photo posts, and acts as a great ambassador for the Town.

Opportunities exist to work with the team on heritage interpretation and storytelling around the Town, either by public or private enterprises. The Team’s work is also a great drawcard for people travelling for family history research in Gawler.

Key Projects relevant to TOG Visitor Economy

- Scanning and curation of historic Gawler photos
- Research and storytelling of key historic people and places around Gawler
- Mapping of Gawler’s Cemetery interments (Pioneer Park, Anglican Cemetery and Willaston Cemetery)
- Management of www.gawlerhistory.com
- Sharing of old photos and stories on https://www.facebook.com/gawlerhistoryteam/
How TOG and GHT currently work together

- GHT has approached TOG regarding the possibility of affixing QR code stickers to significant Council historic buildings. Council Staff are investigating options in this regard.

4.9 Barossa, Light + Gawler Regional Heritage Network

The Barossa Light and Gawler Regional Heritage Network is a group of representatives from the many heritage organisations located in the Barossa, Light and Gawler Council areas. The committee aims to ensure the rich heritage of the region is preserved, promoted and accessible coming together for the purposes of sharing ideas, resources and knowledge to further this cause.

The group formed to facilitate the establishment of the Barossa, Light + Gawler Regional Heritage Strategy and achieve the objectives contained by working proactively and collaboratively with each other and partner wherever possible with government, business and state and national heritage agencies and educational organisations. The Cultural Heritage Centre Coordinator attends Barossa, Light and Gawler Heritage Committee meetings and has a key role in activating heritage stories in TOG.

4.10 South Australian Tourism Commission

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 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 Tourism Plan 2020
- Foster collaboration among industry, business and Government
- Drive demand for South Australian experiences - Direct to consumer marketing, Public Relations and Famils, and Digital marketing and facilitation
- Support the timely sharing and provision of research and insights that support good decision making by all stakeholders in the industry
- Work closely with aviation partners and other key access and transport stakeholders, such as Cruise Lines, to maintain and grow capacity and ease of access
- Improve understanding of the tourism industry’s contribution to South Australia’s economy

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104 Barossa, Light + Gawler Regional Heritage Strategy (available by request)
• Facilitate cooperative marketing
• Support the industry’s ease of access to external business support programs, grants and other opportunities for industry development and investment
• Work closely with regions, industry associations and partners to grow tourism across the whole State.
• Events South Australia (ESA) is a division of the SATC. It exists to promote South Australia as a tourism destination and attract visitors to the State through securing, managing, developing and supporting leisure events and festivals and providing leadership to the events and festivals industry.

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of $12.8b and 16,000 jobs by 2030. TOG do not currently work with SATC on any projects.

5. TOURISM ASSETS

The TOG has a developing base of tourism assets, with history and heritage its key visitor experience.

TOG is South Australia’s first country town and the largest and most significant historic town. Gawler has a long and rich heritage beginning with the Kaurna people, who are recognised as the Town’s original inhabitants. Following European Settlement, the TOG became South Australia’s first regional settlement, and over the last 180 years has had a rich history of commerce and trade in its many historic buildings. Gawler and Adelaide are the only two South Australian settlements that were surveyed by Colonel William Light. Visitors can engage with heritage around town via walking and driving trails, interpretive signs, the main street, parks, churches and cemeteries.

In addition to the strong history and heritage, the Town’s unique strength is its natural environ located on the three rivers – the North and South Para Rivers and the Gawler River. This river setting offers many parks and a network of shared use cycle and walking trails, which feed into the longer distance cycle trails from Adelaide (Stuart O’Grady Bikeway) and to the Barossa (Barossa Trail).

5.1 Experience Themes + Product Alignment

After undertaking extensive stakeholder consultation and review of relevant strategic documents (see acknowledgements), it has been determined that the TOG tourism experiences can be categorised into five themes:

- Outdoor + Adventure
- History + Heritage
- Food + Dining
- Events
- Arts, Culture + Retail

These experiences appeal to a variety of customer groups, have been categorised (below) by their strengths and ability to grow the visitor experience in the region, and used as a lens to prioritise investment and activities in the region.

- **Primary Strengths** refer to key visitor experiences in the Town and are considered to be the Town’s competitive advantages. Primary strengths include draw-card attractions and activities.
- **Supporting strengths** refer to tourism experiences that won’t attract visitors on their own, however provide an important supporting role in a visitor’s overall experience in the Town.
<table>
<thead>
<tr>
<th>EXPERIENCE THEME</th>
<th>STRENGTH CATEGORY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>History + Heritage</strong></td>
<td>Primary</td>
</tr>
<tr>
<td>History is all around you in the Town. The Town’s traditional custodians, the Kaurna People’s stories can be found around the natural environments, while early settler, colonial and manufacturing history can be experienced via heritage walks and drives, the traditional ‘main street’, museum, churches and cemeteries.</td>
<td></td>
</tr>
<tr>
<td><strong>Arts and Culture</strong></td>
<td>Primary</td>
</tr>
<tr>
<td>The town is home to many public works of art, local artists, workshops and exhibitions. Aboriginal culture can be experienced via Red Centre Enterprises activities and events.</td>
<td></td>
</tr>
<tr>
<td><strong>Outdoor + Adventure</strong></td>
<td>Primary</td>
</tr>
<tr>
<td>Whether it is on bike, foot, air, in parks or reserves, there is an adventure or waiting for all ages, and levels of excitement and ability.</td>
<td></td>
</tr>
<tr>
<td><strong>Food, Dining + Retail</strong></td>
<td>Supporting</td>
</tr>
<tr>
<td>Home to classic country town Pubs and Beer Gardens, Bakeries and Cafes that offer variety of choice for visitors in town, while the Town has a growing range of unique retail outlets for visitors to explore.</td>
<td></td>
</tr>
<tr>
<td><strong>Events</strong></td>
<td>Supporting</td>
</tr>
<tr>
<td>Major community events draw people to the town at certain times of year for different interest areas, while smaller community and local sporting groups fill the gaps in the calendar, making the town a vibrant place to live, work and play.</td>
<td></td>
</tr>
</tbody>
</table>
The following is a snapshot of the experience themes and related product within the council boundaries.

### Table 3 - Experience Themes + Product Alignment

<table>
<thead>
<tr>
<th>EXPERIENCE THEME</th>
<th>TOURISM PRODUCTS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>History + Heritage</strong></td>
<td>History is all around you in the Town. The Town’s Traditional Custodians, the Kaurna People’s stories can be found around the natural environments, while early settler and colonial history can be experienced via heritage walks and drives, it’s traditional ‘main street’, museums, churches and cemeteries.</td>
</tr>
</tbody>
</table>
|                    | • Gawler Heritage Collection  
|                    | • Cultural Heritage Centre – Research Centre and Exhibition (Early Gawler + Aboriginal Exhibition currently on mid 2019)  
|                    | • Old Telegraph Station Museum  
|                    | • Heritage Trails - Historic Main Street Walking Tour, Church Hill State Heritage Walking Trail, EH Coombe Walking Tour, Cultural Walk, Town Self Drive Trail  
|                    | • Historic Churches  
|                    | • Cemeteries (Pioneer Park, Anglican, Willaston)  
|                    | • Historic Homes  
|                    | • Pubs + Parks (eg Deadman’s Pass, Pioneer Park)  
|                    | • Aboriginal Sites around Gawler’s 3 Rivers |
| **Arts + Culture** | The town is home to many public works of art, local artists, workshops and exhibitions. Aboriginal culture can be experience via Red Centre Enterprises activities and events. |
|                    | • Gawler Heritage Collection Exhibitions  
|                    | • Artists - Aboriginal Artists, Gawler Arts Society  
|                    | • Aboriginal Culture via Red Centre Enterprises Activities – Café, Workshops, Cooking Classes, Dance Performances and Tours (Bush Tucker Tour mid 2019)  
|                    | • Classes/Workshops  
|                    | • Public Art  
|                    | • SALA Events  
|                    | • Gawler Community Gallery  
|                    | • Gawler Cinema |
| **Outdoor + Adventure** | Whether it is on bike, foot, air, in parks or reserves, there is an adventure or waiting for all ages, and levels of excitement and ability. |
|                    | • Cycle + Walking Trails/Paths - Barossa Trail, Stuart O’Grady Bikeway, Gawler Rivers Path Tapa Pariara  
|                    | • Gawler Bike Hub - Hire/Service/Facilities  
|                    | • BMX Trails around Dead Man’s Pass Reserve  
|                    | • Gawler BMX Club Bike and Pump Track (Elliot Goodger Memorial Park)  
|                    | • Clonlea Park + Skate Park  
|                    | • Clonlea Reserve Dog Park and Fitness Trail  
|                    | • Parks, Reserves, Ovals and Playgrounds  
|                    | • Gawler Aquatic Centre, Starplex, Gawler Sport and Community Centre  
|                    | • Adelaide Soaring Club (just outside council in Light Regional Council)  
|                    | • Little Hills Hobby Farm |
Food, Dining + Retail

The town offers visitors a wide variety of classic country town Pubs, Bakeries, Restaurants and Cafes.

- Pubs - 8 historic pubs around town
- Cafes + Restaurants - Main Street and around town
- Niina Marni Café
- Retail/Niche Interest - Vadoulis Garden Centre, Gawler Sweets, Lesley’s Boutique, Wintulichs smallgoods, Gawler South Bakery

Events

Major community events draw people to the town at certain times of year, while smaller community, small businesses and local sporting groups fill the gaps in the calendar, making the region a vibrant place to live, work and play.

- Country Music Festival
- Gawler Show
- Gawler Fringe
- Gawler Village Fair
- Gawler Carols
- SA History Week Event Tours
- Sporting Events - Gawler Wheelers, Gawler BMX Club, Skate Park Event + Competition, Adelaide Soaring Club.
- Horse Racing (Gawler + Barossa Jockey Club)
- Greyhound racing (Gawler Greyhound Racing Club)
- Harness Racing (Gawler Harness Racing Club, just outside council in Light Regional Council)
- Food Producers - Food Forest (Open Days/Workshops)
- Gawler Swap Meet
- Weekly markets held at various locations
- ‘Park Run’ Events (100 pax per week)

5.2 Accommodation

TOG offers a limited range of smaller scale accommodation including bed and breakfasts, self-contained holiday homes and caravan/cabin parks. As of March 2019, there were 5 accommodation listings located in Gawler on the Australian Tourism Data Warehouse.

Caravan and campers are catered for in the centre of Town at the Gawler Caravan Park, while the Gawler Gateway Tourist Park is located just south of the Town (toward Munno Para).

Holiday homes and sharing accommodation are a potential growth prospect to expand the accommodation product in TOG, with 24 AirBnB providers and 7 Stayz.com holiday home listings online (March 2019). Other sharing accommodation platforms such as Couchsurfing offered 74 hosts and Home Exchange had a limited number of listings too (March 2019). It was noted by TOG VIC Senior Coordinator they are limited in promoting some of the AirBnB offerings via the Centre due to lack of correct insurances.

The town doesn’t offer any large-scale accommodation, with the closest option being the Novotel Barossa Valley Resort, which is a 20-minute drive east at Rowland Flat (towards Tanunda), and located in Light Regional Council. The Novotel Barossa Valley Resort is located next to the Barossa Trail, offering cycling access south into Gawler.
Anecdotal evidence from the stakeholder engagement workshops highlighted the lack of quality motel style accommodation in Gawler and opportunities to further activate areas in TOG for RV travellers (including main street parking).

Although located outside TOG council boundaries, a new 200–room, multi–star resort hotel is planned to be built at Sandy Creek Golf Club, which less than 15 minutes east from Gawler. The $38 million enhancement to the southern Barossa Valley course, funded by property investment developer Estilo, is hoped to include a wedding chapel, conference rooms, restaurant, bars, pool, fitness centre, mini golf course, and potentially a helipad. A brand-new clubhouse and pro-shop is also planned, with the final product expected to create 220 new jobs.

Table 4 - Accommodation Product in Town of Gawler

| Bed and Breakfasts + Self Contained Accommodation | Church Hill Mews  
|                                                | Eagle Foundry Bed and Breakfast  
|                                                | Quilters Studio  
|                                                | Rivergum Cottages  
|                                                | The Church Gawler  
|                                                | Nana’s Bed and Breakfast Gawler |

| Caravan Parks, Camping + RV Dump Points | Gawler Caravan Park  
|                                       | Gawler Gateway Tourist Park |
5.3 Events

Festivals and Events are important economic and community development drivers in the Town, as they provide an opportunity to attract and engage visitors and the community in many diverse interest areas. The Town has a strong and proud history of hosting events, and today enjoys both a range of long established and newer events (refer Table 3 for full list of events).

5.3.1 Major Tourism Events

**SANTOS Tour Down Under**

In late 2018, TOG Elected Members voted against submitting an expression of interest to host a start or finish of the 2020 Tour Down Under due to the financial costs involved\(^{106}\). TOG has previously hosted TDU starts in 2002 and 2010, and had the ride pass through the town in 2011. With costs of up to $25,000 required to host a stage of the TDU, in addition to other fees of facilitating the event, it would be debatable if TOG would see a positive ROI on the event for a single day event. Community and local media feedback were mixed on the decision\(^{107}\).

With limited council resources, and other lower cost, higher return opportunities found (refer Section 3) to activate the visitor economy and cycle tourism, this was the right decision at the time. However, once the Tourism Plan has been endorsed and activated, TOG can be review future TDU hosting opportunities again in context of other cycle and visitor economy priorities.

**Cycling SA Events**

The TOG are currently in discussions with Cycling SA with regard to future opportunities for Gawler to host a Professional Series Event.

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\(^{106}\) The Bunyip, 3 January 2019, Page 12

\(^{107}\) The Bunyip, 3 January 2019, Page 8
5.3.2 Event Venues

TOG is home to various recreational, sport and community event facilities which could be further activated to support local community or niche interest events.

Table 5 - Sport + Community Event Venues

| Recreational, Sport + Community Event Venues | • Gawler BMX Club Bike Track (BMX events)  
|                                             | • Gawler Skate Park (Clonlea Park)  
|                                             | • Sporting Complexes (Gawler Aquatic Centre, Starplex, Gawler Sport and Community Centre)  
|                                             | • Gawler Civic Centre  
|                                             | • Walker Place, Gawler Main Street Precinct  
|                                             | • Greyhound Racing (Nixon’s Function Centre)  
|                                             | • Function centres at various hotels  
|                                             | • Gawler + Barossa Jockey Club (The Terrace Function Centre)  
|                                             | • Park + Playgrounds (Key parks include Apex, Clonlea, Pioneer, Dead Man’s Pass, Lime Kiln, new playgrounds in development)  
|                                             | • Sports Ovals + Pitches (Gawler, Princes, Elliott Goodger, Willaston, South Gawler, Karbeethan Reserve)  
|                                             | • Community Halls |
5.4 Community Tourism Assets

Several key visitor experiences in the town are located on property owned by TOG, which are then operated and marketed by:

- TOG / TOG VIC;
- Private leases, or;
- Volunteer based Management Committees.

5.4.1 Gawler Civic Centre

The Gawler Civic Centre is an iconic, community hub leading the renaissance of Gawler by connecting people and businesses through increased commercial activity, community events and interaction.

Officially opened on Sunday 7 April 2019, the primary purpose of the Gawler Civic Centre is to revitalise and redevelop existing Main Street, community buildings that will drive economic growth, create new jobs and strengthen the social and cultural base of Gawler and the broader region. Social connection, community celebration and lifelong learning are key outcomes for this unique, regional facility.

The Gawler Civic Centre contains six business functions that intend to collectively deliver significant community and economic development in the region. Collaboratively these offerings will enable the Centre to once again be the service centre for the broader Gawler region.

Gawler Cultural Heritage Centre

The Gawler Cultural Heritage Centre comprises of three parts:

- Research Centre
- Heritage Gallery
- Historic Reading Room

The Research Centre is home to the Gawler Heritage Collection; which comprises of three unique collections:

- The Gawler Institute Archives Collection - which consists of the administrative records of the former Gawler Institute.
- The Gawler Local History Collection – is primarily focussed on printed, published an paper based material specifically relating to the history of Gawler and the local region.
- The Gawler Civic Collection - which comprises of Items given to or purchased by the TOG by virtue of its Civic role.

While these collections are primarily paper-based (including photographic records), there are also many historical objects such as portraits, paintings, maps, plans and textiles.

Additionally, the Centre also offers an Ancestry Library Edition which provides access to a wide range of unique resources for genealogical and historical research.

The Heritage Gallery is a space to display culturally relevant exhibitions for community and visitors to the Town.
*Into the Light: Exploring Gawler’s Rich Cultural Heritage* is the first exhibition in the new Heritage Gallery, which will be showcased through till 2020. The exhibition celebrates the history of Gawler and the stories associated with the unique and precious Gawler Institute Collection, interweaving Kaurna and European history and culture. This exhibition explores the theme of *Into the Light* revealing Colonel Light’s role in Gawler’s history, the complex process of European colonisation and the role of the Gawler Institute in shaping South Australian history.

The Centre also plans to host school groups to educate on local history (as part of curriculum), leveraging all historical assets, in addition to drawing on the knowledge base of current staff.

**Niina Marni – Social Enterprise Café**

The Gawler Civic Centre is home to Niina Marni, a Social Enterprise Café, which is owned and operated by Red Centre Enterprises. The Café is located on the ground floor of the Centre and is open to the public 6 days a week (closed Sundays) and also caters for groups using the Function and Meeting Rooms in the Centre. The Café is South Australia’s only 100% owned Aboriginal Café, and also serves 100% aboriginal food.

In additional to the Café’s dining experience, it adds a very important depth to the cultural experience theme within the TOG, offering visitors the opportunities to engage and learn about aboriginal culture through their workshops, tours, cultural performances and storytelling.

**Gawler Public Library**

The Gawler Public Library provides a welcoming and inclusive library service to the Community. The library offers a complete library service, with an extensive offline and online catalogue, in addition to book clubs, home visiting service, and access to public computers, WiFi and printing services. The library also hosts a range of events and programs throughout the year. They include creative, cultural, informative and educational activities for all ages.

**Business Innovation Hub**

The Business Innovation Hub is located on Level One of the Gawler Civic Centre, and is a commercially-focused, flexible working space. The Hub will be one of 15 new GigCity Adelaide Precincts. GigCity Adelaide is providing fast and affordable gigabit internet connection speeds (100 times faster than the national average) for start-ups, entrepreneurs and big businesses. GigCity is making Adelaide one of the most connected cities in the Southern Hemisphere. The use of GigCity Adelaide will transform the TOG as an early adopter of technologies driving innovation and growth. This connectivity, coupled with the digital advisors in residence programs and business mentoring, networking and education, provides a great opportunity for local and regional entrepreneurs and start-ups to compete in the local, national and global digital economy.

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* Consultation with Jacinta Weiss, Heritage Centre Coordinator, TOG, July 2019
Youth Space

There is a dedicated space within the new Civic Centre to support the engagement of the community’s Youth, through various programs and activities as outlined in their Youth Development Plan and implemented by their Youth Development Coordinator.

Function Venues + Meeting Rooms

The Gawler Civic Centre’s meetings and events spaces are featured in the iconic and culturally significant State Heritage listed Institute and Town Hall buildings. The Institute event spaces and Town Hall meeting rooms are equipped with state-of-the-art audio visual technology, high-speed Wi-Fi and are flexible spaces that can be setup in a variety of formats. Red Centre Enterprises offer a range of flexible catering options for the function spaces.

The Institute is suitable for all types of corporate, social and community functions, including conferences, expos, seminars, gala balls, wedding receptions, quiz nights, presentations, cabaret performances, birthday parties and more. The Institute has a total capacity to seat 250 in an historic and stunning venue. The refurbished Town Hall provides a range of private meeting and smaller workshop spaces, which support community and corporate meetings and workshops.

5.4.2 The Gawler Community Gallery

The Gawler Community Gallery is volunteer run, not for profit, membership-based organisation, located in the heritage-listed Station Masters house at the Gawler Railway Station. Open Saturdays and Sundays, the Gallery has various exhibition spaces features changing exhibitions every 6 weeks of local Artists, Art Groups and touring Exhibitions.

5.4.3 Gawler National Trust ‘Old Telegraph Station’ Museum

The Gawler National Trust Museum is located in Gawler’s main street (Murray Street) and is a key visitor experience in TOG. It was built in 1860 of local stone as a telegraph station, designed by the Colonial Architect. The museum is owned by the National Trust SA and managed by the NTSA Gawler Branch. The volunteer committee open the museum Tuesday to Friday, 1pm to 4pm, or by appointment. As well as keeping the museum open, activities include: school and group tours by arrangement, history walking tours by arrangement (see section 2.2.7 for further details).

5.4.4 Parks, Reserves + Rivers

There are many parks, gardens and reserves that provide a range of activities for the local community and visitors. Following is an overview of the key Parks and Reserves utilised by visitors.
Pioneer Park

The Park overlooks Gawler Main Street, is used as a venue for many community and tourism events and is co-located with the Gawler Visitor Centre and Bike Hub. The Park has a rich history, being the site of Gawler’s first cemetery, with 471 people, including a large number of them children interred there. The land was used for burials until 1870 when the cemetery was officially closed. The site was designated as parkland in the 1930s and redeveloped as such thereafter to its current state.

Gawler, North Para and South Para River

Gawler is positioned at the junction where the South Para and North Para rivers join to form the Gawler River. The rivers were the focus for Gawler’s original settlement, a source of its economic growth in its early years and today still shape how the town functions.

The rivers have been an important source of recreation for locals. From swimming, picnicking, bush walking and for a short period the South Para was dammed for boating. There have been a series of parks and reserves developed on the rivers including Clonlea on the North Para, Parridia Taikondi at the junction of the two rivers, Apex Park close to the centre of town, and Dead Man’s Pass on the South Para.

In October 2011 these reserves were linked together with the official opening of Gawler Rivers Path - Tapa Pariara. As noted above, this path provides a safe and accessible surface for everyone to enjoy the rivers. Their beauty, the many patches of remnant vegetation, and the wildlife.

Clonlea Reserve

Clonlea Reserve is located on the banks of the North Para River at Willaston and is a major recreation area with residents with its Dog Park, Fitness Trail, Skate Park, Tennis Courts and Playground. It also includes a section of the Gawler River walking and cycling shared path and is home to the Gawler Park Run course. Toilets, barbeques, and parking facilities adjacent cater for recreational activities and events. Free WIFI is also rolling out mid 2019.

Deadman’s Pass

Deadman’s Pass Reserve is a park located in the centre of Town and is a well utilised park for local families and visitors. It includes sections of the Gawler River shared walking and cycling path, picnic facilities and public toilet facilities. It is also anecdotally used by local MTB community for down-hill riding.

Apex Park

Recently upgraded, Apex park is positioned on the South Para River, a block away from the Main Street. Shaded by big trees, the park offers gym and play equipment, and toilet, seating and BBQ facilities, interpretive signage and is part of the Gawler Rivers Path.

Karbeethan Reserve

Karbeethan Reserve, a 9.96ha sporting precinct located in Evanston Gardens provides:
• sporting infrastructure including; a baseball diamond, a soccer pitch, three additional turfed areas that are utilised for multiple sports, a small clubroom and changing facility;
• a home ground for a number of local sporting clubs and associations; and
• open space for community use.

In February 2018, Council engaged consultants JPE, collaborating with InsideEdge, to undertake the development of a Master Plan for the reserve. The purpose of the Master Plan is to provide TOG with a coordinated and strategic planning approach to allow for the effective and efficient provision, management and development of sport and recreational facilities at the site.

The Master Plan went out for public consultation in early 2019, with the results to be presented to TOG council for adoption to proceed to the next stage.

5.4.5 Tours + Trails

The Gawler Visitor Information Centre is responsible for the development and distribution of four walking and driving tours of the town. All tours highlight significant historical attractions, buildings and stories. The Gawler Main Street Walking Tour is also provided to visitors as a guided tour (pre-bookings essential).

• Gawler Main Street Walking Tour
• Gawler Church Hill State Walking Tour
• Gawler Driving Tour
• EH Coombe Walking Tour

Additionally, Red Centre Enterprises are currently working with the SATC to launch a new Gawler Bush Tucker Tour in 2019.

5.4.6 Gawler Aquatic Centre

The Gawler Aquatic Centre, located on Victoria Terrace and on the banks of the North Para River, has operated seasonally since its opening in 1961. The facility is currently managed and operated by Council, although it has previously operated with various management arrangements, including a volunteer management committee.

The Centre is an outdoor swimming facility that comprises of three swimming pools; a 50-metre-long seven lane main pool and two smaller pools for learners and toddlers. All three pools are heated and provide a range of activities including lap swimming, learn to swim lessons and aqua fitness programs in addition to general swimming for patrons.

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114 Consultation with Nadia, Red Centre Enterprises, July 2019
Council is about to commence the development of the Essex Park and Gawler Show Grounds Regional Precinct Master Plan which includes consideration of the Aquatic Centre. This Master Plan will provide strategic planning and direction for a highly utilised and significant regional community precinct as is due for completion in mid 2020.

5.5 Placemaking Assets

TOG is also responsible for the planning, design and management of public spaces, of which may impact the visitor’s experiences in the Town. Placemaking capitalises on a community’s assets, inspiration, and potential, with the intention of creating public spaces that promote people’s health, happiness, and well-being.

5.5.1 Murray Street

Gawler’s Historic Main Street, Murray Street, is a key visitor precinct. During the stakeholder consultation, the following challenges and opportunities were identified for Gawler’s Main Street:

- **Streetscaping** - More public art, more street trees, continued restoration of heritage building + interpretation, minimum standard of landlords for non-heritage facades
- **Services** - Free WIFI, clean + easy to find public toilets
- **Parking** - Easy parking (especially for RV visitors).
- **Cycling** - Facilities for cyclist to park/repair bikes/seating/water stations/safer cycling lanes, cycle friendly businesses
- **Dining** - improve the variety and quality of food options, activation of open spaces for dining/entertainment
- **Retail** – more vibrant and unique retail mix
- **Events** – further activation in Main Street eg laneways/night-time economy

TOG’s opening of the Gawler Civic Centre and Public Library in February 2019 is one positive placemaking project for the Main Street not just for local community, but also for visitors to the town.

**Walker Place Redevelopment**

Planning is also underway for the redevelopment of Walker Place into a pedestrian-vehicular shared use plaza space with pop-up event functionality as part of the overall Town Centre Design Framework, with construction being finalised in 2020.

One deliverable of TOG’s Walker Place Redevelopment is a digital wayfinding device (electronic signage) that is proposed for installation at the North Eastern end of Walker Place (Murray Street end). This deliverable has been leveraged within the Smart Cities Funding for the Connected Community Project. Construction on the Walker Place Redevelopment will commence in early 2020.
5.5.2 Train Station Precincts

TOG maintains six train stations within its municipality, Gawler Central, Gawler Oval, Gawler, Evanston, Tambelin and Kudla. TOG play an advocacy/facilitation role in upgrading train station precincts and have highlighted in their 2017 - 2027 Community Plan\textsuperscript{115}:

- 2.4 Manage growth through the real connection of people and places
  - 2.4.5 Encourage proposals for the redevelopment of all train station precincts.

The Gawler Central and Gawler Stations are key visitor touchpoints.

**Gawler Central** is a key arrival point for visitors to TOG at the terminus of the Adelaide to Gawler Rail line. The Station offers direct access to the Gawler River Cycle Path and is walking distance to the Visitor Information Centre and Bike Hub and Main Street.

**Gawler Railway Station** is a visitor precinct in its own right; currently under the custodianship of the Gawler Lions Club. Projects in and around the Station include:

- Restoration of parts of the Gawler Railway Station and beautification of the surrounds, including relocation of a steam locomotive.
- Home of the Lions Club Sunday Farmers Market
- Home of the Gawler Community Gallery (via the Gawler Community Gallery Committee)

5.6 Touring Routes

Touring routes are key experiences that encourage the dispersal and increased spend of visitors around South Australia.

At a state level, the South Australian Tourism Commission has a state-wide tourism strategy promoting key drive routes that link the state’s best tourism experiences (see southaustralia.com\textsuperscript{116}). Of the Touring Routes developed and marketed by the SATC, the *Epicurean Way* and *Explorers Way* traverse through the Barossa tourism region and have the potential to offer visitation growth opportunities for the TOG with enhanced marketing.

**Epicurean Way**

The Epicurean Way\textsuperscript{117} links together the iconic food and wine experiences of McLaren Vale, Adelaide Hills, Barossa and Clare Valley. Whilst this Trail doesn’t traverse the TOG boundaries, it goes through neighbouring townships of Williamstown and Lyndoch, therefore opportunity exists to drive visitation into Gawler via the Barossa Trail.

**Explorer’s Way**

Similarly, the Explorers Way\textsuperscript{118} is a journey through the heart of Australia’s landscapes and outback and extends beyond the South Australian Borders into the Northern Territory’s top end. The Journey starts in Adelaide and navigates its way through Gawler, highlighting the Gawler Visitor Information Centre on the official map. Given that Gawler is highlighted on the map, there is a real opportunity to leverage the marketing efforts, to get visitors to consider staying longer within the TOG.

\textsuperscript{116} Epicurean and Explorer’s Way > http://southaustralia.com/things-to-do/road-trips
\textsuperscript{117} Epicurean Trail > http://southaustralia.com/things-to-do/road-trips/epicurean-way
\textsuperscript{118} Epicurean Trail > http://southaustralia.com/things-to-do/road-trips/explorers-way
6. TOURISM ACCESS

How visitors arrive and travel around the Town is a key driver for growing the visitor economy, improving the visitor experience and growing advocacy for TOG.

Gawler is typically a self-drive destination, but potential exists to improve visitor access infrastructure at a Local Government level, in addition to leveraging key access points to increase visitation to the region.

6.1 Road + Cycle Infrastructure

Roads and Shared Paths are the key connectors that allow visitors to explore the Town and surrounding regions, connect tourism attractions and towns and allow visitors to safely travel around the town, via car and bicycle.

TOG’s Asset Management Plan (AMP) is prepared under the guidance of Council’s Vision, Mission, Goals and Objectives, whilst taking into consideration requirements outlined by Legislative requirements, and community expectations. The AMP outlines service levels and strategies for all transport related upgrades.\(^{119}\)

**Roads**

Road upgrade and renewal funding opportunities exist outside of the allocation given by the *Roads to Recovery Program*\(^{120}\) which is used to support the AMP. Specifically, the competitive *Special Local Roads Program (SLRP)*\(^{121}\) grant program, is the most relevant for tourist roads as ‘Tourism’ is highlighted as one of the 3 main criteria assessed in the application and evaluation process. A regional technical group assesses annual applications to recommend priorities for an advisory panel to recommend for funding by the Minister for Transport.

Consultation with the local tourism industry highlighted frustration with the condition of some of the bridging of sealed roads leading into Gawler, citing safety as the main concern. Also, the Gawler By-Pass has been noted as a challenge, given that tourists have to turn off the highway to the Barossa to go into the town.

In terms of opportunities outside of the region, the opening of the Northern Connector road infrastructure project, which is due for completion late 2019, will improve road access to the Region from the City and particularly the Port, with proposed improvements to travel time.\(^{122}\)

**Cycle**

Cycle tourism offers a significant growth opportunity for the Town for improving and further connecting TOG visitor experiences. Gawler is well-placed to capitalise on both recent and planned major walking and cycling projects across the broader region.

**Current**

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Bicycle Hub at the Gawler Visitor Information Centre

The TOG has recently completed a Bicycle Hub (GBH) at the Gawler Visitor Information Centre, Pioneer Park. The Hub provides maps, information, bicycle hire, repair stations and showers. This helps position Gawler as an ideal stopover, hub or resting point for bikeway users seeking shopping, meals, accommodation and other activities.

An electric charging station also supports the growing popularity of electric vehicles (strong uptake by cyclists) and can also be utilised by people who use mobility scooters. Bicycle hire is available Monday to Friday 9am-5pm, Saturday 10am-4pm, Sundays and Public Holidays 10am-2pm. Bikes can be returned out of hours with the free hire of bike lockers (conditions apply).

Some of the challenges for this asset include:

- Lack of awareness of facility by local residents and visitors
- Very small uptake of bike hire facilities (reported only 1 – 2 per month)
- No official visitor usage data collected
- Lack food and dining activation at the Hub (give people reason to visit)
- Lack of off-road connectivity to all of TOG cycle paths
- Lack of effective marketing to promote the services

The Barossa Trail

The Barossa Trail (formerly Jack Bobridge Track) (BT) involves 40km of shared path, connecting Angaston to East Gawler through a number of Barossa townships and wineries. Currently the shared path network terminates 1.3km short of Council’s eastern boundary near Sunnydale Drive. Connections to the Gawler Town Centre are currently on-road along either Calton Road or Barossa Valley Way/Lyndoch Road (two high volume roadways without cycling infrastructure) to access the town centre.

Concordia Land Management have proposed an off-road route shared path extension within its future development. Although this section of the Bikeway does not fall within the TOG boundaries, it will ultimately link the Gawler Township to the Barossa via an off-road path, which will help further activate the trail for cyclists who prefer an off-road cycling experience.

The date for construction is not known, however it is recommended that the TOG liaise with the Barossa Council and Concordia Land Management to ensure that it links into the Gawler Walking and Cycling Network and provides connections from the existing JBT.

Some of the challenges for this asset include:

- Currently 1.3km of on-road cycling for visitors between Gawler Bike Hub and start of JBT
- Long, uphill ride for less confident or fit cyclist until they get to first experiences on the Track, which is a 15km uphill ride to Lyndoch
- Track requires ongoing maintenance, and potentially widening (to maintain national standard)
- Funding for last 1.3km off-road path construction
- Confirmed support of Concordia Land Management and Barossa Council off-road connection route.
- No dedicated marketing (to promote and set visitor expectations for the track)
The Stuart O’Grady Bikeway

The Stuart O’Grady Bikeway (SOB) is a 23km shared path following the eastern boundary of the Northern Expressway. The bikeway currently extends from the corner of Two Wells Road and Weaver Road, just outside of the Town of Gawler, to the junction of the Northern Expressway and Port Wakefield Road. The proposed extension of the bikeway as part of the DPTI Northern Connector construction will see the shared path extend 16km to the Salisbury Highway Junction.

Some of the challenges for this asset include:

- No continuous off-road cycle connection from the Gawler Bike Hub. Visitors need to use on-road cycling from GBH to Gawler Rivers Path, and then more on-road cycling to start of SOB at the Northern Express Way. Feedback from TOG VIC is it can be hard to follow and has to be manually marked on current visitor maps.
- Lack of visitor experience on the trail. It’s straight, flat, not much to see and currently ends abruptly on a major highway. In saying this, future extension along the Northern Connector to Port Adelaide and plans to connect Semaphore and the Coastal Way will refocus the value and attraction of this link as a ‘journey’ from Adelaide’s Coast to the Barossa which will have appeal for the touring market.123
- No dedicated marketing (to promote and set visitor expectations for the track)

Gawler Rivers Path (Tapa Pariara)

This scenic shared use cycle and walking trail traverses Gawler following the North and South Para Rivers. It continues north across the NorthPara River into Hewett, which is located in Light Regional Council. The path links key Gawler visitor and community assets of Gawler Caravan Park, Gawler Central and Gawler Oval Train Stations, Clonlea Park, Gawler Aquatic Centre, Gawler Oval and Dead Man’s Pass. Interpretive signs tell the aboriginal and early settlement history of the town in certain areas of the trail.

Some of the challenges for this asset include:

- Lacks food/dining destinations along the path
- Dated interpretation signage in areas
- No off-road connection to from the Gawler Cycle Hub to join the Path
- No cycle trail (either on or off-road) via Gawler East connecting it back to Gawler Cycle Hub
- No dedicated marketing (to promote and set visitor expectations for the track)

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123 Consultation with Craig Grocke – RDA BGLAP, July 2019
Proposed/Potential Infrastructure

The Gawler Greenway

The Gawler Greenway is a long-term vision by the State Government for a cycling route and improved access to public transport extending from the Adelaide CBD to Gawler. The alignment typically follows the Gawler railway line. The route is substantially completed between Regency Road and the Adelaide Parklands (to North Adelaide Station) and connects to the Adelaide Railway Station via bike lanes on War Memorial Drive.

When completed, the Greenway will link into several key cycling routes including the Dry Creek Trail, Little Para River Trail, Barossa Trail and the Stuart O’Grady Bikeway. Works to complete the remaining sections of the Greenway are not currently planned by DPTI. However, the proposed route forms part of the Gawler Walking and Cycling Network and Council can commence sections as required.

Mountain Biking Trails

TOG has unofficial Mountain Biking tracks around Dead Man’s Pass, Clonlea Reserve and un-developed land around the town. This was identified via local mountain biking enthusiasts via the Stakeholder Engagement.

There is also a long-term opportunity to consider how an off-road path for walking and cycling links Dead Man’s Pass to Parra Wirra Recreation Park and the reservoirs via the South Para River link.124

Mountain biking is a significant growth area in Cycling, and TOG has the opportunity to tap into the growth of this cycling segment via the activation of environmentally sensitive mountain biking trails around TOG existing assets through the passionate local mountain biking community.

Adelaide Wine Capital Cycle Trail

This proposed cycle trail will connect the McLaren Vale, Adelaide Hills, Barossa and Clare Valley food, wine and tourism regions by bike. It is currently in planning and development stage with various stakeholders at state, local government and industry body levels.

The development of the project will likely see links to surrounding networks including Gawler. To formally become part of the project capital bid and business case development involves a financial contribution to the project as per other participants and agreement of current MOU signatories. The project will build the profile of cycle tourism around peri-urban Adelaide that will benefit TOG regardless of their level of involvement. This project is work in progress and

124 Consultation with Craig Grocke – RDA BGLAP, July 2019
doesn’t exclude Gawler from the benefits it hopes to capture. The project now includes the City of Onkaparinga and McLaren Vale linking all major wine regions close to Adelaide.125

The Trail offers a significant longer-term opportunity for TOG to tap into the higher yielding, international food and wine cycling enthusiasts.

Figure 18 - Adelaide Wine Capitals Cycle Trail Network Map

TOG is included on the Trail via the SOB out of Adelaide and connection through to the Barossa via the JBT. The activation of the wider visitor experience in Gawler, as well as the off-road infrastructure connections of the SOB and JBT, as per this new plan, will help position TOG to take full advantage of the new trail if and when it is completed.

TOG is currently represented in the project by RDA Barossa. It’s recommended TOG work in close consultation with RDA Barossa to support the project and infrastructure activation as required.

125 Consultation with Craig Grocke – RDA BGLAP, July 2019
6.2 Adelaide Airport

The SATC works closely with domestic and international airline partners and the Adelaide Airport to attract new airlines and grow seat capacity of existing airlines, making it easier for visitors to get to the State. Increasing direct air access to Adelaide is key to attracting increased visitor numbers to regional South Australia, as nearly half of all visitors to South Australia visit regions. Key opportunity for TOG to leverage growth of visitors through Adelaide Airport is to keep lines of communication open between SATC via Tourism Barossa around relevant aviation related projects.

6.3 Tour Operators + Bike Hire

The TOG region is serviced by many tour operators whom service the region, either based in the Barossa or based in Adelaide. Barossa Bike Hire are bike hire and cycle tour specialists and has the largest fleet of premium, professionally maintained bikes, including a large number of Bosch E-drive electric bikes. Gawler Wheelers, a member-based road cycling group, also facilitates social rides each Saturday for members and non-members. Gawler Passenger Service are a fully licensed operator for more than 30 years offering chauffeured cars and mini buses for tours, airport and concert transfers and other personal transport needs.

Tour operators based in Adelaide heading to Clare Valley, Flinders Ranges and Riverland also traverse the region via several different routes. The Flinders Ranges has the highest number of international visitor nights of all South Australian Regions and therefore presents an opportunity for TOG to capitalise on this market as they traverse the region.

6.4 Public Transport

Gawler Taxis are the local taxi service within the town and are open 7 days a week. They also provide transport to and from Adelaide and Adelaide Airport. Additionally, the Town is serviced by Suburban Taxis and Uber. Gawler Car and Truck rentals also offer car hire services for people requiring car hire in the Town (not available at Adelaide Airport).

The Adelaide Metro public transport system supports bus and rail services to and throughout TOG. TOG is home to six Gawler train stations, Kudla, Tambelin, Evanston, Gawler (centre of the Town), Gawler Oval, and Gawler Central Gawler.

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130 Uber > https://www.uber.com/en-AU/cities/adelaide
131 Gawler Car Rentals > http://gawlercarrentals.com/
CBD, 2-minute bike ride to TOG VIC) every half an hour from Monday-Friday from 5am-1130pm, and between 6am-11:30pm Saturday, Sunday and Public Holidays.132

Passengers can carry bikes on trains for free on trains Monday to Friday between 9.01am and 3pm or between 6pm and the last service when space is available. Bikes can be carried Free Saturday, Sunday & public holidays all day when space is available. At all other times a peak concession fare must be purchased for bikes.133

The electrification of the Gawler Rail Line is currently underway, and is due for completion in later 2020. The completion of the electrification will provide increased frequency of services and improved customer experience for train users134. Adelaide Metro also service Gawler via several circuit loops throughout the town, but there is no bus that takes passengers from the City of Adelaide to TOG directly during daylight hours (there is a ‘After Midnight Service’135).

Premier Stateliner passenger transport services the TOG on their ‘Riverland’ round trip service departing from the Adelaide Central Bus Station. The coach stops at the Gawler Visitor Information Centre four times a day – 2 services in each direction.136 Similarly, YP Coaches services the TOG, departing from the Adelaide Central Bus Station and stopping at the Gawler Visitor Information Centre three times during weekdays, and twice over the weekend on their timetable to and from the ‘Mid North’.137

Interstate trains The Overland, The Ghan, The Indian Pacific and The Southern Spirit, operated by Great Southern Rail, arrive and depart from the Adelaide Parklands Terminal located three kilometres from the city centre.

All guests on the Indian Pacific Sydney to Perth route have a Barossa Valley or Hahndorf excursion built into the experience, which is therefore presents the opportunity for TOG to work in partnership with key tourism stakeholders to increase regional product in excursion itineraries.138

7. TOURISM INFRASTRUCTURE

TOG is responsible for delivery and maintenance of infrastructure in the Town which supports the activation of both the visitor economy.

7.1 Signage

TOG are currently planning for the roll out of Digital Wayfinding signage as part of the Redevelopment of Walker Place. Specific locations for the devices are yet to be decided by Council. This project is set to be implemented in the last half of the 2019 calendar year.

During stakeholder consultation, signage was indicated as a challenge by many stakeholders.

Tourism signs around TOG are as follows:

- Interpretive Signs – Deliver interpretation of key visitor assets in locations, such as River Trails and Parks
- Tourism Signs (brown signs) – Directs visitors to a specific Tourism Businesses
- Tourism Trail Signs – Directs visitors around a drive trail, such as the Gawler Heritage Trail
- Wayfinding Signs – to public toilets, to/from/along cycle paths, parks etc.
- Gawler Bypass Exit Signage/Lyndoch Road – Signs that provide a list of Tourism Experiences at each entry to town.

7.2 Public Amenities

Council is responsible for the provision and maintenance of public toilets in the Town, including RV Dumps for self-contained motorhome travellers, which are important services for visitors to the Town. During the stakeholder engagement, the following public amenities opportunities were identified:

- Public Toilets - Stakeholders identified the importance of council providing public toilet access on cycle paths, clear wayfinding signage to public toilets and, maintaining them to a very clean standard and a working order.
- RV Dump Point. The only RV Dump Points in TOG are at the Gawler Caravan Park and Gawler Gateway Tourist Park, for which can be used for a small fee of $5. Council has recently undertaken a review of RV Dump Points and looked at the option to offer an additional RV Dump and Overnight Camping area in another location of town. However elected members voted not to pursue this opportunity at this time.
7.3 Connected Communities – Free WiFi

Free WiFi is a positive visitor service that can support the advocacy of experiences and towns by visitors.

TOG’s ‘Connected Community’ platform offers a WiFi solution that provides a captive portal to customers (locals and visitors) of the site. The captive portal captures registration information and lands the customer on a splash page or website. This site can be a basic page of information or it can provide interactive elements, community messaging, advertising and local business offers. The WiFi solution manages the customer’s session information and will provide analytics against the session. Browsing information, return visits and other business related analytical information is provided on the management dashboard.

Council has invested in Wi-Fi access points throughout Murray Street and surrounding precincts including Gawler Central Station, Clonlea Reserve (Skate Park) and Apex Park. With the implementation of community safety upgrades funded by the Australian Government’s Safer Communities Program, this network will be expanding to incorporate Pioneer Park and Clonlea Reserve (Dog Park). The TOG VIC currently provides free WiFi.

7.4 Information Bays

Information bays provide a welcome point to TOG, provide some local historical interpretation and deliver offline visitor servicing to people travelling into the Town. TOG currently outsources Information Bays to Civic Guides which are updated by TOG VIC every 2 – 3 years.

7.5 Parking

Car, RV, caravan and bicycle parking options throughout the TOG were a common challenge during stakeholder consultation, particularly in the CBD.

In 2017, TOG undertook a study to review the current car parking provision within Gawler Town Centre. A number of recommendations have been made from the study covering the car parking fund, parking management, signage and wayfinding, pedestrian access and amenity and wider travel access to the town centre.\(^{139}\)

TOG is in the process of improving car parking arrangements to provide additional RV parks along Main North Road (adjacent from the Gawler Caravan Park) and at the TOG VIC carpark.

Bicycle parking at key locations on cycle paths to allow secure and safe parking of cyclist bikes was a concern.

8. TOURISM RESOURCES

The TOG currently invests heavily in the Visitor Economy, with approximately $200,000 per annum allocated to operating the TOG Visitor Centre, in addition to staffing costs across roles in the newly refurbished Civic Centre and other internal project resources.

Currently, visitor economy projects are supported across a number staff, elected members and departments in Council. Following is an outline of key staff, services and roles as it relates to implementation of the visitor economy related projects and services.

8.1 Business Enterprises and Communications

This department oversee a number of areas that relate to the visitor economy, including

- Manager oversees the strategic delivery of projects and sub departments, and manages agreements with Business Innovation Hub and Social Inclusion café operators.
- Civic Centre operations Coordinator is responsible for the day-to-day management of the Gawler Civic Centre, including venue hire.
- Economic Development sits within this group, and manages the agreements/funding of Gawler Business Development Group and RDA Barossa Gawler Light Adelaide Plains.
- Special Projects Officer is responsible for key projects that sit across areas including the visitor economy, and the development of the Tourism Plan 2019-2024.
- Senior Visitor Information Centre Officer is responsible for management and operators of the TOG VIC, as well as all Tourism related marketing activities.
- Cultural Heritage Centre Coordinator is tasked with the management of the Cultural Heritage Centre (major TOG tourism asset) which is also earmarked to extend to develop and support heritage experiences across the TOG. This role also attends the Barossa, Light and Gawler Heritage Committee Meetings.
- Coordinator, Marketing and Communications is responsible for council wide communication, branding, graphic design and marketing activities (outside of Visitor Centre marketing activities).

8.2 Infrastructure and Engineering Servicing

- Manager is responsible for key infrastructure and engineering projects across council, including the implementation of the Gawler Cycling and Walking Plan 2018 - 2028. Many actions within the Tourism Plan will support the Cycling and Walking Plan.
- Team Leader, Asset Planning also supports the implementation of the TOG Cycling and Walking Plan 2018 - 2028
9. **BRANDING**

A destination’s brand is its reputation. A brand is the culmination of the stories that people share about the destination, the experiences someone has in a region, rather than what the destination says about itself. Therefore, it is important the industry activates consistent branding through storytelling and product experience delivery, to ensure it encourages positive advocacy.

9.1 **Strategy**

There is currently no brand strategy to articulate the TOG’s brand values and proposition for various economic markets including the visitor economy.

9.2 **Logo / Brand Identity**

The TOG recently reviewed and redeveloped a brand identity for the Town, with implementation details outlined in the TOG Brand Standards Document. The brand standards have been developed to support the application of the logo and to ensure consistency in all areas of use.

This logo is utilised for all corporate and visitor facing signage, collateral and documentation.

All units of Council have the capacity to be branded with the logo. The departments have the option to have the coloured dots in their unit brandmark or have icons relevant to their department.

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140 Town of Gawler Brand Standards Document – Updated July 2018 (available via TDG Marketing Team)
9.3 Barossa Brand

Whilst TOG technically forms part of the South Australian Tourism Commission’s ‘Barossa Tourism Region’, the use of the Barossa Brand (recently redeveloped in 2018) to promote Gawler would not be advisable, as the tourism value proposition for the Barossa is inconsistent with that of the TOG.

9.4 South Australia’s First Country Town

Opportunities exist for the TOG to leverage the fact that Gawler is South Australia’s first country town, and the largest and most significant historic town.
10. MARKETING

Many of the tourism stakeholders of TOG undertake marketing activities for the Town (as outlined in Section 4). However, from a TOG perspective, Senior VIC Officer and the Coordinator, Marketing and Communications initiates and implement most of the marketing and visitor communications for the town.

10.1 Key Marketing Initiatives

10.1.1 Activities managed by TOG VIC

TOG VIC take the lead role in marketing tourism products predominantly in and around Gawler. They currently undertake the following marketing activities.

- **Website:** TOG have visitor information located on the Council Website under “Discover” section, which they are currently expanding to be more customer focused (https://www.gawler.sa.gov.au/discover). No visitor engagement or conversion metrics are being tracked on the websites.

- **Social Media:** TOG have a dedicated Facebook Page for the Visitor Centres (https://www.facebook.com/GawlerVisitorInformationCentre/), which mainly used to share local events and local business updates. Due to lack of resources it is only posted to on a reactive basis, there is no strategic plan or measurement of its activities, it lacks a content calendar or strategic storytelling focus, which is reflective of its very low engagement.

- **Advertising:** Only advertising TOG VIC invests in is the annual Barossa Visitor Guide.

10.1.2 Activities managed by Coordinator, Marketing and Communications

The Coordinator, Marketing and Communications, assists with the following tourism related marketing projects:

- Website updates
- Social Media posts
- Collateral Design Support, Brochures, maps etc.
- Signage
- Special marketing/comms projects (eg. Gawler Branding Project)
10.1.3 Connected Community - Town of Gawler ‘App’

“Connected Community” will see Council partner with a mCommerce specialist company to develop an online platform that can engage Council, local business, community and visitors. This platform will drive and manage Council’s free public WiFi system, be available via the internet and a free “Town of Gawler” App.

The solution within the “Connected Community” project is a cloud based platform that sources open data to create a single view of a customer. This platform has an inbuilt campaign engine that allows Council and partner businesses to create campaigns that are triggered by events taking place; such as the trigger of a beacon (explained below), a customer’s birthday or a special event.

- The platform can send the campaign to multiple customer touch points including mobile application, email and text message. Content is managed within the platform with the user selecting suitable content around the delivery point to the customer.
- The platform allows dynamic follow up. If a customer was sent an in App offer and hasn't responded for a defined period of time, another method will be used to reach the customer, for instance, an email with the offer will then be sent to that customer.
- This type of communication platform can be used by Council for such things as community messaging, payment reminders, community consultation and community program advertising. It can also be used by local businesses to promote offers, advertise and engage with their customers.

TOG and the business community can leverage this platform to engage with visitors to the Town with relevant content, and also to use the data collected via the App (through a process of customer identification) to understand more about the Town’s visitor demographics, which can be used to measure the impact of tourism investment in the Town.

10.1.4 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, which can then be distributed throughout Australia and global websites, such as www.southaustralia.com and www.barossa.com.

The inclusion of all TOG tourism products on the ATDW is a simple and effective way to increase the digital footprint of tourism experiences in the Town. In March 2019, a total of 17 listed on the ATDW specified their service or product was in the TOG, including the Visitor Centre. VIC noted they would like to do more in this space to get more local businesses on ATDW, however currently lack the resources.

When cross referenced with the number of experiences outlined in the tourism asset list it was found many key experiences and events in TOG are not listed (including the Civic Centre Visitor Experiences) therefore missing out on free publicity of the product online.

11. VISITOR SERVICING
11.1 Visitor Servicing Beyond 2020

Visitor Centres (VC), 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 with changing visitor markets and expectations.

Visitor Centres 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.

11.1.1 Visitor Servicing Research

South Australia’s most recent research on the impact and role of regional VCs to the South Australian tourism industry in studies in 2011\(^\text{141}\) and 2012\(^\text{142}\). While there are some relevant insights for the Town, 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 Town.

More recently, Victoria invested in a ‘Victorian Accredited Visitor Information Servicing Survey’\(^\text{143}\), which investigated how accredited VCs 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 accredited Visitor Centre:

- 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 accredited VIC
- 1 in 5 visitors stayed longer in the region as a result of the VIC
- 83% predicted they would do extra activities or go to new places as a result of their visit to the accredited VIC

Visit Victoria also produced a Visitor Information Centre Analysis of international and domestic visitors who visited an accredited Visitor Centre, which provide insights into the different usage of Visitor Centres.

The following insights were identified:

- 18.1% of international overnight visitors to Victoria visited a Visitor Centres, 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 a Centre has remained relatively stable.

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11.1.2 Visitor Servicing Industry Best Practice

While the previous research studies highlight the value accredited Visitor Centres 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.

For the Town, while the Gawler Visitor Centre is receiving positive feedback from visitors for their In-Person Visitor Servicing, it’s recommended more is done by TOG to evolve the Town’s visitor servicing activities, so it supports the Town’s identified High Yielding Visitors Personas (see Section 2.4 in the Tourism Plan 2019-2024) across the purchase journey.

From a Town perspective, recommendations to guide Visitor Servicing 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’.

- **“Visitor Servicing” not “Visitor Information Centre Focused”**. Successful visitor centres 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 Visitor 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.
- **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 (such as visitor hot spots such the Civic Centre and National Heritage Trust Museum) for brochure distribution and invest in proactive activities to growth word of mouth advocacy from everyone living + working in a 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

144 https://tourismeschool.com/blog/12-things-successful-visitor-centres-do-differently/
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
- Growth in database of local residents
- Engage/Conversion metrics with enewsletters
- 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 has having brochure 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, Owned Product Packaging + Distribution
- Retail 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.

11.2 Visitor Servicing Performance

TOG is financially responsible for all operations relating to the TOG Visitor Information Centre (TOG VIC) and offering information services to visitors in the Town. It is located at 2 Lyndoch Road, near the Main Street, and overlooks Pioneer Park. In the last financial year 2017/2018 the TOG VIC received 17,350 visitors in person or enquiries on the phone, with peak seasons being spring and autumn (see section 2).

11.2.1 In-Person

- Feedback from reviews on TripAdvisor and Google (March 2019), reports the TOG VIC provides very efficient, friendly and thorough customer service to all visitors.
- Generally, the staff offer advice and information on tourism experiences in the TOG, which extends to other council regions dependent on the needs of the customer. Volunteers in the centre are well travelled around SA and can offer visitors comprehensive advice for many areas of South Australia.
11.2.2 Bookings

- A manual Booking System used. The TOG VIC uses Vouchers for clients (they pay in VIC + get voucher to give to operator) and then TOG VIC pays Operators less 10%. They sell products all over the state.
- Most tourism operators are ok to take their bookings, but a few refuse to pay the 10%. Anecdotal feedback from some operators is they don’t like the dated, voucher booking system (compared to standard, best practice online booking systems used by most visitor centres around Australia in 2019).
- Bookings depend on the Senior TOG VIC Coordinator being around. When around, sales are much higher, as the Coordinator pushes VIC staff to really engage with visitors (meet them out in the VIC floor, not staying behind the desk). When the Senior Coordinator was away in 2018 for (8 weeks), bookings were down dramatically.
- Offering online bookings for visitors is a key opportunity for the Town to consider as an additional revenue stream for their Visitor Servicing.

11.2.3 Online

- TripAdvisor and Google My Business listings for the TOG VIC are listed and reviews responded to. A business card is handed out in the TOG VIC to encourage online reviews. Opportunity exists to do the same for the TOG managed public visitor assets.
- ATDW listings are managed and updated for key TOG managed visitor experiences. Time permitting, they would like to do more to support local businesses to be listed on TOG.
- No online servicing is provided via Live Chat or via Social Media.

11.2.4 Brochures + Maps

- **Town Maps** - TOG VIC has to use 3 different maps (Gawler Town Map, Gawler River Trails, Barossa By Bike) to show visitors where to ride in town, due to limited space on current town map. The current town map is also very dated, with its whole back side listing street references, and could be put to better use showcasing town cycle/walking trails, itineraries and attractions.
- Tourism businesses in Town who would like to distribute the Gawler Town Map need to pay to have these maps available for their guests, which inhibits wider Visitor Servicing within the Town’s Tourism Businesses.
- The TOG Visitor Guide will be available for visitors from mid 2019.
- For the 4 TOG managed tours and trails (see [https://www.gawler.sa.gov.au/discover/top-attractions/tours-and-trails](https://www.gawler.sa.gov.au/discover/top-attractions/tours-and-trails)) a small print run of hard copies is produced. These brochures are only distributed in hard copy from the Visitor Centre and available to download from the TOG website, as they want Visitors to come to the Centre to find out this information. Barossa VIC also distributes the trail brochures.
- A number of other special interest fact sheets are developed and printed by the TOG VIC (such as the Dining Guide, Accommodation Guide + Gawler Rivers Path, Indoor Activities, Outdoor Activities, Opportunity Shops etc). All are available for download on the TOG website with hard copies available at the TOG VIC.
• TOG tourism experiences have their brochures displayed in the TOG VIC free of charge once they have competed a participation agreement. However, as many businesses haven’t completed the agreement (due to not reading emails/businesses) some are missing out.
• Brochure Hubs - TOG sees itself as a gateway to many of South Australia’s key regions, therefore stocks a large range of visitor guides and operator brochures from outside of the region.

11.2.5 Industry Engagement

• Famils. The TOG VIC works with surrounding regions to invite relevant staff to the Town for famils, such as the upcoming Adelaide Visitor Centre famil of up to 30 staff (mid 2019), and hoping to do the same with Kapunda and Barossa Visitor Centres.
• Industry enewsletter. The TOG VIC currently doesn’t undertake any email communications with local industry due to lack of resources.
• Local Retail and Dining. The TOG VIC has trouble engaging local retail businesses in main street (eg. The “Gawler Go Cup” (takeaway coffee cup) initiative, of which they had only 4 of 21 cafes signing up to offering discount to people who use the cups).
• Service Clubs. The Town has a number of Service Clubs, who raise and invest money back into projects which benefit the visitor economy.

11.2.6 Retail

• The TOG VIC currently manage retail stock in the form of souvenirs and local artisan wares.
• The approximate monthly turnover is $2,000 - $3,000 per month selling (which is an upward trend).
• While the TOG VIC tries to showcase local artisans in their retail mix, selling on consignment, combined with limited resources within the team limits their ability to expand this local retail offering.

11.2.7 Product Offering

• Gawler Bicycle Hub. The TOG VIC is responsible for managing bike hire. Uptake of bike hire is very low, with the TOG VIC reporting only 1 – 2 bikes hire on average a month.
• Tour Guiding. The TOG VIC is currently putting 6 volunteer guides through ‘Guide Training’, so they can provide an even more professional tour guiding experience. Adlib tours are available to groups, such as Probus, Senior Citizen Groups or Special Events (such as History Week). The TOG VIC Senior Coordinator writes scripts for tours, and two 90-minute tours offered to include Church Walking Tour (Sensory Tour - bells ring, organ played + Dan Murphy wine tasking) and a Hotel History tour, visiting some of the Towns 8 historic hotels.

11.2.8 Information Bays

• Civic Guides (a third-party organisation), manages the Information Bays around TOG, and TOG VIC helps them update their information every 2 – 3 years.
12. SWOT ANALYSIS

Throughout the consultation process (ref. section 4) strengths, challenges and threats for the Town were identified. Below is a snapshot of the consistent themes that were discussed, all of which will be addressed in the Strategy and Action Plan.

**Table 12: Strengths, Challenges + Threats for Tourism in the Town of Gawler**
<table>
<thead>
<tr>
<th>STRENGTHS</th>
<th>WEAKNESSES / CHALLENGES</th>
<th>THREAT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Forecasts</td>
<td>Regional</td>
<td>Strategy</td>
</tr>
<tr>
<td>• Positive growth expected for South Australian Tourism Economy (see SA Visitor Economy Strategy)</td>
<td>• Population growth, increased traffic pressure/congestion around TOG.</td>
<td>• Plans are developed and actions not implemented</td>
</tr>
<tr>
<td>Elected Membership &amp; Administration</td>
<td>Elected Membership &amp; Administration</td>
<td>Natural Assets</td>
</tr>
<tr>
<td>• Council recognise the value of visitor economy</td>
<td>• Lack of dedicated Tourism and Events resource in Council – limits ability to address many of the outlined Marketing and Visitor Servicing Challenges</td>
<td>• Urban sprawl will impact the visual beauty, hills, heritage and river landscapes of the town</td>
</tr>
<tr>
<td>Stakeholders</td>
<td>Visitor Experience</td>
<td>• Natural disasters – floods, bushfires</td>
</tr>
<tr>
<td>• Active and passionate visitor economy advocates in town (Gawler Wheelers, Gawler History Team, Sporting Groups)</td>
<td>• Deficiency of vibrant retail/food/dining offerings in Gawler Main Street and surrounding park precincts</td>
<td>• Climate change trending longer periods between rain events, causing dry rivers.</td>
</tr>
<tr>
<td>Natural Beauty</td>
<td>• Under-investment of private tourism enterprises</td>
<td>Consumers</td>
</tr>
<tr>
<td>• Quintessental South Australian town, Main Street Buildings, picturesque rivers and parks, heritage buildings (including many pubs)</td>
<td>• Apathy by local businesses to visitor economy (lack of understanding/too busy in own business/opening hours)</td>
<td>• Changes in consumer confidence, interest rates and exchange rates</td>
</tr>
<tr>
<td>Infrastructure</td>
<td>• Lack of size and range of accommodation types (large groups or higher end visitors not catered for in TOG)</td>
<td>Stakeholders</td>
</tr>
<tr>
<td>• New Civic Centre and it’s Heritage + Cultural Experiences</td>
<td>• Lack of size and range of events to tell the Town’s stories and attract relevant visitor groups</td>
<td>• Loss of Visitor Economy Champions from town/council</td>
</tr>
<tr>
<td>• Trails Network - Stuart O’Grady Bikeway (from Northern Adelaide), Barossa Trail (to Barossa) and River Trails (around town)</td>
<td>• Limited night-time experiences other than pubs</td>
<td>• Change in State Government and/or SATC staff and marketing investment / product development</td>
</tr>
<tr>
<td>• Gawler Bike Hub - showers/toilets/water/secure storage/bike hire</td>
<td>• Lack of clear, safe and enjoyable trail connections/transits between SOB, JBT, River Trails, Gawler Bike Hub and Train stations</td>
<td>History Preservation</td>
</tr>
<tr>
<td>Access</td>
<td>• Cyclist Safety - cycle lanes end abruptly, unconnected trails/confusing/unclear trail connections, very busy traffic around main street, maintenance of trails (debris/glass), dogs off leashes putting cyclists on trails at risk.</td>
<td>• The heritage and cultural aspects of Town of Gawler are a unique selling point and if these are not preserved/captured for successive custodians they will be lost</td>
</tr>
<tr>
<td>Planning, Infrastructure, Placemaking + Public Assets</td>
<td>• Gawler businesses are not very cycle friendly (limited welcome to cyclists to town, lack of cycle friendly cafes and restaurants.)</td>
<td>Competition</td>
</tr>
<tr>
<td></td>
<td>• Lack of visitor experience at Gawler Cycle Hub - no cafe/restaurant</td>
<td>• Popularity of other destinations offering a diverse experience for visitors.</td>
</tr>
</tbody>
</table>
• Proximity to Barossa wine region, as well as surrounding tourism regions (Adelaide, Adelaide Hills, Clare Valley)
• Easily accessed from Adelaide by road and rail
• Cycle connectivity - from Adelaide via train (bring bike) or SOB and from Barossa via JBT.

Visitor Servicing
• Professionally run VIC with knowledgeable VIC staff
• Good relationships with Kapunda and Adelaide Visitor Centres (referral traffic)

• Signage - lack of clear signs connecting cycle trails, wayfinding around town (inc train stations), main highway tourist signs, welcome to town
• Lack of trail connection between SOB, JBT, River Trails, Train Station, Bike Hub
• Cyclist support services - Lack of public toilets, bike repair, shelter, signs, water on trails (SOB) as well as bike racks around town
• Train Stations - Poor sense of welcome and placemaking
• Grading of rides - doesn’t existing (easy/medium/hard)
• Parking - in Main Streets especially RV and Caravan Visitor, at Cycle Trails for cyclists to leave bikes
• Traffic congestion around Main Street and town centre (poor cycle experience)

Brand and Marketing
• Lack of awareness, negative perceptions and lack of advocacy of what to see and do around town (locals, wider industry, visitors)
• Unclear/unknown visitor brand
• No strategic or coordinated destination marketing activities
• Lack of customer profiling to identify what experiences in town will attract different customer profiles
• Perceived as pass through town on way to Barossa/Flinders Ranges
• Lack of clarity and coordination in economic development in Gawler for different areas of marketing in the town (VIC/GBDA)
• Lack of marketing of key tourism assets of the Gawler Civic Centre (and all business units within)
• Lack of funds to invest in marketing and product development
• Limited marketing support from Tourism Barossa (although TOG do not fund TBI)
• Lack of awareness of cycle trails and bike hub (locals and visitors)
• Lack of unified cycle maps and cycle trail itineraries for visitors cycling to/around town and Barossa/Adelaide

Visitor Experience
• Limited visitor experience in TOG: 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.

Visitor Information + Servicing
• Lack of implementation of best practice visitor servicing and dated visitor servicing mindset the “Visitors must come to Visitor Centre” to get visitor guides and maps
• Lack of strategic leadership for TOG VIC.
• Limited skills or resources to adequately evolve the Visitor Servicing to online and outreach activities
• Volunteer culture reactive not proactive customer service and sales
• TOG VIC retail product not reflective of best practice visitor centre retailing (unique/local/interesting retail offerings)
• Lack of referrals from neighbouring VIC, including Barossa
• Lack of visitor information available online about what to see/do in TOG
- Lack of online bookability by the Centre, creating manual and slow booking system, which receives negative feedback from industry.
- Lack of strong relationship between TOG VIC tourism operators outside core accommodation offering
Below is a list of high-level opportunities for implementation over the short, medium and long term as outlined in the Action Plan.

### Table 6 - Visitor Economy Opportunities for TOG

<table>
<thead>
<tr>
<th>OPPORTUNITIES</th>
<th>OPPTUNITIES</th>
</tr>
</thead>
</table>
| Resourcing, Governance + Collaboration | • Qualified and skilled resources and budget allocated for new Plan (specifically resourcing, and marketing activities)  
• MOU’s developed with the Town’s stakeholders (eg GBDG, NTSAG, RDA BGLAP, GHT) to align efforts to achieving the new Plan.  
• Industry Education - Tourism Plan communication schedule developed and implemented to educate all Stakeholders (Elected Members, Residents, Tourism Operators + Local Business) on the relevant opportunities for each group  
• Advocate for cross collaboration and communication between relevant stakeholder groups within the Town |
| Strategy | • Report on the achievements of the actions within this Plan annually to relevant stakeholders  
• Educate all levels of industry and stakeholders on the importance and value the visitor economy can bring to the Town |
| Brand + Positioning | • Develop TOG centric visitor messaging to be used when promoting the TOG visitor experience  
• Educate industry on how to leverage Gawler brand stories and storylines |
| Market Segments | • Potential growth markets for consideration:  
  o Generational - Baby Boomers, Millennials  
  o Life Stages - Families, DINKs/SINKs  
  o Niche Market Segments – Caravan and Camping, Business Events, Cruise, Sport  
• Niche Interest Segments – Arts, Heritage + Culture, Cycle, Nature-Based  
• Engage with DEW on activation of Nature Based Product Development + Heritage Tourism |
| Visitor Experience + Product Development | • Grow the quality and quantity of Visitor Experiences in the Town of Gawler – focusing on its strengths + hero products that will attract the identified ideal customers + niche visitor segments and markets. Specifics include History, Heritage and Culture (More immersive experiences), Aboriginal (Tours/Workshops/Performance/Storytelling), Cycle (MTB network), Trails (Connectivity – New Developments/Visitor Hubs/Itineraries/Intra Town and Inter Regional Connectivity – Adelaide Wine Capital Trail).  
• Grow the Cycle Culture + Experiences in the town – Bike Friendly Business Program, Leverage Bike SA Programs, Activate Local Riders, Expand Cycle Hire, Cycle Retailer/Mechanic attracted to Town Centre  
• Advocate for the development of more diverse and vibrant Food and Dining experience with the Town, including potential activation at Clonlea Park and TOG VIC.  
• Professional development for industry stakeholders in best practice marketing and visitor experience  
• Advocate for the attraction of private investment into larger scale accommodation offerings and upgrades of existing accommodation  
• Industry Engagement to connect them with opportunities to grow their businesses (eg. TB membership, marketing up skilling, ATDW) |
- Grow the quality, quantity and marketing of events in the Town which drive town vibrancy and attract the identified ideal customers + niche visitor segments and markets
- Identify and apply for relevant grants to activate relevant projects within the Plan
- Connect relevant business and organisations with relevant grant opportunities
- Work with State Government to ensure policies support Visitor Economy activation and enable small businesses to expand and deliver visitor experiences in the Town

**Infrastructure**

- Ensure Visitor Economy projects/impacts considered as part of Town Centre Framework and other TOG Planning and Maintenance, such as Community Facilities, Parks, Placemaking and Trails to positively support activation of the Visitor Economy
- Improve visitor signage around the Town including wayfinding, interpretive, directional, placemaking and tourist trails.
- Continue to support the delivery of WiFi and high-speed internet at key visitor locations
- Maintain Parks, Trails and Public conveniences to a high standard
- Further Activation of Gawler Main Street as a visitor experience
- Improve welcome and visitor information at Gawler Central and Gawler Railway Station
- Improve parking options for RV/Caravan travellers in Town centre and at Trail-Heads for cyclists
- Activate Cycle Trail Networks, as per the actions in the TOG Cycle and Walking Plan 2018 – 2028
- Trail infrastructure - Water/Repair Stations/Toilets/Parking/Bins at start/end etc on Trails (toilets and water noted on SOB)
- Investigate the potential to develop environmentally sensitive MTB Network of Trails

**Marketing**

- Develop, implement and report on visitor-focused marketing activities annually to drive demand of the Town’s identified Ideal customers and niche segment groups, including new website, social media and email marketing activities.
- Professional development for staff responsible for TOG Destination Marketing to ensure best practice implementation of marketing activities.
- Increase photo and videos of key TOG visitor experiences
- Increased storytelling and suggested itineraries of what to See and Do around Gawler on owned and key third party websites
- New destination website specifically promoting key experience in Gawler (eg www.visitgawler.com.au), while in short term increase information and inspirational information about TOG key experiences, for the identified customer niches on current council website.
- Increase # of Towns listings on ATDW, including AirBnB and events
- Increase digital footprint and online storytelling by tourism businesses in TOG
- Increase in online advocacy for TOG experiences on relevant Review Websites and Social Media
- Partnership marketing with relevant brands + stakeholders to further activate niche markets + interest segments
- Marketing plans developed for TOG Managed Heritage + Cultural Experiences - Heritage Gallery Exhibitions, Gawler History Collection
- Grow awareness of Gawler Cycle Friendly Destination, such as promotion of Gawler as a cycle hub to explore surrounding regions, promotion of cycle hub + hire facilities, promotion of experiences on cycle trails, advocacy/partnership with passionate cyclists in TOG
- Advocacy Plan Developed – for residents, local businesses, consolidation of user generated hashtags

**Visitor Servicing**

- Review TOG VIC activities and investment for alignment with best practice Visitor Servicing and the Tourism Plans identified Ideal Customers.
- Evolve Town’s Visitor Servicing via the development of Strategic Visitor Servicing Plan – outlining visitor servicing tactics (on and offline visitor servicing + bookings), visitor servicing location/s, industry engagement activities, partnerships with surrounding VICs, collateral development + distribution, customer service standards
- Visitor Collateral overhaul – review, consolidate, update existing visitor collateral to better share what to see and do in the Town, including distribution strategy.
- Publish/distribution of Gawler Cycling Guide – Gawler and Surrounds (print/online)
- Simplify and streamline TOG Town Map to include cycling trail and suggested itineraries on the back (currently 3 maps are required when riding in TOG)
13. ACKNOWLEDGEMENTS

The Town of Gawler Tourism Situation Analysis (July 2019) has been developed through extensive consultation with key tourism stakeholders across community, industry, business and government.

Stakeholder insights were gathered through the following sources during February - July 2019:

- Via 43 responses through online survey of residents, community groups, local government, industry and government staff (March 2019)
- Over 15 elected members and key stakeholders were involved in 1 face to face consultation workshops in Gawler (March 2019)
- Individual meetings were also conducted with key government and industry stakeholder organisations (February-July 2019)

Table 14: Tourism Stakeholder Engagement Summary

<table>
<thead>
<tr>
<th>Local and State Government</th>
<th>Industry + Community</th>
<th>Local Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Town of Gawler Council staff + elected members (including Visitor Centre and Heritage Collection)</td>
<td>Gawler Business Development Group</td>
<td>40 + Local Residents, Business Owners and Tourism Providers in the town via industry Workshop + 1:1 phone meetings including Gawler Caravan Park, Red Centre Enterprises.</td>
</tr>
<tr>
<td>Barossa Council (Via Barossa Visitor Information Centre Manager)</td>
<td>Bicycle SA</td>
<td></td>
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<tr>
<td>Light Regional Council</td>
<td>Barossa Tourism</td>
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<tr>
<td>South Australian Tourism Commission</td>
<td>Regional Development Australia Barossa</td>
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<tr>
<td></td>
<td>Gawler History Team</td>
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<tr>
<td></td>
<td>National Heritage Trust of SA – Gawler Branch</td>
<td></td>
</tr>
</tbody>
</table>
14. REFERENCES

In addition to the references footnoted throughout the Tourism Situation Analysis, following is a summary of all resources referenced in this document.

- Australian Wine Capital Cycle Trail, October 18
- Barossa Region Cycle Tourism Strategy 2017
- Economy.ID
- Establishing the Adelaide Mount Lofty Ranges Region as an international mountain bike destination, July 15
- Gawler Arts and Culture Strategy 2016 – 2025
- Gawler Business Identity Session, April 17
- Gawler Invest
- Gawler Town Centre Parking Strategy Report 2017-2020
- Gawler TDU Bid Media Coverage, Bunyip Press, Feb 19
- Gawler Urban Rivers Master Plan
- RDA Barossa Regional Action Plan + Economic Priorities
- Regional Heritage Strategy 2014 – 2020
- SA Bike Economy Industry Roundtable Nov 17
- SA Recreational Trails 10 Year Masterplan 2015-2025
- South Australia Visitor Economy Sector Plan 2030 – Draft for Industry Feedback
- The South Australian Bike Economy
- Tourism 2020
- Tourism Australia International Marketing Profiles
- Tourism Australia Market Profiles
- Tourism Barossa Membership Prospectus (2018)
- Tourism Barossa Strategic Plan 2017 - 2018
- Tourism Research Australia (TRA)
- Town of Gawler Community Plan 2017 - 2027
- Town of Gawler Walking and Cycling Plan 2018 – 2028