Growing Business

Tourism Marketing Strategy

Coorong District Council & Limestone Coast Tourism

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1.0 Executive Summary

The tourism marketing strategy has been prepared with realistic, achievable goals and objectives that will maximise the opportunities provided to tourism operators within the Coorong District Council area. It is constructed in a manner that provides linkages with the marketing strategies of major industry stakeholders such as the South Australian Tourism Commission (SATC), Regional Tourism Marketing bodies and the National Parks and Wildlife Service.

A tourism audit was undertaken as part of the study to identify the key assets within the Coorong District Council Area. This incorporated accommodation, transport and tour operators as well as attractions and natural assets in the region. This examination found that there were gaps in the provision of products and services within the region particularly in the area of accommodation and visitor services.

A market analysis identified key markets on a geographic basis as the Adelaide and South Australian markets, the interstate markets of south western Victoria, Melbourne and Sydney, and the European, UK and South East Asian markets internationally. Consideration was also given to visitor behavioural and value segmentation as well as experiences provided in the identification and development of tourism markets.

A number of recommendations were formulated including the formation of a 'Coorong Operators Group', a focus on destination specific marketing and providing opportunities for operators to participate in clear and concise marketing activities based on precise identification of their target markets.

2.0 Background

The Coorong District Tourism Marketing Strategy was commissioned by Limestone Coast Tourism in partnership with Fleurieu Tourism and Murraylands Tourism in March 2002. The aim was to provide opportunities for tourism operators to work with Limestone Coast Tourism, Fleurieu Tourism and Murraylands Tourism in the promotion of their business and their region.

Over the last two years, a number of regional marketing boundaries have changed within South Australia. Consequently, the Coorong District Council area now falls within the Limestone Coast tourism region. One of the major assets within the Coorong District Council area is the Coorong National Park. Prominence has been placed on the Coorong National Park through the International Year of Ecotourism and an increasing popularity amongst visitors.

With an increase in visitation to the region, operators within the Coorong District Council area need to be adequately prepared to capitalise and manage the increasing demands and opportunities provided in the market place.

Consequently, the project has encompassed the geographic boundary of the Coorong District Council that contains areas of the Mallee, Princes and Dukes Highways. Major townships in the project area include Coonalpyn, Meningie, Tailem Bend, and Tintinara.

The project methodology has included industry consultation as well as an extensive desktop audit to identify the key strengths, weaknesses, opportunities and threats facing operators within the Coorong District Council area.

Following analysis of the desktop audit and consultation process, perceived gaps within the Coorong District Council area were identified. Strategies were then developed to optimise the exposure of products within the Coorong District Council area and assist operators in providing a means of filling the perceived void.

3.0 Tourism Audit

One of the comparative strengths or weaknesses in any area is the products, services and amenities available to the tourism visitor. It is therefore necessary to consider what range of products and services are currently available to visitors within the Coorong District Council area (CDCA) so that gaps can be identified and strategies developed to fill these gaps.

The tourism audit process has been undertaken using a combination of sources including desktop searches of tourism literature as well as on site audits and one-to-one interviews.

3.1 Accommodation Profile

There is a wide range of accommodation available in the CDCA including hotels, motels, self-catering, caravan parks and camping grounds. Most of the accommodation is found within the major towns of the region such as Meningie, Coonalpyn, Tailem Bend and Tintinara. The standard is generally within the budget to moderate accommodation range.

A large number of caravan and camping sites are available throughout the CDCA in diverse locations with the greatest concentration spread on a controlled basis throughout the Coorong National Park. Most of the caravan and camping parks are distributed around key assets or arterial roadways within the CDCA.

There are very few bed and breakfasts within the CDCA and these are primarily concentrated along the Dukes Highway. Hotel accommodation is also primarily along the same arterial roadway.

The number of rooms and caravan/camping sites is comparably lower than other regions particularly considering the geographic size of the CDCA. Neighbouring council areas within the Limestone Coast and Fleurieu tourism regions have a greater variation and number of accommodation types and standards.

Occupancy rates vary according to property and accommodation type/styles, but significantly, the accommodation with the highest occupancy levels are found within the major townships of the region. Many of these have a high degree of corporate travellers as overnight visitors. However, visitation from tourists is still a major source of income for these establishments.

Many of the visitors ‘match’ the regional tourism profile (discussed later in this report) with intrastate, interstate, and international visitors being representative of the visitor group. The international visitors are identified as coming from UK, Europe (predominantly German speaking countries of German, Austria, Switzerland). Bed & breakfast and self-catering accommodation operators indicated that their primary markets are intrastate and interstate whereas areas for camping and hotel/motels indicated they had 'good numbers' of international visitors. The location of the business appeared to have a significant impact in relation to the major market for each business.

Marketing by accommodation providers varies from business to business. Some businesses are very active in the market place linking their accommodation with other providers for cooperative advertising opportunities and packaging. However, these marketing activities are generally the exception and not the case for all providers of accommodation within the CDCA.

Many providers consider marketing to be secondary to the running of their business. Marketing activities for operators included brochures, advertising in regional visitors guides, AAA, Jasons Guide, the Tattler, the Coorong Map, formulating shorts packages and website production. Word of Mouth is considered to be a strong marketing tool for a lot of accommodation providers.

Notably, there have been discussions regarding potential for further accommodation development within the CDCA but as yet, building works have not commenced. The summary of current accommodation facilities is as follows:

Establishment	Accommodation Type	No. of Units	'AAA' Rating
Coonalpyn Coonalpyn Hotel	Hotel	13 units	N/a (1.5–2 star)
Coonalpyn Soldiers Memorial Caravan Park	Caravan Park	42 sites 1 cabin	2.5 star 2.5 star
Meningie Lake Albert Motel	Motel	12 units	3 star
Meningie Waterfront Motel	Motel	10 units	2 star
Meningie Hotel	Hotel	8 units	N/a
Mill Park Cottage	Self catering	1 cabin	3.5 star
Coolabah Cabin	Self catering	1 cabin	N/a
Camp Coorong	Dormitory	4 bunk houses	N/a
Coorong Wilderness Lodge	Cabin Camping	4 cabins N/a	N/a N/a
Lake Albert Caravan Park	Caravan Park	75 sites	3 star
Coorong National Park	Camping	260 sites	N/a
Narrung Poltalloch Station	Self catering	4 cottages	N/a
Policeman's Point Coorong Hotel/Motel	Hotel/Motel	4 units	N/a (2.5 star)
Coorong Caravan Park	Caravan Park	146 sites 6 cabins	1 star 1.5 star

Salt Creek Gemini Downs Holiday Units	Self catering	4 units	2.5 star
Gemini Downs Holiday Centre	Caravan Park	30 sites 4 cabins	1 star 2.5 star
Tailem Bend Motel River Bend	Motel	14 units	3 star
Rivers Edge Caravan Park	Caravan Park	60 sites 4 cabins	2 star 2.5 star
Westbrook Park River Resort	Caravan Park	50 sites 6 cabins 1 bunk house	N/a (2.5 star)
Tintinara Tintinara Hotel	Hotel	10 units	N/a (1 star)
Tintinara Motel	Motel	8 units	N/a (2.5 star)
Odea's B& B Cottage	Self catering	1 cottage	N/a (3.5 star)
Tintinara Caravan Park	Caravan Park	7 sites	N/a (2 star)

3.2 Transport and Tours

Like the accommodation sector, there are a number of varying and diverse transport and tour providers that utilise or travel through the CDCA. These include 4WD, coach, (mini) coach and varying water-based options. Major access to the area is via roads such as the Dukes, Mallee and Princes Highways. These are heavily utilised by traffic travelling between Adelaide and Melbourne (and other areas of the state) and between Sydney and Adelaide.

Transport providers between Adelaide and Melbourne use both the Dukes Highway for direct travel and the coastal route and the Princes Highway for the scenic extended duration trips.

There are a number of tour operators based in Goolwa and Adelaide who access the CDCA via the waterways. These operators capitalise on the large numbers of travellers into the Fleurieu region who wish to experience nature based tourism opportunities and the Coorong. A new vessel is planned to be launched shortly by one of the major operators from Goolwa that will further encourage visitation by the day tour market from Adelaide.

The customer profile varies from operator to operator depending on their market attractiveness and target markets. However, the interstate market is generally significant for all operations with varying support from the local intrastate and international markets. Market segmentation as well as target markets are talked about in more detail later in this report.

The main concentration of tour operators within the CDCA is along the Coorong National Park due to the diversity that the area offers. There are also some minor extended touring activities that occur in the Mallee Parks areas.

Amongst the group of tour operators, the Goolwa operators appear to be more organised and coordinated, taking advantage of participation in major domestic and international programs that are packaged together to provide a unique experience for visitors. These packages capitalise on the flow of traffic from Adelaide and link with other key operators to provide a product that expands over the Limestone Coast, Fleurieu and Kangaroo Island.

Furthermore, a number of operators from Goolwa have collaborated to formulate partnerships in selected advertising activities across the Fleurieu and Limestone Coast. They have a good understanding of their markets that primarily include interstate visitors and a growing amount of international visitors from the UK, German speaking countries and the US.

High participation rates by the international market would tend to indicate the operator has a high degree of development and complexity and this is represented by their ability to penetrate the international market place. Some operators utilise most of the mainstream promotional means available including brochures, advertising, personal selling, promotions and websites, whilst others focus on different components of the promotional mix.

Tour operators travelling into and based in the CDCA have the ability to draw on local resources and link them in a manner that maximises exposure for all. To that end, they must be seen as critical elements in the tourism mix for the CDCA. A summary of the transport and tour options is as follows:

Company	Type of Tour	Tour Area/Information
Adelaide Accompany Outdoors	Outdoor touring	Provide itineraries and infrastructure for school groups travelling within the region
Blue Water Sea Kayaking	Kayak	Offers ½ day to extended kayaking tours through waterways and Coorong lakes areas
Premier Roadlines	Transport provider	Offer express coach services between major points travelling through region
Wayward Bus Touring Company	Mini coach	Extended mini coach tours for the backpacker market.

Coonalpyn Coorong Coaches	Coach	Coach charter company undertaking day and extended tours in and out of CDCA.
Crosswind Charters	Sailing cruise	Sailing cruise trips of varying lengths on Coorong and Murray lakes
Goolwa Coorong Cruises	Cruise	Day cruises to Coorong National Park via waterways
Spirit of the Coorong Cruises	Cruise	Day cruises into Coorong National Park via waterways
Mundoo Island & Coorong Tours	Mini coach	Mini coach company offering tours of Mundoo Island cattle station on demand.
Meningie Camp Coorong	Indigenous tourism	Indigenous cultural experience.
Coorong Experience	Cruise	Coorong National Park via waterways
Coorong Wilderness Lodge	Indigenous tourism	Guided walks interpretation and indigenous experience.
Narrung Coorong Nature Tours	4WD	4WD tours to Coorong National Park, Mallee Park and other areas of Limestone Coast – birdwatching specialty
Poltalloch Station	Guided walking	Heritage walking tours of homestead and settlement area of Poltalloch.
Victor Harbor Victor Harbor 4WD Tours	4WD	Offers day and half day charters and tours to various areas of Coorong National Park

3.3 Attractions and Natural Resources

Attractions and Natural Resources are an integral part of the tourism product for any region. Like the tour and transport types in this report, there is a diverse range available for the tourist spread throughout the CDCA. The major focus of attractions is utilising natural assets. These are the National and Conservation Parks within the CDCA. There are also other attractions within the CDCA that are 'man-made' that also attract visitors.

These attractions provide a blend of activities to encourage visitors to increase their length of stay or act as a motivation in drawing visitors to the region. Like the tours, they are based around the themes of nature, heritage and indigenous activities that are discussed later in this report.

Customer profiles also vary greatly according to the product offered. These are consistent with the same profile for the accommodation and tour operators with the core customers being interstate with varying degrees of clientele from intrastate and overseas markets.

The Coorong National Park is considered to be a major asset within the CDCA. Whilst it is a large expanse geographically, management of the park has been structured in a manner that concentrates access to six major areas within the park (Godfrey's Landing, Long Point, Parnka Point, Jacks Point, Salt Creek, and 42 Mile Crossing).

Interestingly (through anecdotal feedback), the intrastate market appears to be more inclined to visit the attractions that are non-iconic (i.e. craft shops/nurseries). Other natural attractions and more 'unique' attractions appear to attract a wider cross section of visitors.

For the purpose of the report, natural assets within the CDCA have been examined, as have 'commercial' tourism attractions. Monuments and lesser profile attractions have not been examined. In the following audit, the attractions or resources have been listed under the closest township to provide assistance with location:

Attraction	Feature	Summary
Coonalpyn Daisy Patch	Nursery	Nursery featuring unique flora from arid/mallee areas. Guided walking tours when operator available.
Carcuma Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching
Mount Boothby Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching
Meningie Camp Coorong	Indigenous Tourism	Attraction relating to history of the area and Indigenous cultural experience.
Coorong National Park	National Park	Natural attraction identified as a key feature for the region. Provides a range of tourism experiences including bush walking, birdwatching, 4WD and camping.
Coorong Wilderness Lodge	Indigenous Tourism	Tourism experience providing Indigenous food and cultural interpretation.
Tailem Bend Old Tailem Town	Attraction	Pioneer village with interactive displays & over twelve streets and 98 buildings.
Tintinara Kevin Powrie Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching
Mount Rescue Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching
Tintinara Heart of the Parks	Art/craft centre	Centre that provides a range of goods including art and crafts for sale. Also doubles as a VIC.
Tintinara Homestead	Historical site	Site is a heritage type attraction that relates

		to some of the first settlement in the area. The Shearing shed on the site is heritage listed.
Salt Creek Martin Washpool Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching
Messent Conservation Park	Conservation Park	Natural Asset providing walking trails and birdwatching

3.4 Summary of Activities

Following the audit of the tourism assets in the regions, it is identified that the CDCA provides the following activities:

- Bird-watching
- Boating
- Bushwalking
- Camping
- Canoeing
- Cruises
- Cultural activities
- Cycling
- Educational study
- Fishing
- 4WD Experiences
- Horse riding
- Indigenous Experiences
- Photography & painting
- Recreational uses
- Sailing/yachting
- Scenic touring
- Shack holidays
- Sightseeing
- Trail biking
- Water skiing

3.5 Visitor Information Centres

Visitor Information Centres (VIC's) play an important role in the dissemination of information to visitors travelling within the local area. Their main purpose is to encourage visitation by tourists to local operators (accommodation, tours and attractions) and to facilitate longer stays within the region.

VIC's are located throughout South Australia and are considered either 'accredited' or 'non-accredited' facilities. Accredited facilities, along with other criteria, need to have a paid employee on site and be open seven days a week. Generally, the accredited facilities are dedicated tourism precincts and tourism is the primary purpose for existence.

There are a number of significant VIC's in major tourism areas such as Adelaide, Port Augusta and Mount Gambier that have large visitor volume. Such centres provide tourist information on the CDCA even though they are outside of the geographical area. The same principle applies in reverse. VIC's within the CDCA also provide information on other regions in South Australia including the Barossa, Kangaroo Island, Fleurieu and Adelaide.

There are a number of Visitor Information Centres throughout the CDCA. None of the facilities are accredited and their role of visitor information is shared with other business within the same building. Information provision varies from site to site with only Tailem Bend offering consistent visitor statistics over previous years. The surrounding VIC's within the Limestone Coast region are also examined to assist in the dissemination of visitation statistics and profiling later in the Limestone Coast profile in the report.

The VIC's that provide information to tourists in the CDCA are listed as follows:

Centre	Location	Type of Facility
Tailem Bend Visitor Information Centre	Tailem Bend	Shared Centre
Melaleuca Tourist Information Centre	Meningie	Shared Centre
Heart of the Parks	Tintinara	Shared Centre
Shoestring Kitchen	Coonalpyn	Shared Centre
Jabuk Store	Jabuk	Shared Centre

4.0 SWOT Summary

The following situational (SWOT) analysis was generated through discussion with stakeholders and data research from previous studies and is a summary of the perceived **S**trengths, **W**eaknesses, **O**pportunities and **T**hreats of the CDCA. It is important to clearly identify these elements as they formulate the platform for the marketing strategies to be derived considering the region's capabilities as they relate to the market.

Strengths	Weaknesses
▪ Recognition of the "Coorong' Name ▪ Being part of Limestone Coast Tourism ▪ Coorong National Park ▪ Coorong National Park recognised by RAMSAR Convention for wetlands ▪ Highly visited Region ▪ Proximity – relatively short distance from Adelaide ▪ Accessibility via sealed roads ▪ Diversity of the product within the region ▪ Climate is mild (Mediterranean) ▪ Uncrowded ▪ 'Authentic '/natural experiences ▪ Unspoilt nature ▪ Aboriginal significance and authentic experiences ▪ Region incorporates three major highways through the state including Adelaide to Melbourne and Adelaide to Sydney ▪ Range of National and Conservation Parks within the region ▪ Range of birds within the region ▪ Access to parts of the River Murray ▪ Park and garden areas within region that stop traffic ▪ Increasing travel to Coorong ▪ Migratory birds within the Coorong ▪ Waterways are relatively sheltered ▪ Some areas of the Coorong National Park are only accessible by boat ensuring pristine environments	▪ Lack of infrastructure provision including power/water supply ▪ Poor signage ▪ Defragmentation of the tourism industry ▪ Poor communication within the region ▪ Lack of cohesion between operators ▪ Low awareness both internationally and domestically of what the Coorong is/represents ▪ Lack of tourism visitation to ensure sustainability by private enterprise ▪ Lack of business/marketing skills within the region ▪ Lack of customer service skills development with non core tourism operators ▪ Parochialism by groups within the region ▪ Large geographic area with low population base for rate collection ▪ Lack of eating places – restaurants/cafes ▪ Accessibility to certain areas for all traffic types ▪ Lack of moderate and superior accommodation ▪ Lack of 'structured' activities for family groups ▪ Lack of 'sub-regional' research information ▪ Lack of airline provision/infrastructure ▪ Seasonality due to poor perception of the climate ▪ Lack of information regarding specific birding opportunities ▪ Only two endemic birds in SA ▪ Under utilisation of 'Mallee Parks' ▪ Lack of structured tours within the region ▪ Parts of region isolated ▪ Water access primarily located at Goolwa end of the Coorong ▪ Seen as a touring base not a destination ▪ Lack of commercial operators ▪ Lack of critical mass (visitors) ▪ Poor operator perception of marketing ▪ Non arterial roads are substandard

Opportunities	Threats
▪ Growing Tourism market to South Australia ▪ Poor exchange rate AUD providing more overseas tourists ▪ Trend for Australians to holiday in Australia ▪ Development of linkages with surrounding tourism areas/regions ▪ Development of ecotourism and nature based experiences ▪ Capitalisation on increased exposure through Year of Ecotourism ▪ Development of sustainable indigenous experiences ▪ Capitalise on 'drive' market promotion undertaken by SATC ▪ Increased networking to develop packages of activities and accommodation ▪ Cooperative marketing to use dollars more efficiently ▪ Money available from state and federal governments due to focus on Coorong ▪ Growing interest in birdwatching tourism ▪ Use of the internet to target specific markets ▪ Redevelopment of Goolwa Wharf precinct to facilitate water entry into Coorong National Park ▪ Increasing number of self drivers travelling through region ▪ Sponsorship opportunities for events	▪ Closure of Murray Mouth and the effect on the Coorong bird life and water based recreational activities ▪ Restricted access to some areas within National & Conservation Parks ▪ Uncontrolled tourism visitation ▪ Increasing visitation numbers preceding tourism planning ▪ Continued exodus of young people from the region ▪ Loss of bird life ▪ Increasing competition ▪ Competition from other regions providing special interest tourism ▪ Apathy by the local community ▪ Increasing fuel costs ▪ Professionalism of other areas ▪ Changing nature of government (local and state) ▪ Professionalism of other competitors ▪ Increasing insurance costs

4.1 Planning Assumptions

Whilst there have been catastrophic world events in recent months, the formulation of this report has taken into account the impact on world tourism. A number of points have been identified disclosing any assumptions made in the preparation of this report and subsequent marketing strategies. These are listed as following:

- South Australia does not have a huge number of international tourists and therefore is less vulnerable to travel patterns by international tourists.
- The backpacker market (for South Australia primarily made up of Europeans) is more robust and likely to still continue to travel
- South Australia and Australia are seen as a 'safe' destination to travel to by international tourists
- Domestic tourism is likely to increase due to travel fears and the poor exchange rate of the Australian dollar
- Statistical information and reports undertaken by other bodies are considered to be accurate including the consequent assessments on market potential and growth trends

5.0 Market Evaluation

In 1999, tourism generated $3.1 billion of expenditure and supported employment estimated at 36,000 full time equivalent jobs. South Australia receives around 5.9 million visitors and 25 million visitors nights annually.[1]

The twelve months to the end of June 2000 display that South Australia attracted 350,100 international visitors and 5.1 million visitor nights. On a domestic basis, the last twelve months to December 2001 show that interstate markets generated 1,855,000 visitors to South Australia who spent 8,596,000 nights in SA[2]. Victoria and New South Wales are the states most important markets providing 37% and 30% of the state's interstate visitor nights respectively.

Intrastate in the twelve months ending December 2001 South Australians made 3,674,000 'net visits' within their own state staying for 10,912,000 nights. [3]

5.1 Regional Segmentation

The CDCA is part of the Limestone Coast tourism region following recent redefining of regional boundaries. The CDCA borders the Fleurieu Peninsula, Murraylands and Riverland tourism regions.

The positioning of tourism assets within the CDCA provides natural linkages between the Fleurieu Peninsula and Murraylands tourism regions more than the Riverland. Consequently, these two regions are considered in the analysis of the visitation statistics and target market profiling.

5.1.1 Limestone Coast Region

The Limestone Coast region, one of the most popular regions outside of Adelaide, enjoys an abundance of tourism traffic with over 646,000 domestic visitors and over 1.69 million visitor nights in 2001.

Visitor statistics from the National Visitor Survey indicate that in the 2001 calendar year there were 392,000 overnight visits to the Limestone Coast region by South Australian residents, 254,000 visits by interstate residents.[4] 45,000 international visitors stayed overnight in the region for the calendar year 1999/2000. This is the second highest visited region by numbers and in nights for interstate visitors.[5]

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[1] Source: South Australian Tourism Commission (SATC) At A Glance February 2002
[2] Source: National Visitor Survey – December 2001
[3] Source: National Visitor Survey – December 2001
[4] Source: National Visitor Survey – December 2001
[5] Source: South Australian Tourism Commission (SATC) Limestone Coast (South East) Tourism Profile 2001

South Australian visitors stayed for 1,141,000 nights, interstate visitors stayed 556,000 nights and overseas visitors spent 77,000 nights in the region.

Expenditure by domestic visitors in the Limestone Coast (both overnight and daytrip) in 1998 has been estimated by the Bureau of Tourism Research to be $157 million[6].

It was also found that domestic visitors in the Limestone Coast region had the following profile:

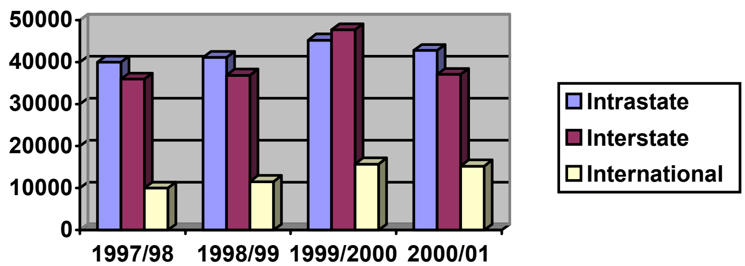
- 65% of overnight visitors stay in the region for 1 - 2 nights;
- 47% of domestic visitors were visiting for holiday purposes, 26% were visiting friends or relatives while 22% were travelling for business or conference;
- 2% of domestic visitors were spent in a hotel/motel, 36% were in a caravan park or camping ground, 23% were spent in the home of a friend or relative while 7% of nights were spent in the visitors own holiday home.[7]

Visitation to the region is well displayed through examination of the Limestone Coast VIC Profiles in Figure 1. These graphs represent the accumulated breakdown of visitors in each of the VIC's within the Limestone Coast region that keep statistics (Lady Nelson, Millicent, Penola, Robe, Naracoorte, Tailem Bend) plus visitors to Signal Point on the Fleurieu Peninsula. This VIC has been added to the group for analysis due to the significance of Goolwa as an entry point to the Coorong for cruise vessels.

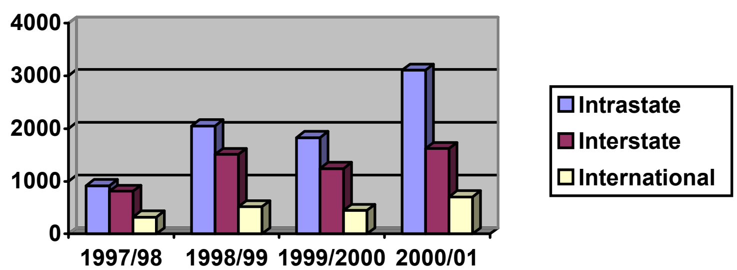
The VIC at Tailem Bend in Figure 2 represents a comparison against the rest of the Limestone Coast. This is the only VIC that is within the geographical boundary of the CDCA that keeps statistics that can be analysed. Their figures are consistent with those across the Limestone Coast, and except for the year 1999/2000 where an anomaly occurred, provide an accurate picture as to the breakdown of visitors to the region. Ideally, this would be better if more statistics were kept with other VIC's within the CDCA to ensure the profile was correct. However, it can be assumed due to the similarities of regional and local VIC profiles, that the visitor profile for the CDCA would be similar to that of the Limestone Coast region.

[6] Source: SATC Limestone Coast (South East) Tourism Profile 2001
[7] Source: SATC Limestone Coast (South East) Tourism Profile 2001

Limestone Coast VIC Profiles - Figure 1



Tailem Bend VIC Profiles - Figure 2



Transport SA indicates the following average daily traffic flows through the CDCA.[8] This indicates that the Dukes Highway has the highest traffic flow followed by the Princes Highway and then the Mallee Highway.

Whilst there is a certain degree of traffic flow centred around major townships on the highways as they 'draw' locals, the statistics do give an overall pattern for traffic movement within the CDCA. The statistics have only been recorded for major arterial roads within the CDCA and are listed following.

	From	To		To		To	
Dukes Highway	Tailem Bend	Mallee Highway turnoff	3000	Coonalpyn	4100	Keith	3800
Mallee Highway	Tailem Bend	Mallee Highway turnoff	3000	Jabuk	600		
Princes Highway	Tailem Bend	Meningie	1100	Salt Creek	2600	Kingston	1000

[8] Source: Transport SA Average Daily Traffic Flow Estimates, February 2001

5.1.2 Murraylands Tourism Region

In the calendar year 2001, visitor statistics from the National Visitor Survey (NVS) indicate that there were 391,000 overnight domestic visitors to the Murraylands region, 63,000 from interstate and 328,00 from South Australia[9]. In the year 1999/2000, 8,000 international visitors visited the region.

Of these visitors, South Australians stayed 768,000 nights, interstate visitors stayed 247,000 nights and international visitors stayed 17,000 nights.

The visitor profile of domestic visitors to the Murraylands region in 2000/2001 was as follows:

- 70% of overnight visitors stayed in the region for 1 – 2 nights, while 30% stayed 3 nights or more;
- 58% of domestic visitors were visiting for holiday purposes, 22% were visiting friends or relatives while 16% were travelling for business or a conference;
- 12% of domestic visitor nights were spent in a hotel/motel, 34% stayed with friends or relatives, while 14% stayed in a caravan park/camping ground.[10]

5.1.3 Fleurieu Peninsula Tourism Region

In many ways, consumers see the Fleurieu Peninsula as the 'Gateway' to the Coorong due to the access by vessels to the Coorong area and the commercialisation of these operators.

South Australian residents took approximately 2,325,000 day trips in the Fleurieu Peninsula in 2000/2001, the highest number of any South Australian region other than Adelaide.[11]

Visitor statistics in the calendar year to the end of 2001 show there were 602,000 overnight domestic visitors, 533,000 from South Australia and 69,000 from interstate. South Australian visitors stayed 1,308,000 nights and interstate visitors stayed 239,000 nights for the calendar year 2001.[12]

There were 13,000 visitors from overseas in the region in 1999/2000 and they stayed 52,000 nights.[13]

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[9] Source: National Visitor Survey – December 2001
[10] Source: SATC Murraylands Regional Tourism Profile, 2001
[11] Source: SATC Fleurieu Peninsula Regional Tourism Profile 2001
[12] Source: National Visitor Survey – December 2001
[13] Source: SATC Fleurieu Peninsula Regional Tourism Profile 2001

Total expenditure by domestic overnight visitors on Fleurieu Peninsula in 1998 was $90 million, whilst day trip expenditure was $81 million.

The visitor profile of domestic visitors to the Fleurieu in 2000/2001 was as follows:

- 64% of overnight visitors stayed in the region for 1 – 2 nights;
- 76% of domestic visitors were visiting for holiday purposes, 16% were visiting friends while 7% were travelling for business or a conference;
- 11% of domestic visitor nights were spent in a hotel/motel, 21% were in a caravan park or camping ground, while 28% were spent in the home of a friend or relative.[14]

5.2 Geographic Market Segmentation

One way to identify the market is through geographic market characteristics. These divide visitors into those travelling from the local area within the state (intrastate), those travelling from interstate to South Australia and those who visit SA from overseas. Statistics for these segments are detailed in the following sub headings.

5.2.1 The Intrastate Market

In the twelve months to December 2001, travellers within South Australia made 3,674,000 visits. This represents 7.1% of those travelling within their own state, nationally.

In visitor nights, the intrastate markets were responsible for 10,912,000 visitor nights to the end of December 2001. This represents 6.6% of visitor nights nationally. There were 11.2 million same day trips taken in the year to the end of 2001, which was associated with $795 million of expenditure.[15]

As previously discussed in the Limestone Coast, Fleurieu Peninsula and Murraylands profiles, South Australians represent the largest market segment for the respective regions. For the Limestone Coast, the distribution of intrastate and interstate visitors is almost the same number. This does represent a variation from the other two regions and can be explained due to its close proximity to the South Australian-Victorian border.

It can be reasonably assumed that the profile to the CDCA within the Limestone Coast region and between the Fleurieu and Murraylands is a combination of both largely South Australian visitors, followed by slightly less visitors from interstate.

[14] Source: SATC Fleurieu Peninsula Regional Tourism Profile 2001
[15] Source: National Visitor Survey – December 2001

5.2.2 The Interstate Market

The NVS states that during the twelve months to December 2001 the interstate market accounted for 1,855,000 visitors travelling to South Australia. This represented 8.2% of the national total of interstate travellers. Of these, Victoria and New South Wales are the state's most important providing approximately 40% of interstate visitors.

The interstate visitors stayed in South Australia for a total of 8,596,000 visitor nights which is representative of 6.9% of interstate visitor nights nationally.[16]

As previously discussed, these visitors are likely to be less in volume than the local South Australian intrastate market. However, due to the proximity of the CDCA in relation to the two major cities, it can be assumed that most road traffic flowing between Victoria and Adelaide will travel through the CDCA via one of the major arterial roads.

5.2.3 The International Market

In the twelve months to June 2000, South Australia experienced a record 350,100 international tourists according to the Bureau of Tourism Research (BTR) and International Visitors Survey (IVS). This also stated that Europe (including the UK) is South Australia's biggest market providing over half of those travelling.

The international market is the smallest by volume of those regions examined via profile. This statewide pattern is also consistent with the three regions examined. The primary markets for South Australia in this geographic segment are the UK, European (German, Dutch, Swiss, French, Spanish, Austrian) the US, Japanese and other Asian (Singapore, Malaysia) markets.

5.3 Roy Morgan VAL Psychographic Segmentation

Marketers continually strive to develop new ways of identifying existing and potential markets. Generally these are developed following analysis of some key historical characteristics such as age and geographic break down. Another way is the use of psychographic profiling.

Segmentation undertaken by Roy Morgan includes the analysis and breakdown of the total market into ten 'psychographic' or lifestyle/value segments. This form of segmentation is the differentiation of the tourist market on the basis of psychological and motivational characteristics such as personality, motivations and needs. The twelve segments are summarised in 'Appendix A'

[16] Source: National Visitor Survey – December 2001

5.4 BDA Profiles – Behavioural Holiday Typology Segmentation

The SATC has recently purchased a set of segmentation tools that are based upon travel patterns and behaviour. Previous tools such as Roy Morgan value segmentation are psychographic in nature and look at more general attitudes and values. Consequently, certain assumptions using psychographics are made with travel specific behaviour. The behavioural segmentation is broken into eleven segments that then can be applied according to different travel patterns of visitors. These are summarised in 'Appendix B'.

5.5 Experiential Market Segmentation

There are a number of specific, niche experiences that are available to tourists within the CDCA. Some of these experiences are recognised as being sought by a wide range and increasing number of tourists. Consequently, a number of studies have been commissioned to further examine the niches and identify trends, patterns and behaviours of those tourists seeking these experiences. These segments are discussed in more details within the context of this section.

5.5.1 Nature Based Tourism

There is an increasing emphasis being placed on nature based tourism by tourism bodies seeking to gain a competitive edge and utilise their natural assets in a sustainable manner. The International Year of Ecotourism will also provide more stimuli for interest in this specific field, particularly for the Coorong area.

The South Australian Tourism Commission has developed the following definition of nature based tourism for their nature based tourism strategy for South Australia

> *Nature based tourism is any sustainable tourism activity or experience that relates to the natural environment. Within this broad context there are a range of interdependent niche or specialist areas, such as ecotourism, cultural tourism and aboriginal tourism.*

The nature tourism background research profile undertaken by the Strategic Services unit of the South Australian Tourism Commission indicates a number of key statistics in relation to this market segment from an international visitor perspective:

- 45% of international visitors to Australia identify nature-related experiences as affecting their choice of travel;
- Activity wise, 'seeing natural wonders' and 'experiencing wildlife' have the strongest appeal for these visitors;

- For holiday purpose visitors, wildlife/nature was the thing most enjoyed about their trip to Australia and 23% identified nature/wildlife as one of the things they enjoyed;
- Almost 2 million international visitors participated in a National Park visit/bush walk while in Australia in 1999;
- Almost 50% of international arrivals participated in visiting a National Park or bush walking;
- 77% of German, 68% of Other European, and 63% of UK had the highest level of participation in visiting National Parks or bush walking;
- These markets account for over 55% of visits to South Australia in 1998;
- Almost 70% of international visitors to South Australia in 1998 participated in visiting National Parks or bush walking[*];
- Organised guided tours accounted for 61% of those who participated in nature-based activities;
- Of those participating in nature-based tours, 50% were for a full day and only 16% were overnight or longer;
- The backpacker or budget traveller has a particularly high level of participation in nature-based activities with 83% visiting National Parks or bush walking.[17]
- Those international visitors who participated in nature based activity can be clustered into three segments based on their motivations:
    - The dedicated nature based tourism segment that places highest importance on the education/learning experience and participating in physical activities (50% of the nature-based market). They are relatively young (20-34 years) but also with over 67% of all nature-based visitors over 50 years are in this segment as well. There is a relatively high share from the UK or Scandinavia;
    - The general interest nature based tourism segment that places want to see and experience something new and be close to nature and learning (35% of the nature-based market). There is a relatively high proportion of New Zealanders;
    - The escape nature based tourism segment that places a high importance on opportunities to escape tourism masses

[*] This figure indicates the activity that was undertaken at some stage during the visitors' Australian itinerary, not necessarily whilst staying in SA
[17] Source: Bureau of Tourism Research (BTR), International Visitor Survey, 1998

to rest and relax (15% of the nature-based market). There is a relatively high proportion of other Europe, Asia and North America;

Even though the statistics previously discussed state that almost 70% percent of visitors travelling to South Australia visited a National Park or went bush walking, much of this activity occurred in other states whilst part of the visitors' Australian itinerary.

However, it should be noted that only 23% of international tourists visiting South Australia in 1996 visited a National Park whilst here. The majority of these visits can be attributed to visiting Kangaroo Island and the Flinders Ranges. Accordingly, in 1999 the International Visitors Survey (IVS) indicated there was an annual increase in 8% for international visitors visiting Kangaroo Island. Similarly, there was an annual increase of 3% for international visitors visiting the Flinders Ranges.

It should be noted that in the majority of cases, an international visitor's interest in nature will be combined with an interest in other features, such as beaches, heritage, wineries, meeting locals and active adventure.

On a domestic basis the 2000 National Visitor Survey (NVS) represents a change in data collection where the data on visiting national parks and bush walking were collected separately as separate activities.

The main data indicated the following:

- The 2000 NVS indicated that 6% of all overnight domestic trips included visiting national parks;
- 8% of all overnight domestic trips in the same survey included bush walking;
- In 2000, 12% of all domestic trips included at least one of the activities (bush walking or visiting national parks);
- For South Australia, nearly 290,000 overnight domestic visits visit a national/state park and over 410,000 bush walk;[18]
- Whilst 22% of those visitors whose purpose included leisure/relaxation/getting away visited national parks or bush walked, 27% of those whose purpose was holiday participated in visiting a national park or bush walking;
- For South Australia, approximately 6% of visitors who travelled for the purpose of holiday/leisure/VFR, visited national parks and 10% bush walked. This somewhat lower than other states.

[18] Source: Bureau of Tourism Research (BTR) National Visitor Survey (NVS) 2000

- Those holiday/leisure purpose visitors travelling with children have the highest likelihood of visiting national parks or bush walking with approximately 25% participating. Those travelling alone are least likely with 14%;
- Those staying in caravan parks or camping at either commercial or non-commercial grounds along with those using guest house/bed & breakfast accommodation or self-catering accommodation have the highest propensity to visit national parks or bush walk.
- Those staying for three nights or longer and have children are also the most likely to visit national parks or bush walk.[19]

The Nature Tourism Background Research report also stated that the strongest associations with nature product (despite the strength and diversity of the product, recognition of South Australia's nature product is low compared to other states) are focussed on the Kangaroo Island and Flinders Ranges areas. This is consistent for both domestic and international markets.

According to the report, there is some awareness of the Outback and Coorong as nature attractions of South Australia. However, there is poor knowledge of exactly what the Coorong involves and how it can be experienced.

Given the quality of national park and bush walking experiences in South Australia, there is scope to boost participation in both interstate and intrastate markets. It should also be noted that the recent international focus has been on the areas of Kangaroo Island and the Flinders Ranges. The International Year of Ecotourism along with the synergy and product offered by the Coorong provide great prospects to expand and capitalise on the promotional opportunities within the CDCA.

Domestically, participation in bush walking or visiting national parks occurred primarily within the regions of Kangaroo Island, Flinders Ranges and the Far North, which reflects the major assets with that region. This does represent an opportunity to increase domestic visitation to parks within the CDCA.

In relation to value segments, the highest level of participation in visiting national parks on holidays of 3 or more nights is by the Visible Achiever and Socially Aware value segments. Other groups also have high levels of participation in visiting national parks or bush walking except for the Fairer deal and Look at Me value segments.

[19] Source: BTR NVS 1999

The holiday typologies of those on the 'Grand Tour', 'Big Tour' and to some degree 'Beach Holiday' type trips show above average levels of participation in visiting national parks and bush walking on their trip.

There is a poor perception and awareness of nature tourism in South Australia to both domestic and international tourists. To reach potential, it has been identified in the SATC's Nature Based paper that further product development and strong promotion of South Australia's nature based product is required.

5.5.2 Fishing and Coastal Tourism

The SATC has undertaken a number of reports on fishing tourism and coastal tourism in relation to South Australia and utilising the natural assets. The Fishing Tourism and Coastal Tourism Background Research Profile in December 1999 and the draft South Australia Coastal and Marine Tourism Strategy revised in August 2001 differentiate between the two activities. For the purpose of the report the fishing tourism and coastal tourism are defined as follows:

> *Fishing tourism is recreational fishing undertaken on a trip away from home for which fishing is a reason for the trip or contributes to the enjoyment of the trip.*
>
> *Coastal tourism can be considered to be trips for which the coast and/or coastal activities and attractions are a reason for the trip or choice of destination.*[20]

The SATC research profile indicates that international visitor's participation in fishing in Australia is low. Only around 4% of international visitors to Australia participate in fishing during their stay. The major group of those that will fish in this segment are aged between 15-24 years and are backpackers.

In contrast, those wanting to fish from the domestic market are higher with 9% of all domestic visits in Australia including the activity. For South Australia, the number is higher with 11% participating in the activity. Intrastate visitors are more inclined to fish than interstate visitors. The areas most sought for this experience include Kangaroo Island, Eyre Peninsula and the Lower Murray.

In relation to value segments, the Something Better and Fairer Deal segments are likely to pursue fishing. It should be noted that these two segments have a lower than average propensity to travel and are relatively small groups.

The SATC research profile indicates that coastal tourism is a highly sought activity. In the international market approximately 56% international visitors to Australia go to a beach at some stage while they are in Australia. Participation in

[20] Source: SATC Fishing Tourism and Coastal Tourism – A Research Profile 1999

activities such as swimming/diving/surfing and snorkelling/scuba diving are also highly sought activities with 28% and 12% participation rates respectively.

For South Australia, approximately 38% of international visitors to South Australia visit Adelaide beaches. Younger people such as backpackers from primarily the UK and other Europe have the highest levels of participation. This also includes activities such as swimming/diving/surfing and snorkelling/scuba diving. The perception of Australia having great beaches is well communicated overseas to these markets. However, this is defined as Australian product rather than South Australian key products.

In 1999, 24% of all domestic visits nationally included going to the beach as part of the activities and 52% of all holiday purpose trips included a visit to the beach.

For South Australia, 21% of interstate/intrastate visits included going to the beach as an activity but participation is greater for intrastate visitors as opposed to the interstate travellers. The areas most sought for this experience include Kangaroo Island, Fleurieu Peninsula and the Yorke Peninsula.

The key characteristics of domestic coastal tourists include that they:

- Travel as the purpose for holiday;
- Are younger in age group particularly 15-24 years;
- Likely to be young singles or those with young children living at home;
- Prefer longer stay rather than shorter stay.

The beach holidays with activities such as swimming, fishing and outdoor activities appeal to the Conventional Family Life and Visible Achiever groups in the Value segments. Coastal tourism that provides physical, adventurous and high energy activities can be expected to have the strongest appeal to the Young Optimist and Look at Me segments.

Another consideration for water based activities outside those discussed above is that of recreational boating. The report 'A Recreational Boating Development Plan – Lower Murray, Murray Lakes, Coorong' describes the recreational boater as fair weather boaters as opposed to professional mariners. They are drawn to the Coorong area due to the sheltered inland waterways and the all weather access available from Adelaide and the Fleurieu Peninsula. The combination of these factors with the abundant fauna in the area provides significant appeal for this traveler.

These reports all suggest that the area within the Coorong District Council are under utilised for these activities and that product specific marketing and infrastructure development can be undertaken to capitalise on the areas natural assets.

5.5.3 Bushwalking

Like the other areas so far discussed in this report, the SATC has developed a report specifically on bush walking. The Bushwalking and Tourism Background Research Paper prepared by the SATC in 1997 largely confirms previous data collected and analysed in the nature based section of this paper.

Both on an international and domestic basis, around a third of travellers indicate that bushwalking is one of the two activities which they would be most interested in participating if on holiday.

As previously identified the Europeans and the North Americans are most likely to participate in this activity. Over half the visitors from Switzerland, Austria, Germany and Scandinavia bushwalked during their stay in Australia.

The Coorong National Park visitors survey indicated that 34% of visitors undertook walking as an activity. This is comparable to the figure of 33% of international visitors undertook bushwalking whilst in South Australia compared to 13% of international visitors to Australia.[21]

The report also states that approximately 20% of visitors to South Australian country regions participate in bushwalking during their stay. At the time of the report, of those domestic visitors who had undertaken a holiday in the last twelve months, 17% indicated that had participated in bushwalking. Furthermore, a higher proportion of Adelaide residents participates in bushwalking.

Also consistent with the findings in nature based tourism, the domestic visitors participating in this activity are more likely to come from a higher socio-economic category in terms of education and occupation. Translated into value segments, the Socially Aware, Visible Achievers and Young Optimists showed the highest levels of participation in bushwalking. In regard to Traveller Typology, they are most likely to be among the Grand Tourer, Big Tourer and Beach Tourer.

5.5.4 Birdwatching

One of the significant features of the Coorong is identification as a RAMSAR site. In essence this means that the site is considered to be of key interest to dedicated birdwatchers due to the bird rich site and the amount and diversity of species.

Australia has over 800 bird species and this includes over 330 endemic species (birds that can be seen nowhere else). South Australia has over 400 birds and is considered to be best placed to experience mallee birds and arid zone birds but has only two endemic varieties. A key advantage South Australia has in this

[21] Source: BTR IVS 1994

market is the wide range of species that can reliably be seen in good numbers. This includes the Coorong and Mallee park areas within the CDCA.

Birdwatching tourists range from the dedicated ornithologists to those with a nature focus for which birds enhance the nature tourism experience. Internationally they are most likely to be middle class, urbanised people and come from North America, Europe and to an increasing degree, Japan. If visiting Australia, they are most likely to want to see as wide a variety of species as possible. This will mean that they will travel to many sites.

They are most likely to be from older age groups, couples or empty nesters and be within the Socially Aware and Young Optimist psychographic segments. They are most likely to be relatively affluent, generally interested in other wildlife, strong users of the internet and have a strong learning motivation.

Birdwatching Tourists are well informed through networks and will travel to see as many species in bird rich environments as possible. By Traveller Typology, they are most likely to be found among the Short Tourer, Holiday House and Big Tourer segments.

5.5.5 Indigenous Tourism

The CDCA offers a diverse range of experiences. One such experience is Indigenous tourism and the area is rich in assets. Research shows that in 1999, over 5% of international visitors participated in visiting an Aboriginal site/community at some stage during their stay in Australia. The highest propensity (7%) to take part in this activity is from those whose main reason for travel was holiday. This compares with 2% of those whose main purpose of visit was visiting friends and relatives.

11% of international visitors in the same period participated in or experienced Aboriginal art/craft and cultural displays at some stage during their stay in Australia. The most prominent group to participate in this activity is those whose purpose for travel was holidaying. The highest levels of participation by country of residence were Germany, other Europe and North America[22].

For South Australia, 7% of all international visitors indicated that they visited Aboriginal culture/attractions while in South Australia. The highest level of participation in this activity in 1998 was by those whose purpose of visit was holiday. 13% of visitors to South Australia from Germany visited Aboriginal culture attractions, as did 9% of those from both UK and USA and 8% of those from other Europe.

[22] Source: BTR IVS 1999

5.5.6 Cultural, Heritage and Arts Tourism

Definition of cultural tourism varies according to the use of research. Some include a focus on the travellers' experiences, goals or activities whilst others are more succinct relating to cultural attractions. Generally speaking though, cultural tourism can be described as:

> *Authentic experiences that which assist in creating and building on a unique cultural identity. These should enrich, educate and entertain visitors giving an understanding of our lifestyles and values.*

It is also described as embracing the full range of experiences visitors can undertake to learn what makes a destination distinctive – its lifestyle, its heritage, its arts, its people – and the business of providing and interpreting that culture to visitors.[23]

Heritage and Cultural experiences provide a substantial amount of experiences for the overnight tourist. In 1998 from NVS figures, 14% of all domestic overnight visits included participation in at least one art, heritage or cultural activity.[24] On a South Australian level, 14% of Victorian visitors and 9% of New South Wales visitors attended a cultural venue whilst staying in SA. However overall, 251,000 (or 5%) of domestic visits in South Australia included a visit to museums or art galleries. 359,000 (or 7%) of domestic visits included visiting historical or heritage buildings, sites and monuments.

Internationally, of the estimated 1.2 million inbound visitors who participated in at least one cultural activity during their stay, 31% of cultural tourists from overseas visited a historic buildings and monuments and sites. 27% visited museums and art galleries whilst 15% visited aboriginal sites and cultural displays.

In relation to the Roy Morgan value segments, the Socially Aware, Traditional Family Life and Visible Achiever segments are the most likely to participate in Cultural tourism. 18% of Socially Aware are likely to visit historical places with 15% of Visible Achievers and 19% of Traditional Family Life also likely to visit.

Likewise, 15% of Socially Aware are likely to visit Art Galleries with 11% of Visible Achievers and Traditional Family Life also likely to spend time visiting Art Galleries whilst travelling.

5.5.7 Educational Market

For the purpose of this project, the educational market is broadly defined as those in educational institutions whether it is primary, secondary or tertiary

[23] Source: SATC Cultural, Heritage and Arts Tourism February 2000
[24] Source: SATC Cultural, Heritage and Arts Tourism February 2000

educational providers. Whilst statistically, the figures of schools (all schools) has not altered much, it provides an idea of the size of the potential market.

The Australian Bureau of Statistics (ABS) states that there are approximately 820 schools in South Australia of which 571 are primary, 100 are secondary and 126 are both primary and secondary. There are 23 special schools. These schools add up to a total student number of approximately 250,000. Approximately 160,000 of these are in secondary school with the remaining 90,000 in primary school.

On a National basis, the ABS states that there are over 1,885,400 students in primary schools, 1,341,300 students in secondary schools for a combined total of 3,226,700 students attending schools in all years at over 9,600 different schools.

5.5.7.1 Primary School Education Market

The local primary school education market is a market that has a high propensity to travel to the CDCA in the pursuit of recreational areas and educational programs. The structure of the education system in South Australia enables curriculum to be developed independently for junior, middle and upper primary levels of students within primary schools according to areas of interest. For this reason, individual schools find they can structure some science and geography class formats according to the criteria in the South Australian Curriculum Standards document that includes visiting the CDCA. Most of this activity is located around the Coorong National Park area of the region.

5.5.7.2 Secondary School Education Market

Secondary schools also are actively involved in recreational and educational programs. Whilst no specific data is available, it would be expected that this group be made up primarily from school groups where more generic subjects such as outdoor education, geography and biology are encouraged. Environmental and Indigenous issues, along with personal development appear to be the focus in this age bracket.

Like primary schools, a curriculum guideline is developed that schools need to use as a framework for course development. The individual schools can select areas of interest within these parameters. These would provide the most likelihood of individual course structure being adjusted to incorporate the areas of the CDCA. Again, most of the activity is located around the Coorong National Park region.

5.5.7.3 Tertiary Education Market

The tertiary market is a specialist field and whilst they may have some relevance to the CDCA (particularly the Coorong) it would appear that these groups are minor in number compared to the primary and secondary fields. Consequently, it would be suggested that tertiary market is a specialised market niche and less activity should be undertaken promoting to them.

5.6 Regional Branding/Market Position

Market position is the creation of an image that, in turn, influences how people perceive the service provided whether it be in terms of the destination or location of the service, a business, or the service offered. Positioning is very closely related to points of differentiation and must be reinforced consistently at every opportunity to the market place.

As has been identified in this paper, there are a number of key assets that make the CDCA unique. These need to be capitalised upon in the way they are communicated to the market.

The SATC has undertaken a study on ‘Regional Branding’ to capitalise on tourism trends noted across other countries that demonstrate an increasing focus and application of destination branding to aid development and marketing. Specifically the SATC sought to determine awareness, appeal and image of South Australian tourism regions, determine key market segments and examine the consumer decision-making process.

Whilst this report was completed in April 2001 and examines the branding of the ‘South East’ a number of key features still can be extrapolated. It was identified that the main associations with the region were the ‘great beaches and coastline’, ‘spectacular scenery’, ‘nature and wildlife’, ‘fishing’, ‘caravan and camping’, ‘historic towns and buildings’ and ‘ecologically significant’.

All of the previous characteristics rated as above average association with the region. However, it should be noted that these associations are for the whole South East tourism region (now Limestone Coast) and not the sub regional area of the Coorong District Council zone. Nevertheless, strong linkages can be derived from these associations that are relevant for stakeholders within this project.

Behavioural patterns of this group indicate that they are most likely to travel in their own car or own 4WD and prefer staying in motels, on-site van/cabins or in their own caravan, tent or cabin. The age group is least likely to be in the 25 to 34 age bracket with general appeal being consistent with most other age ranges. They are likely to receive information about the region through family or friends, travel articles in newspapers or television programs, state tourism authority or motoring organisation.

There is a high appeal of the South East by Victorian residents, but limited knowledge. The previously mentioned characteristics and associations are also consistent with both South Australian and Victorian residents.

These behavioural patterns are consistent with the typology groups of support the Short, Big and Grand 'Tourer' groups as well as the Beach Holiday segment.

Significantly, the SATC has also undertaken an audit on one of the key assets within the CDCA, namely the Coorong National Park. This report identifies and positions the Coorong as:

> *The Coorong region is a pristine, unspoilt natural environment combining world standard birdwatching opportunities, aboriginal culture and heritage and coastal activities with access to a coastal city offering a complete range of tourism amenities ad support services.*[25]

The positioning of the Coorong is based upon the previously identified strengths and weakness combined with the assets and activities and the perceptions of these by visitors.

5.7 Tourism Trends

Tourism trends indicate growth in tourism. Whilst the tragedies like the terrorist attacks on September 11th and the demise of Ansett in the same week will and have caused a short term decline in inbound tourism. The number is still expected to increase consistently over the next 8 years. In fact it is estimated that international visitor arrivals will increase at an annual growth rate of 6.6% from 4.9 million in 2000 to 9.4 million visitors in 2010. The major growth is expected to occur with Europe and other Asia who are projected to increase at an annual rate of over 7%.

Domestically, it is projected that the total visitor nights will grow at an annual rate of 1.4% from 293.4 million to 338.8 million over the forecast period to 2010. For the same period, domestic visitor nights in hotels/motels and guesthouses are expected to grow by an average annual rate of 2.4% from 71.3 million to 90.5 million. This figure includes an average annual growth rate of 3.1% for those travelling for business purposes, whilst those travelling for the purpose of holidays or Visiting Friends or Relatives will experience an average annual growth rate 1.2% and 1.3% respectively.[26]

[25] Source: SATC Coorong National Park Situation Audit 2002
[26] Source: Tourism Forecasting Council, Forecast October 2001

These forecasts are consistent with the growth of tourism in South Australia. International visitation to the year ending June 2000 was up by 12% to 350,100 and visitor nights for this market was up by 14% to 5,089,000 nights. Since June in 1995, the overall annual growth rate for international visitors has been 6% and visitor nights 10%.

Domestically, the interstate market is seen as travelling through a cyclical pattern (recovery, levelling, decline). Over the period 1994/95 to 1998 the annual growth rate was 6% for visitors and nights. However after a recent flat period, statistics for the year ending September 2001 indicated visitors from interstate was down 1% to 1,922,000 and visitor nights was down 16% to 8,607,000.

The same trend is reflected in the intrastate market. Over the period 1994/95 to 1998, the average annual growth rate in intrastate visitors was 1% and nights 2%. The most recent statistics for the year ending September 2001 indicated intrastate visitors fell by 5% to 3,597,000 and intrastate nights remained unchanged at 10,838,000.[27]

Whilst these statistics represent South Australia, relevance can be drawn and applied to the Limestone Coast Region and the CDCA. The domestic interstate and intrastate markets remain primary markets for the CDCA. Growth trends in selected international markets are also identified.

Other trends that affect the CDCA, is the increasing demand for nature-based experiences by international tourists. Such demand can be demonstrated by the increasing numbers and demand for product such as Wayward Bus that provides these experiences whilst travelling between Adelaide and Melbourne with the Backpacker market. The SATC also reflects a change in direction recognising the burgeoning opportunities to capitalise on the resources provided in South Australia by marketing more of areas like the Coorong as opposed to the traditional areas of the Flinders Ranges/Outback and Kangaroo Island.

In the SATC's draft State Tourism Plan, it is identified that key drivers in the future will be 'community based tourism', the environmental issues will influence the destination of choice and tourism needs to be managed in a sustainable manner. These trends enable operators within the CDCA to capitalise on the natural assets at their disposal within their local region.

Further, they state (amongst others) that concentration will focus on the state's unique attributes, will respect and enhance biodiversity, natural environment and heritage. The vision is:

[27] Source: SATC South Australian Tourism Indicators 2002

By 2007, South Australia will be the domestic market's first choice for memorable wine and food, special event, nature-based and coastal and marine experiences, particularly for the self-drive touring holidays…..

To achieve this vision, a series of goals and objectives have been devised to optimise the likelihood of achievement. The goals and objectives that are particularly relevant to operators within the CDCA are:

- Embracing the state's rich natural assets
- Developing integrated coastal experiences
- Enhancing the Murray River experience
- Strengthen Aboriginal tourism
- Promotion of special interest (niche) markets
- Targeting the Most Profitable (domestic) Prospects
- Marketing South Australia as an outstanding 'drive' experience
- Applying a collaborative approach to marketing

The future from a state marketing perspective is to focus on the journey rather than the destination. Consequently, there are ramifications for the CDCA as operators can be an integral part of the 'journey'.

Each of these goals and objectives have been devised considering the real and potential trends in the market place. The changes identified and recognised in the market place are opportunities for operators within the CDCA to recognise and capitalise upon. Key to any further growth is a clear identification of the target market.

5.8 Target Markets/Customer profile

Following analysis of the different forms of segmentation, the target markets deemed as a priority are described within this section. The South Australian Tourism Commission identifies the major markets for the Coorong on their Situation Audit of 2002 as:

- Domestic touring markets with a focus on coastal activities – particularly those travelling down the Great Ocean Road and extending their journey into South Australia.
- International visitors with an interest in an eco and indigenous tourism experience linked with quality accommodation and tourism infrastructure (both Victor Harbor and Adelaide)
- Backpackers due to the combination of access, wildlife and Indigenous culture
- Dedicated birdwatchers

- 4WD enthusiasts
- Education groups

Whilst the previously mentioned target markets are relevant to the Coorong National Park area, the CDCA because of its diversity attracts a wider range of visitors. These can be divided by a number of characteristics:

Geographically:
It has been strongly identified through anecdotal evidence that has been supported by the SATC that Adelaide is a primary domestic market for the area. There is also a significant number of New South Wales and Victorian visitors touring through the region. This refers specifically to those from Western Victoria, Melbourne and Sydney.

Some market development could also occur to a lesser degree in South Eastern Queensland and country South Australia as these represent growing opportunities.

By Sheer volume, the international markets are less significant than the domestic markets that visit the area. However, internationally the primary markets are UK, Europe (western Europe including Germany, Switzerland and Austria) and to a lesser degree the French and Italian markets. Whilst volume-wise this group is less significant than domestic markets, international visitors do have a high propensity to travel and experience nature based tourism.

A growing market opportunity is capitalising on the popularity of the Coastal route with self-drive families from Singapore and to a lesser extent Malaysia. This market can currently be seen driving hire cars along the coastal route from Melbourne to Adelaide via the Fleurieu and Kangaroo Island.

Given the predicted growth trends of an annual rate of 6.6% and predicted demands from the European and Asian markets, energies applied into marketing to these markets would very appropriate.

Psychographic:
The Roy Morgan Value segments clearly display a propensity for travel and desire to visit the CDCA in the Visible Achiever, Socially Aware and Traditional Family Life segment. To a lesser degree, the Look at Me and Young Optimism segments may also be drawn to the area. These are discussed in more detail earlier in the report.

Specifically the Traditional Family Life are characterised by being low to middle income and education and are 50+ years – mostly empty nesters or older families. The Visible Achievers are characterised with the proof of having made it up the seemingly never-ending social ladder and are aged between 35-54 years old. The Socially aware whilst also covered in detail in Appendix A can be identified as being the speciality of public servants, pressure groups, business analysts and politicians of all political colours and are aged between 35-54.

The look at Me segment is associated with active, unsophisticated, somewhat self-centred and peer-driven behaviour that sees success as a kind of game and not to be measured by family standards. They are younger singles in the age range of 18-24 years old. Whilst the Young Optimism segment is associated with young professionals, technocrats and students whose thoughts are focused on achieving a good career, overseas travel and generally improving their prospects in life, having a sense of fulfilment and a chance to enjoy an outgoing lifestyle. This group are aged between 25-34 years old.

Behaviour:
The BDA Profiling that has recently been purchased by the South Australian Tourism Commission indicates that the Grand Tourer, Big Tourer, Short Tourers, Country Escape and Beach Tours are the most likely markets for the CDCA.

These profiles are detailed previously in this report but Grand Tourers are more likely to use their own car or have a campervan and stay in a Caravan Park or camping area. They are an older group with over half retired. They have an interest in nature, historical interpretation and moderate indulgence. They can be on the road for an extended period averaging 51 nights away.

Big Tourers drive their own car and are more likely to use commercial accommodation such as motels, B&B and luxury 4 & 5 star hotels being away on average for 13 nights. They have an interest in wines, gardens, history and nature.

Short Tourers are also likely to travel in hire cars or bus/coaches and attend special events and historical attractions. Country Escape are the budget-conscious family groups taking the kids away for a short break, but includes young affluents.

5.9 Tourism Linkages

The South Australian Tourism Commission (SATC) has detailed a number of priorities to be undertaken that have a direct bearing on the CDCA. Although the SATC has recognised that the CDCA falls into the Limestone Coast Tourism Region for marketing purposes, they identify key assets as the Coorong National Park, Lakes Albert and Alexandrina and the Murray Mouth area. The unique natural features and their significance of Indigenous heritage and culture are key differentiators of tourism product and provide opportunities for growth through the provision of nature based experiences with the prolific bird life and flora and fauna.[28]

Future priorities also include:

- Domestic tourism the development of one or more sustainable nature retreats and visitor facilities within the Coorong;
- Development of nature walking trails within the Mallee region's conservation parks;
- The promotion of nature based developments that address the river, wetlands or conservation parks;
- The improvement of visitor facilities, interpretation, signage within conservation parks and the Coorong
- The provision of opportunities to experience the diverse wildlife and bird life associated with the wetlands of the area;
- Provision of opportunities to access and experience indigenous cultures in association with local indigenous people

As previously discussed in 'Tourism Trends', the SATC is a major partner and can provide significant marketing linkages with operators within the CDCA due to the major focus on the CDCA's major markets through the creation of drive programs. The Major drive routes will strongly feature the Dukes and Princes Highways under the Food and Wine and Coastal themes respectively.

Due to this market initiative (and also to existing programs) there are natural links with the Fleurieu and Murraylands regions as to the similar markets that both areas attract. Particularly in relation to the self-drive market that travels along the coastal route. This is to be more formalised with a new drive strategy by the SATC later in the year. A number of routes will be developed for the large self-drive tourism market (of which the CDCA is a stakeholder) that will be launched in September. One such route will incorporate a Coastal drive that will impact on the CDCA whilst other drives developed around themes of food and wine and also Murray River will affect other areas of the CDCA.

Future directions within the Fleurieu region include the development of links in wine, nature based and coastal tourism, development of a coastal trail by extending current infrastructure and improving walking trails and signage throughout the region.

The neighbouring Murraylands region also identify the promotion of their area for tourism as a priority by linking tourism and regional marketing with lifestyle advantages, regional product and service promotion.[29]

[28] Source: SATC Muraylands Tourism Profile 2001

The Coorong District Council itself has set priorities to foster development whilst ensuring the natural environment is preserved and to promote the Council area as an attractive place of natural beauty to visit. They also recognise the need to increase the level of infrastructure and list this as a major priority with the development of roads and transport access. The Council recognises the benefits of tourism and list the intrastate, interstate and international visitors to the area as key performance indicators in their strategic plan for the Council area.[30]

Transport SA recognise the volume of traffic entering the area and in partnership with Limestone Coast Tourism have developed brochures to encourage visitors to stop along the Dukes Highway at a series of locations. This is aimed at reducing driver fatalities through fatigue and represent opportunities for local traffic to capitalise on passing trade.

National Parks are also a big partner in the CDCA. They have control of one of the areas greatest resource – the Coorong. They actively market to the local and interstate visitors to the area as well as provide management of the CDCA's natural resources. Given the recognition of the importance of the natural assets with the CDCA, links with National Parks is a vital component with any tourism activity.

[29] Source: Murraylands Regional Development Board, Murraylands Region Strategic Plan 2000 -2003
[30] Source: Coorong District Council Strategic Plan 2001 -2006

6.0 Tourism Issues for Coorong District Council

Whilst the parameters of this project have been very specific, a number of issues have been identified during the consultation process with stakeholders that need to be communicated to form a platform for positive, sustainable growth.

These encompass a number of areas and are identified in this section along with other relevant opportunities that operators can capitalise upon in the tourism market.

6.1 Identified Gaps

Through desktop audit and consultation with major stakeholders, a number of gaps have been identified in the provision of product. These are explored within this section and can provide specific objectives or opportunities for stakeholders. These gaps have been identified following analysis of the market place.

Whilst there has been positive Indigenous development within the CDCA, there appears to be further demand for more quality interpretive Aboriginal developments with the region. There is a specific demand for this in the growing international market, specifically with backpackers and those from UK and German speaking countries. Emphasis is placed on 'authentic' aboriginal experiences.

There appears to be a lack of self guided walking opportunities within the Coorong National Park. The expansion of existing walking trails would benefit bush walking and other special interest groups who travel to the region. Opportunities in the specific ecotourism market can be expanded upon by some existing operators incorporating conservational and educational components on a range of tours to satisfy the demand in the market place. This is particularly the case for international travellers and the Visible Achiever and Socially Aware segments that support nature based experiences.

There was significant concern regarding the provision of service by non-tourism operators. These are considered part of the 'second-tier' of the tourism industry but nonetheless, still an active and vital part of service provision to visitors. It was considered that basic customer service skills, their understanding of how they 'fit into the big picture' and the impact they can have on the visitors needed to be developed to provide a complete tourism package for the CDCA. Whilst not within the scope of this report, it has been identified as an issue for further development to provide a 'total tourism package' for the region.

It was also identified that there was a need for the provision of a range of eating places beyond those currently on offer. This would provide future packaging opportunities for transport and accommodation providers but also facilitate longer stays in the area and increased expenditure. Again, this point was identified though not part of the scope of the study. It is assumed that an increase in critical mass to the area will support the development and evolvement of this service through market forces.

The make up of Visitor Information Centres within the CDCA is critical as they provide information to visitors regarding the local areas. Currently there is no accredited Visitor Information Centre within the area to provide consistent, professional advice to visitors. In each of the cases, despite good support from volunteers, an accredited information centre is required with the main purpose of providing information to visitors as opposed to a secondary activity. Provision of a major VIC outlet in the region then needs to be supported by adequate training on customer service and relevant product knowledge. This issue will need to be addressed by Council.

There is a range of budget and ‘lower- rated’ accommodation within the CDCA. Given the market breakdown, this is quite appropriate. It does however mean that there is a ‘gap’ in the provision of superior and moderate accommodation. Demand for this particular type of accommodation can be displayed by the number of visitors utilising access to the Coorong via the waterways and the wide range of accommodation on the Fleurieu Peninsula.

Signage was perceived as a gap for visitors also. Both in regard to signage providing information for visitors on products/attractions available as well as directional signage. Given the planned drive trails, this should be assessed as a priority by Council.

Recreation facilities including toilets, picnic areas with seats and grassed areas, particularly along major arterial roads were seen as an area for development. Such facilities would encourage visitors to pause, take more time in the region and encourage an increase in expenditure. Like signage, an increase in traffic will place extra pressure on infrastructure facilities. This will also need to be addressed by Council.

Communication was seen as an area of deficiency, despite good feedback about the role of Limestone Coast Tourism. This was particularly in relation to the regional dissemination of ‘events’ or ‘happenings’ within Limestone Coast Tourism and the ability for operators to pass on information to the ‘Mount Gambier’ end and vice versa. An increase in collaboration will encourage more efficient use of information and resources by operators.

Most operators saw the benefit of being associated with Limestone Coast Tourism and wanted to feel ‘more included’ in activities rather than ‘isolated’. This may be the perception by operators as opportunities are available for involvement if they choose. However, there was a feeling that these activities were located to one area rather than an even geographical spread.

The relationship of operators through linkages in a practical sense also was an area for improvement. Limited opportunities to communicate as a group of operators to Limestone Coast both formally and informally, and vice versa were perceived to be available. If this were to increase, opportunities to disseminate information, facilitate involvement and to create a sense of unification would be the most likely result.

7.0 Marketing Action Plan

The following marketing action plan is derived to provide operators within the CDCA with avenues for marketing activities. Some of these activities require financial contribution by operators, whilst others are fully subsidised.

Colours have been used to assist in the identification of marketing activities. Blue highlighted text identifies activities that are compulsorily undertaken by Limestone Coast Tourism in conjunction with the SATC. Red highlighted text is those activities that are currently undertaken by the Limestone Coast independently. Black text represents other activities that can be undertaken.

Some of the activities that are listed, identify where advertising and other monetary support can be undertaken, where as other activities are representative of opportunities to be involved through in-kind support.

In each case, the operator can choose the appropriate activity to be involved with applied to the specific target market that they have identified as their customers.

It is essential that operators identify opportunities to participate in conjunction with the larger regional and state marketing bodies to support these agencies in the marketing of the region and capitalise on the opportunities in the market place.

Whilst operators are geographically within the Limestone Coast tourism region, some may find it advantageous to link with other surrounding regions. This will be dependent on the market that is targeted by the operator.

Objective: To increase communication, collaboration and professionalism of operators within the Coorong District Council Area.

Strategies

- Establish collaborative relationships with other agencies and/or operators
- Develop relationships with key industry partners such as the SATC and neighbouring Fleurieu and Murraylands regions
- Develop formal and informal networks of communicating within the CDCA and Limestone Coast Tourism Region
- Develop a culture that facilitates learning and customer service excellence across the Coorong District Council Area.
- Encourage increased professionalism for operators in the CDCA

Action	Who	Budget Allocation	Target Markets
1. Expand the 'Coorong Operators Group" (COG) to include all operators within the CDCA	SATC /LCT	TBC	N/a
2. Invite a representative from the Coorong Operators Group (COG) to join the Limestone Coast Board	LCT	N/a	N/a
3. Invite a representative from the Coorong Operators Group (COG) to join the Limestone Coast Marketing Committee	LCT	N/a	N/a
4. Visit SATC public relations staff to familiarise them with product	OPS	N/a	Appropriate markets
5. Develop package links with other operators that have synergy (i.e. cruise provider with tour guide etc.)	OPS	N/a	Appropriate markets
6. In collaboration with local trade, develop promotions to include value additions (i.e. discount off entry & vice versa or free ice cream with every tour etc.)	OPS	$200	Appropriate markets
7. Attractions to conduct regular 'sales calls' on local accommodation houses promoting product	OPS	N/a	Visiting markets in regions
8. Join Limestone Coast Tourism, Fleurieu Tourism, Murraylands Tourism according to target markets and appropriate linkages	OPS	$250	N/a
9. Undertake Tourism Industry Accreditation Program	OPS	$125+	N/a
10. Attend Limestone Coast Tourism meetings to identify ways to	OPS	N/a	N/a

link products with other areas of the region 11. Develop workshops for increasing skill base of tourism operators in the CDCA including customer service & networking.	LCT	Additional funds	N/a

Objective: To increase the profile and visitation by the intrastate market to the Coorong District Council Area through promotional activities.

Strategies

- Participate in cooperative marketing activities through membership of appropriate region (Limestone Coast, Fleurieu or Murraylands)
- Participate in the development of destination specific promotional opportunities
- Increase profile of the Coorong District Council Area to the Adelaide market through promotional activities
- Develop specific awareness of the Coorong through brand related marketing initiatives
- Increase awareness of the Coorong District Council Area to special niche interest groups including bushwalkers, nature based tourists, fishermen, 4WD and birdwatchers

Action	Who	Budget Allocation	Target Markets
1. Through membership with Limestone Coast or appropriate region participate in: *a. Full page advertisement in the Royal Auto Winter Escapes supplement* *b. Support specific publications* *c. Participate in Adelaide Holiday and Travel Show.* *d. Participate in Adelaide Caravan and Camping Show.* *e. Support the 5AA Radio campaign.* *f. Support Postcards – Channel Nine* *g. Support Discover – Channel Seven*	SATC /LCT “ “ “ “ “ “ “	TBC)))) $2,000) $2.000) $5,000) including) SATC) coop activities	All targeted SA intrastate markets
2. Participate in twelve month destination television campaign with COG, SATC, Limestone Coast Tourism, Fleurieu Tourism	LCT OPS	TBC	SA Intrastate markets
3. Develop drive trails around the themes of coastal touring, food & wine and the River Murray	SATC	SATC funded	SA intrastate markets

Objective: To increase visitation by the interstate market to the Coorong District Council Area through promotional activities.

Strategies

- Participate in cooperative marketing activities through membership of appropriate region (Limestone Coast, Fleurieu or Murraylands)
- Participate in the development of destination specific promotional opportunities that link across states and regions
- Increase visitation by the self drive market through promotion to key self drive markets
- Promote and develop the 'Coorong' brand name through marketing activities
- Promote 4WD experiences and key nature based opportunities to primary interstate markets in Victoria and New South Wales

Action	Who	Budget Allocation	Target Markets
1. Through membership with Limestone Coast or appropriate region participate in:	SATC /LCT /OPS		
a. *Melbourne 4WD and Fishing Show*		$2,000	Melbourne & South Western Victoria
b. *Melbourne Caravan and Camping Show.*		$2,000	
c. *Perth Caravan & Camping Show*		) Total of) $31,000	Perth
d. *Sydney Caravan & Camping Show*		) for	Sydney/NSW
e. *Sydney 4WD Show*		) participation) at remaining	
f. *Brisbane Caravan & Camping Show*		) shows	Brisbane/QLD
2. Through membership with Limestone Coast support:			
a. A twelve-month television campaign throughout Western Victoria (network/s yet to be confirmed) including production of a COORONG destination ad.	LCT	$70,000	)) Melbourne &) South
b. Participation at Geelong Travel Show		$3,000	
c. Victorian Media and Trade Familiarisation		$26,000	) Western Victoria
d. Two State campaign		$5,000	)
e. Volcanic Trail campaign.		$2,000	)
3. Develop drive trails around the themes of coastal touring, food	SATC	SATC Funded	Melbourne/South

& wine and the River Murray			Western Victoria Sydney/country NSW
4. Develop indigenous and walking trails as part of the environmental trail concept to support drive trails created by SATC	LCT	Additional funding	Melbourne/South Western Victoria Sydney/country NSW

Objective: To increase visitation by the international market to the Coorong District Council Area.

Strategies

- Participate in cooperative marketing activities through membership of appropriate region (Limestone Coast, Fleurieu or Murraylands)
- Participate in the development of destination specific promotional opportunities
- Utilise the Limestone Coast and Coorong brand name to promote recognition of the region
- Develop specific promotional activities for the Backpacker market
- Utilise the unique themes of the region in promotional activities including indigenous activities, birdwatching and bush walking
- Promote the Coorong area to international travellers in Australia through VIC outlets and consumer markets

Action	Who	Budget Allocation	Target Markets
1. Through membership with Limestone Coast support:			
a. Participation in the Asian market, in particular the emerging self-drive market.	LCT	$3,000	Self drive Asian
b. The production of a Melbourne to Adelaide backpackers guide.	LCT	$2,000	Backpacker – distribute through hostels
c. Conduct International Media and trade famils in partnership with the South Australian Tourism Commission and Australian Tourism Commission.	LCT	$4,000	Key International
d. Produce International Media information kits and distribute to South Australian Tourism Commission preferred media outlets.	LCT	(budget included in domestic) $4,000	Key international
2. Through collaboration with other operators attend ITB to promote key experiences	OPS	OPS own budget	UK/ European
3. Through collaboration with other operators attend ATE to promote key experiences	OPS	“	UK/ European
4. Operators to form contacts with key inbound operators	OPS	Ops Own budget	Key international

Objective: To ensure maximum utilisation of the Coorong region through exposure using promotional collateral

Strategies

- Capitalise upon natural assets within the region in promotional collateral
- Develop brand awareness through marketing collateral
- Encourage increased visitation by promotion of key assets within the Coorong District Council Area
- Encourage longer stays and 'stopovers' in the Coorong District Council Area

Action	Who	Budget Allocation	Target Markets
1. Develop product brochure for own business	OPS	OPS own cost	Varying according to market
2. Through membership with Limestone Coast or appropriate region participate in			
a. The Limestone Coast Visitor Guide b. Limestone Coast motivational guide. c. Produce a Limestone Coast 4/5-minute promotional video.	LCT " "	$120,000 $20,000 $8,000	Varying according to market
d. Support the production of; i. A Limestone Coast Environmental Trail brochure ii. A Limestone Coast Fishing Guide iii. A Limestone Coast 4WD Map and Brochure iv. A Limestone Coast History Trail Guide	LCT	)) Total of) $16,000) plus) operators) contribution)	Self drive Nature based Domestic – fishing Domestic – heritage
e. Develop website linkages to the Limestone Coast regional site	OPS	Own cost	Varying markets
f. Develop Coorong.com to include tourism focussed activities to be included and linked to other key sites. i.e. SATC, Limestone Coast tourism. Focus to be on the destination.	COG	Own cost	Varying markets
3. Participate in the 'Tattler'	OPS	NPWS/ Ops own cost	Self drive market Domestic & international
4. Advertise on the Coorong Map	LCT/ OPS	LCT/ Ops own cost	Self drive market Domestic & international

8.0 Appendices

8.1 Appendix A – Roy Morgan Value Segments

Basic Needs – This segment is usually associated with older people who are retired, pensioners or people on social security payments who have an active community focus to their lives, and with people on sickness benefits or workers compensation who have to reduce their expectations in line with reduced income.

It represents 4% of the adult population and they tend to stay with friends or relatives rather than commercial accommodation. This group tends to read suburban newspapers and watch such things as the Midday Show and has a low propensity to travel. When they do travel they have the lowest expenditure.

A Fairer Deal - This segment is generally found amongst unskilled and semi-skilled workers who left school to start learning from friends who share blue denim values. They are more likely to experience unemployment, family pressures, and the feeling of getting a raw deal out of life and demographically they are around 30 years of age.

This group represents just over 6% of the adult population and tends to stay with friends or relatives or go camping. This group has a high level of television consumption watching shows such as Ricki Lake and the Simpsons. They have a low propensity to travel and when they do they don’t spend much.

Traditional Family Life - This pattern of thinking personifies middle-ageing Australia - homeowners with relatively stable incomes that meet the needs of the smaller household. Energies revolve around the ideal of becoming grandparents or getting children to come home for visits or at least to keep in touch. They are low to middle income and education and are 50+ years – mostly empty nesters or older families. Health and spirituality dominates a sense of meaning and purpose in life and being well respected in the community is very important.

This group represents almost 20% of the adult population and will stay in reliable and comfortable accommodation. They like sightseeing and history and local food and wine. They tend not to want a nature experience or luxury. They watch Burkes Backyard and read Women’s Weekly and Women’s Day. They have an average propensity to travel with average holiday expenditure, prefer longer trips, are keen tourers and like visiting friends and relatives.

Conventional Family Life - This pattern of thinking is most closely associated with suburban families devoting all their time and efforts to building a "home" to give their children the opportunities they deserve, striving to improve their home, enjoying family life and having enough time to keep in touch with their parents and friends.

This segment represents almost 11% of the adult population and stay in rented holiday accommodation, sticking to a budget when on holidays. They read suburban newspapers, Women's Weekly and Women's Day. They have a low propensity for interstate travel but will travel intrastate.

Look at Me - This segment is associated with active, unsophisticated, somewhat self-centred and peer-driven behaviour that sees success as a kind of game and not to be measured by family standards. They are younger singles in the age range of 18-24 years old. This is the pattern of the "decibel generation" that lives in McDonalds, drinks Pepsi, burns up money (their own and their parents'), spends hours watching commercial TV and can't wait to be somewhere else.

This group is almost 13% of the adult population and will stay with friends, in hostels, tents and holiday homes. They read Who and Cleo and watch music based programs such as Rage. They have an average propensity to travel but are more likely to travel intrastate.

Something Better - This group is associated with people who are very competitive, seeking to clinch a bigger, better deal that will develop a little bit more to help pay off an excessive mortgage on the new family home. They have extensive debts and a strong preference for more power, improved status and security. The group tends to be younger couples and have children.

The group represents 8% of the population will stay in all commercial and non-commercial accommodation when they can afford it. They read magazines that are practical and watch Funniest Home Videos. They have an average propensity to travel interstate with average holiday expenditure.

Real Conservatism - This pattern of thinking is associated with people who are mature and mid-career, holding conservative social, moral and ethical values, and seeking a disciplined, ordered society that is safe and predictable. There is a strong tendency towards authoritarian, blue chip, business-oriented preferences that offer security and the feeling of being very much in control. This is a common pattern in rural settings.

They represent just over 4% of the adult population and tend to stay in motels and other rented accommodation. They read Sunday and suburban newspapers and watch shows like Sixty Minutes and Burkes Backyard. They have an average propensity to travel interstate but spend little on holiday travel.

Young Optimism - This segment is associated with young professionals, technocrats and students whose thoughts are focused on achieving a good career, overseas travel and generally improving their prospects in life, having a sense of fulfilment and a chance to enjoy an outgoing lifestyle. It is generally more prevalent in inner city and urban lifestyle settings. This group are aged between 25-34 years old.

This group represents 7% of the adult population and trend to stay in a wide range of accommodation. They like nature based experiences, cultural tourism and food and wine. They read media such as Who, Rolling Stone and Elle. They will watch Seinfeld and documentaries. They have a high propensity for interstate travel.

Visible Achievement - This group is associated with the proof of having made it up the seemingly never-ending social ladder and are aged between 35-54 years old. Personal recognition, higher incomes, job satisfaction and other tangible rewards of success such as travel, recreation and high quality homes, vehicles and holiday locations provide the very best of visible good living.

They represent almost 15% of the adult population and will stay in luxury hotels, rented accommodation or standard hotels/motels. They enjoy wineries, historical places, restaurants and the beach. They read media such as House and Garden and watch the ABC News and current affairs. They have a high propensity for interstate holidays with high spending patterns but prefer shorter trips of a week or less.

Socially Aware - This usually associated with the highest socio-economic group in the community. This segment is the speciality of public servants, pressure groups, business analysts and politicians of all political colours and are aged between 35-54. These "insatiable information vacuum cleaners" are addicted to finding out or trying anything that's new or different and persuading others to accept their opinions, priorities and lifestyle preferences.

They represent just over 11% of the adult population and like to stay in luxury hotels, rented accommodation B&B's but also tents. They enjoy short break holidays and will explore nature food and wine and ecotourism. They respond to media such as Time and watch ABC/SBS News but have a low TV consumption.

8.2 Appendix B – BDA Holiday Typology Segmentation

Grand Tourers – this group represent 5% if the interstate holiday market and 12% in value. They are more likely to use their own car or have a campervan and stay in a Caravan Park or camping area. They are an older group with over half retired. They have an interest in nature, historical interpretation and moderate indulgence. They can be on the road for an extended period averaging 51 nights away.

They are flexible in the construction of their itinerary and likely to gather information about the holiday from a motoring organisation or guidebook and brochures. They are also considered to be members of the Real Conservatism and Traditional Family Life Roy Morgan Values segments.

Big Tourers – this group represent 17% of the Interstate holiday market and 22% by value. They are generally travellers in their mid life stage with no dependent children. They drive their own car and more likely to use commercial accommodation such as motels, B&B and luxury 4 & 5 star hotels being away on average for 13 nights. They have an interest in wines, gardens, history and nature.

They are likely to receive information from a travel agent, brochure, travel guide or a motoring organisation. They are also considered to belong to the Visible Achievement, Socially Aware, Young Optimism and Real Conservatism Roy Morgan Value segments.

Country Escape – budget-conscious family groups taking the kids away for a short break, but includes young affluents. Many stay with friends, at motels or self-catering units. They represent 3% of South Australian travellers and generally travel within school holidays and weekends. They have an average of 3 nights away.

Short Tourers – these represent 8% of the interstate market by volume and 7% by value. They use a variety of accommodation styles but favour hotels and motels. They are also likely to travel in hire cars or bus/coaches and attend special events and historical attractions.

They are more likely to obtain holiday information from travel agents, the Internet or state tourism authority. They are also likely to belong to the Visible Achiever, Socially Aware or Look at Me Roy Morgan Value Segments.

Beach Holiday – lower socio-economic families and young couples, moving along the regional coast in their own car, hire car or campervan. They stay in self-catering cabins, motels. They are interested in bushwalking, shopping and visiting wineries. They can be away for over two weeks and represent 5% of South Australian travel, generally travelling within school holidays.

Weekend Away – this group are a group that ‘Get away for the weekend’. This group enjoy relaxing, wining, dining and socialising. They stay in B&B accommodation, hotels and motels. They are, as the name suggests, likely travelling over the weekend period and may be based in Adelaide or part of the conference market.

The Holiday House – this group is divided into two sub groups. The first being a very up-market group with high disposable income, using their own holiday “shack” and the second being from a lower socio-economic group, renting a holiday unit. As their behaviour suggests, they are committed to a specific location (due to the immovable establishment) generally due to the assets that the area possesses. They tend to stray in one area for up to a month and will visit national parks, historic places, museums, parks, wineries whilst enjoying wildlife and scenery. They generally come from an older age bracket and have can have teenaged children.

Visiting Friends or Relatives – travel for the purpose of visiting friends or relatives and stay for up to two weeks. They are interested in Cinema and have a diverse socio-economic group.

City Lights – are short tourers staying for up to four nights. They like cultural adventure, museums, history, cinema and come from affluent families or groups with some younger couples.

Fly and Stay – stay for an average duration of nine nights. They enjoy food and wine, shopping, casinos and theme parks. The group is made up of lower empty nesters, aged couples and affluent middle class.

Special Events – this group travel in groups of six or more and stay in hostels, hotels or motels. This group is generally mad up of mature solos, affluent families and empty nesters..

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