TOURISM STRATEGIC PLAN 2019-2023

EarthCheck

CITY OF ONKAPARINGA
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EXECUTIVE SUMMARY

By 2023, 1.6 million visitors could be injecting $300 million a year into Onkaparinga’s economy, up from 1.2 million visitors spending $210 million in 2017/18. The City of Onkaparinga together with the local tourism industry have identified opportunities to create this growth.

Tourism has become an important part of Onkaparinga’s economy, attracting over 1.2 million visitors, generating $210 million in visitor expenditure in 2017/18 and providing 2485 local jobs across 1,033 tourism businesses. The sector significantly contributes to the City of Onkaparinga’s Community Plan, Onkaparinga 2035, through people, place and prosperity and enables a strong, sustainable and vibrant city.

The City of Onkaparinga strategic tourism plan 2019-23 positions the tourism sector as a key economic driver for the local economy.

Onkaparinga (City) is uniquely positioned in South Australia, where the coast meets the vines and is the gateway to the Fleurieu Peninsula region. Home to the internationally renowned McLaren Vale Wine Region and 31 kilometres of pristine beaches and rugged coastline, the City offers seaside and historic villages and an impressive food culture emanating from the first farmers market in South Australia (Willunga Farmers Market), with restaurants and cafes presenting paddock to plate inspired menus - all within 40 minutes of Adelaide.

The d’Arenberg Cube has created a game-changing experience for the City, with other significant tourism developments including Mitolo and Beresford, elevating the tourism profile and inspiring future tourism opportunities including accommodation.

The City’s tourism attractions, experiences and townships are important contributors in establishing a prosperous, diverse and competitive economy and play an active role in Onkaparinga being an attractive place to live, do business as well as visit. The City’s strengths of food and wine, aquatic and nature, arts and culture, as well as events have driven an enviable increase in tourism over the past five years, however, there is untapped tourism potential. There are significant opportunities to improve the tourism marketing of the City, add depth to the range of visitor experiences, and work together more effectively across the City to maximise visitation and spend.

The vision is to work with Onkaparinga’s connected and engaged tourism industry to enable Onkaparinga to become South Australia’s most visited destination outside of Adelaide, delivering $300 million in visitor expenditure by 2023, creating a prosperous, diverse and competitive economy.

Through implementing the plan, the City of Onkaparinga aims to increase visitor expenditure to a total of $300 million in 2023. This is to be achieved by increasing day visitation and expenditure, as well as securing a greater share of overnight visitors to South Australia.

The vision will be delivered by focusing activities on a series of strategic pillars:

1) Leadership, Partnerships and Co-ordination
2) Marketing
3) Experience Development and Capacity Building
4) Place and Precinct
5) Visitor Servicing
6) Tourism Investment Attraction

The City of Onkaparinga strategic tourism plan 2019-23 is the outcome of research, analysis and industry consultation. The plan sets a new clear tourism direction for the City, identifies future potential growth and recognises the opportunity the City has to harness and manage the growth for the benefit of the community and visitors.

*City of Onkaparinga Local Government Area Profile, Tourism Research Australia.
OUR APPROACH

The City of Onkaparinga together with the local tourism industry have created the plan through research, economic modelling, consultation and workshops.

A whole-of-industry approach has been taken in preparing the strategic tourism plan, providing a framework which seeks to maximise return on investment. The following outlines the plans development phases.
Phase 1

Research
- Product and experience audit
- Policy and strategy review
- Visitor market review
- Economic assessment of the city

Phase 2

Consultation
- Consultation with internal teams across the organisation
- Workshop with Directors and Elected Members
- Workshop with the Economic Development Forum and industry
- Individual consultation with local, regional and state stakeholders
- One-to-one engagement with local tourism operators

Phase 3

Analysis
- Development of vision and objectives
- Preparation of an interim findings report

Phase 4

Draft Strategic Tourism Plan 2019-23
- Consultation and feedback
- Workshop with Directors and Elected Members

Phase 5

Final Strategic Tourism Plan 2019-23

The strategic tourism plan has been prepared and aligned with additional projects including:

Detailed local tourism destination audits
- In working with the city's Economic Development Forum, destination audits were undertaken across five identified tourism precincts including Aldinga, Christies Beach, McLaren Vale main street, Port Noarlunga and Willunga. The audits were undertaken to provide an independent assessment of each tourism precinct from a visitor perspective.

Tourism destination identity/brand
- Through the local tourism industry's and community's feedback, the tourism positioning of the City has been determined. It will convey its unique strengths to target markets, visitors and community and will be used in all future tourism marketing and promotion of the City.

Key outcomes and learnings from these initiatives have been incorporated in the preparation of the strategic tourism plan.
OUR TOURISM INDUSTRY

There are a range of stakeholders who are highly engaged and focussed on growing visitation and spend from Tourism Australia to local tourism operators.

It is important that the focus and direction of key stakeholders is understood to ensure opportunities are maximised. The City of Onkaparinga is committed to providing tourism leadership for the City and supporting tourism initiatives which align to the tourism plan, contributing $300 million visitor expenditure to the local economy by 2023.
Lead agency: Tourism Australia
- Other government agencies
- Other peak tourism associations

Lead agencies: South Australian Tourism Commission
- Tourism Industry Council South Australia
- Other government agencies

Lead agency: Fleurieu Peninsula Tourism
- Regional Development Australia
  - Adelaide
  - Adelaide Hills, Fleurieu and Kangaroo Island
- Southern Adelaide Economic Development Board
- Neighbouring local councils
- Other regional stakeholders

Lead agency: City of Onkaparinga
- Business and Tourism Associations
- Local tourism industry
National

- Tourism Australia

Tourism Australia undertook research with 90,000 respondents to better understand the influencing factors on consumers considering travel to Australia. In doing so they developed three key marketing pillars focussing on the following attractions and experiences:

- Aquatic and Coastal
- Food and Wine
- Youth

Tourism Australia and the South Australian Tourism Commission (SATC) partner on specific marketing campaigns which align to target markets and maximise reach and engagement. Two of the three marketing pillars strongly align to Onkaparinga’s tourism offering, together with the positioning of the Fleurieu Peninsula.

State

- South Australian Tourism Commission

The South Australian Tourism Commission (SATC) is the lead state based tourism marketing agency. Key focus areas for the state include:

- Intrastate/interstate marketing
- Asia markets
- Events
- Tourism Infrastructure Fund
- Regional Visitor Strategy Implementation

Whilst it is acknowledged international is where visitation growth will come from, the domestic market is vital.

Key international growth markets for South Australia include:

- Europe
- Asia
- North America
- New Zealand

Greater engagement is sought with SATC, particularly around co-operative marketing opportunities for further promotion of the region and Onkaparinga.
Regional

Fleurieu Peninsula Tourism

Fleurieu Peninsula Tourism (FPT) is the regional tourism organisation for the City of Onkaparinga and is primarily funded by the four Fleurieu councils of Alexandrina, Victor Harbor, Yankalilla, together with Onkaparinga.

Whilst it is acknowledged that FPT is the conduit of the SATC (as the Commission is unable to work with 62 councils across the state), FPT is significantly challenged in resourcing and funding as part of its delivery model. A greater partnership needs to occur between SATC and FPT, particularly from a marketing and promotional perspective.

Three key focus areas for FPT include:

• Delivering a unified ‘one voice’ for the region
• Connection, collaboration and communication
• Marketing

Local

City of Onkaparinga

The City’s strengths of food and wine, aquatic and nature, arts and culture, as well as events have driven an enviable increase in tourism over the past five years, however, there is untapped tourism potential.

For the City to increase its market share of visitors and remain a leading tourism destination for the state and Fleurieu Region, a focus will need to be placed upon marketing, experience development and capacity building, place and precinct enhancement, as well as tourism investment attraction. The ability to work together more effectively across the City, as well as collaboratively at regional and state levels offers the opportunity to maximise visitation and spend.

The rolling hills, the vineyards, the gorgeous coastline, the markets… I’ve done it all in one day. Imagine what you could do in a weekend!

Gary Mehigan – MasterChef Judge
ROLES AND RESPONSIBILITIES

The City of Onkaparinga’s tourism focus is to provide industry leadership, promote the destination and support the development of the local tourism industry to drive visitation growth, create jobs and generate economic prosperity.

To enable the City of Onkaparinga to maximise its tourism opportunities it is important that it establishes a clear understanding of its roles and responsibilities, as well as aligning, engaging and collaborating with other organisations/agencies as part of the broader tourism industry. The clarification of roles is fundamental to the successful delivery of the tourism vision and Onkaparinga 2035 vision.

The City of Onkaparinga’s role in tourism will focus upon:

- Industry leadership and advocacy
- Local destination marketing
- Event development/support
- Place and precinct (experience building)
- Visitor Servicing and digital wayfinding
- Experience/product development
- Business/workforce support
- Supporting tourism development (planning framework, investment friendly)
- Research/performance measurement
- Part-funding of Fleurieu Peninsula Tourism
### National

<table>
<thead>
<tr>
<th>Agency</th>
<th>Principle Roles</th>
<th>Council’s Engagement</th>
<th>Objectives / Benefits from Engagement</th>
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<tbody>
<tr>
<td>Tourism Australia (TA)</td>
<td>• International Marketing</td>
<td>• Engagement mainly via SATC and FPT</td>
<td>• Ensuring Onkaparinga’s premier tourism experiences are profiled by Tourism Australia</td>
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### State

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>South Australian Tourism Commission (SATC)</td>
<td>• Strategy and policy&lt;br&gt;• International/domestic marketing&lt;br&gt;• Support for tourism regions&lt;br&gt;• Research&lt;br&gt;• Support for major/ regional events&lt;br&gt;• Supporting industry capability</td>
<td>• Engagement with SATC mainly via FPT&lt;br&gt;• Industry events/ workshops&lt;br&gt;• Direct contact on specific issues – research, VICs etc</td>
<td>• Influencing State tourism policy initiatives&lt;br&gt;• Ensuring Onkaparinga’s tourism products and experiences feature prominently in SATC’s marketing, media and trade activities&lt;br&gt;• That Onkaparinga’s tourism businesses are fully aware of, and take up support and business opportunities provided by SATC</td>
</tr>
<tr>
<td>Tourism Industry Council South Australia (TICSA)</td>
<td>• Advocating for position tourism policy&lt;br&gt;• Tourism business training and networking&lt;br&gt;• SA Tourism Awards&lt;br&gt;• Tourism accreditation</td>
<td>• Workshops, industry events&lt;br&gt;• Direct communications where appropriate - VIC accreditation etc</td>
<td>• Contributing to policy positions&lt;br&gt;• That Onkaparinga’s tourism businesses are fully aware of, and take up support and business opportunities provided by SATIC</td>
</tr>
<tr>
<td>Agency</td>
<td>Principle Roles</td>
<td>Council’s Engagement</td>
<td>Objectives / Benefits from Engagement</td>
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| **Fleurieu Peninsula Tourism (FPT)**        | • Implementation of the Fleurieu Peninsula 2020 Tourism Strategy  
• Delivering a unified ‘one voice’ for the region  
• Connection, collaboration and communication  
• Marketing                                      | • Agreement of annual business plan  
• FPT Board member  
• Regular direct communication – meetings, workshops, e-communications  
• FPT is a member of the proposed tourism advisory committee | • Council obtains good value/measurable impact from its investment in FPT  
• Onkaparinga tourism products and experiences achieve an appropriate level of profile in regional marketing, trade and familiarisation initiatives  
• Onkaparinga’s tourism businesses are aware of, and take up support and business opportunities provided by FPT  
• FPT represents the City’s tourism interests in work programming and prioritisation initiatives with SATC |
| **Regional Development Australia (RDA)**    | • Facilitating economic development  
• Attracting investment  
• Supporting business development  
• Advocating for a prosperous tourism industry | • Partnering as a metropolitan council | • Awareness and access to program opportunities, partnering initiatives |
| **Southern Adelaide Economic Development Board (SAEDB)** | • Provide industry leadership to further develop the Southern Adelaide economy  
• Influence the decision-making of organisations and individuals which will have a positive impact on the future of the region  
• Promote the region as a location for business success | • Collaboration with the City of Marion | • Work as a region to maximise the visitor experience and position Southern Adelaide as the ‘destination of choice’ for domestic and international visitors |
| **Neighbouring local governments**           | • Destination management and marketing in their respective areas  
• Funding and supporting Fleurieu Peninsula Tourism | • Liaison to identify joint working and partnership opportunities, which respond to visitor demand and experience delivery | • New opportunities identified and established |
<table>
<thead>
<tr>
<th>Agency</th>
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<th>Council’s Engagement</th>
<th>Objectives / Benefits from Engagement</th>
</tr>
</thead>
</table>
| Tourism industry and business associations| • Investing in and delivering the visitor experience  
• Marketing  
• Representing member interests  
• Australian Tourism Data Warehouse (ATDW) listings | • Engagement via local associations/economic development forum  
• Regular one to one contact  
• ON Business Partner Program | • Supporting a healthy and prosperous tourism industry  
• Active engagement in the implementation of the tourism plan  
• Investment in tourism experiences  
• Seeking agreement on roles and responsibilities, especially marketing |
| Local tourism industry                   | • Deliver quality visitor experiences  
• Being local and regional ambassadors  
• ATDW listings and online presence | • Supporting business capacity/capability building through the ON Business Partner Program  
• Sharing research and information regarding council-led tourism initiatives  
• Cooperative marketing opportunities | • Supporting a healthy and prosperous tourism industry  
• Investment in tourism experiences  
• Active engagement in the implementation of the tourism plan |
NEW AND CHANGING MARKETS

The global nature of tourism continues to present new opportunities and emerging trends and have assisted in shaping Onkaparinga’s strategic tourism plan.

**Millennials will be 50% of spend by 2026**

Millennials currently spend more than $200 billion on travel annually and are typically aged between 22 and 37 years of age and value life experiences and social connection over traditional financial investments.

**Over a billion extra people will be travelling**

With aviation routes expanding and the rise of middle-class economies in a number of highly populated countries across the world, it has created new travel opportunities.

**Authenticity and unique experiences will grow in importance**

Given the volume of travellers and the creation of a time-poor lifestyle and fake news, leisure travel will become more highly influenced around authentic and unique experiences.

**Connectivity will be standard**

Whilst travelling internationally and domestically, consumer expectation is for Wi-Fi connectivity and easy access to private and public transport. Destinations who offer these options will continue to grow.
Sharing travel experiences on social media platforms

Instagram and Facebook are the most used social media platforms when sharing travel experiences and significantly influence friends and family travel preferences.

Sharing economy

The emergence of sharing economies like Airbnb and Uber will continue to develop. It forms part of experiencing the destination like a local and will continue to be embraced by consumers.

Food tourism will remain popular

When travelling for leisure or business, dining adds to the overall visitor experience, with elements of bragability appearing in social media posts.

Staycations

Where destinations are located in close proximity to home, the family dwelling will be used as a base to visit and explore new or favourite experiences.

Solo travel

The solo traveller is an emerging market, particularly through the youth and mature aged markets.
DESTINATION OVERVIEW

Onkaparinga is one of the most visited destinations outside of Adelaide. The combination of the internationally renowned McLaren Vale Wine Region, the pristine beaches and world-class visitor experiences is what makes the City unique and special.

The City of Onkaparinga is located on the southern fringe of the state’s capital city Adelaide, 40 minutes from the central business district as well as the international and domestic airport. The City captures approximately 6.5% of the state’s overall visitation and is the gateway to the Fleurieu Peninsula tourism region.

Home to some of the state’s most inspirational and recognisable tourism experiences, iconic local wineries d’Arenberg and Wirra Wirra have been invited to be part of Tourism Australia’s Ultimate Wine Experiences of Australia. The City is also featured in two of South Australia’s official touring routes, namely the Epicurean Way and Southern Ocean Drive.

The City is uniquely positioned in South Australia, where the coast meets the vines and offers some of the state’s best experiences in food and wine, aquatic and nature, arts and culture and events. Home to the McLaren Vale Wine Region and over 31 kilometres of pristine coastline, the City continues to attract national broadcasters with international audiences like Masterchef and Sunrise, as well as hosting the most picturesque and defining stage of the annual Tour Down Under cycling race.

Over the past five years, the City’s visitation and visitor spend has continued to grow sustainably, achieving an overall 79% increase in visitor expenditure. In 2013 the city attracted 1 million visitors who spent $117 million, with the city experiencing its highest visitation and expenditure in 2017/18 - 1.2 million visitors generating $210 million in visitor expenditure*. Domestic overnight visitors are primarily from intrastate (62%). Approximately 15% of interstate visitors originate from Victoria, with a further 11% from New South Wales*.

The top three international visitor markets for the city are the United Kingdom (33%), USA (9%) and New Zealand (7.5%). It is also recognised that South Australia is experiencing significant visitation growth from markets such as China, Indonesia, India and other Asia and there is potential to attract additional visitation from these markets, as part of their visit to Adelaide.

The primary purpose of day visits to Onkaparinga is holiday/leisure, followed by visiting friends and relatives (VFR) and business*. The large leisure and small business market is an important characteristic to note – being a driver for the highly seasonal nature of visitation patterns to the region. The domestic overnight and international visitors’ profile differ slightly from day visitation in that visiting friends and relatives are much higher than holiday/leisure visitation.

Given the City’s close proximity to Adelaide, it is a popular day trip destination. Over 81% of its visitors are day-trippers, with only 19% staying overnight (18% domestic and 1% international*). It is acknowledged that the high number of day visitors will continue, however there is opportunity to increase overnight visitation through experience development, packaging of commissionable product and promotion and new/improved accommodation offerings.

There is a new wave of innovative tourism development emerging within the City, with the iconic d’Arenberg Cube creating a game-changing tourism experience. It has shone a spotlight on the City and broader Fleurieu Region by gaining national and international attention, which increases the awareness of the City in domestic and international visitor markets. Other significant new tourism experiences include the Mitolo Tasting Room and Bocca di Lupo Restaurant, Beresford Tasting Pavilion and Beresford House, as well as Hotel California Road.

For the City to increase its market share of visitors and remain a leading tourism destination for the state and Fleurieu Region, a focus will need to be placed upon marketing, experience development and capacity building, place and precinct enhancement, as well as tourism investment attraction.

*City of Onkaparinga Local Government Area Profile, Tourism Research Australia.
1.2 million
Total visitors

$210 million
Visitor expenditure

Visitation

International overnight visitors 1%
Domestic day visitors 81%
Domestic overnight visitors 18%

Overnight visitation
Within South Australia 62%
Victoria 15%
New South Wales 11%

Top 3 international visitor markets
United Kingdom 33%
USA 9%
New Zealand 7.5%

Reasons to visit
Holiday/leisure 55%
Visiting friends and relatives 39%
Business 4.5%

*City of Onkaparinga Local Government Area Profile, Tourism Research Australia.
SWOT ANALYSIS

The uniqueness of the wine region and pristine coastline together with the diversity of experiences provide strong opportunities to increase visitation and visitor spend, however the region isn’t as connected as it could be.

Through consultation and engagement undertaken in developing the plan, the tourism identity/brand as well as the destination audits, it has provided valuable insights into the strengths, gaps, opportunities and challenges faced by the City, providing a strong foundation to progress new opportunities.

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tbody>
<tr>
<td>• Unique mix of coast and wine region</td>
<td>• Wine and coastal components of region are not as connected as they should be</td>
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<tr>
<td>• Good accessibility – proximity of Adelaide/Adelaide Airport</td>
<td>• Online presence and promotion is disjointed</td>
</tr>
<tr>
<td>• Variety of experiences on offer</td>
<td>• Seasonality in visitation</td>
</tr>
<tr>
<td>• Inclusion on regional/state touring routes</td>
<td>• Very high day visitor market</td>
</tr>
<tr>
<td>• McLaren Vale’s position as a premier wine region with wineries wine distribution profiling the region globally</td>
<td>• Limited nighttime visitor economy</td>
</tr>
<tr>
<td>• The wine region has a distinct authentic feel compared with the Barossa and other regions</td>
<td>• Limited public transport options and taxi services within the region</td>
</tr>
<tr>
<td>• High quality winery experiences</td>
<td>• Limited larger scale accommodation offer, especially in the wine region</td>
</tr>
<tr>
<td>• Quality local produce and long-standing food culture</td>
<td>• Inconsistent opening hours for establishments</td>
</tr>
<tr>
<td>• High quality beaches and coastal environment</td>
<td>• Inconsistencies in visual appeal of tourism townships, especially McLaren Vale</td>
</tr>
<tr>
<td>• Coastal walks and trails</td>
<td>• Underdeveloped coastline/limited activation for tourism experience</td>
</tr>
<tr>
<td>• Growing arts and cultural scene</td>
<td></td>
</tr>
<tr>
<td>• Walkability within townships</td>
<td></td>
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<tr>
<td>• Distinct village vibe/feel to townships</td>
<td></td>
</tr>
<tr>
<td>• History/heritage – of the wine region and areas such as Clarendon, Willunga</td>
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<tr>
<td>• Extensive cycle network/home to a stage of Tour Down Under</td>
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<tr>
<td>• Visitor Information Centre well located, providing opportunity to influence visitor behaviour</td>
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### Opportunities

- Improved tourism coordination and leadership and clarity in terms of roles and responsibilities
- New coordinated approach to tourism marketing
- Establish a branding approach which provides an umbrella for complementary regional experiences
- Leveraging the visitation generated by the Cube
- Packaging and cross promotion opportunities
- Activation of the coastline, providing additional spending opportunities and creating ‘reasons to visit’ including new precinct-based development
- Identifying nightlife and winter opportunities
- Cycling facilities and infrastructure
- Improved business and streetscape presentation in some tourism precincts
- New visitor accommodation options
- Experience led approach by SATC and Tourism Australia provides the opportunity to ensure the region grows its presence in marketing initiatives
- Growing depth and range of nature based experiences
- Grow cultural and arts events and experiences
- Rationalisation of signage within the region and transitioning to digital wayfinding
- Continuing to grow business capacity and skills

### Threats

- Failure to work as a coherent region will result in unfulfilled tourism potential
- Community opposition to growth/development at times
- Lack of awareness of some local business of the benefits of tourism activity
- Infrastructure in smaller townships not suitable to service increases in tourism
- State and local planning framework provides challenges for larger scale development around McLaren Vale and coastal nodes
POSITIONING

Inspired by the breathtaking landscape of coast and vines, the City owns a unique opportunity to position itself as Adelaide’s premier coastal, food and wine destination.

State and Regional Approach

Onkaparinga is part of the Fleurieu Peninsula tourism region, with the City’s tourism experiences represented under the regional Fleurieu brand in state-wide marketing initiatives. Nature-based and coastal assets dominate Fleurieu’s positioning with the City providing the focus for food and wine experiences.

The SATC is committed to the tourism regions as one of its key channels for developing and managing tourism across the state. In aligning with the approach championed by Tourism Australia, it takes an experience-led approach to marketing rather than the traditional destination-led approach.

Local Approach

A destination brand has been developed to clearly identify the tourism positioning of the City and convey its unique strengths to target markets, visitors and community. It was created in consultation with the local tourism industry as well as the community and will be used in all future tourism marketing and promotion of the City.

Following market testing, the City’s tourism brand is McLaren Vale and Fleurieu Coast. This connects and complements both brands of McLaren Vale and Fleurieu Peninsula and also represents the coastal aspects distinctly from the wine region.

In determining the tourism destination brand for the City, through the comprehensive engagement with industry and community, the following themes consistently emerged. Whilst the strongest and most consistent themes appear on the first line of the table, it is also important to understand and recognise additional strengths and themes which also support the identity and positioning of the City.

<table>
<thead>
<tr>
<th>Key words – What we are</th>
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<tbody>
<tr>
<td>Sea</td>
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<tr>
<td>Relaxed</td>
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<td>Close</td>
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McLAREN VALE AND FLEURIEU COAST

WINE
The world-class McLaren Vale Wine Region is known for premium Shiraz and ultra-premium Grenache and Cabernet. The wine region has over 80 boutique cellar doors, offering a range of tasting experiences and is a member of the Great Wine Capitals of the World Network, joining other wine regions like the Napa Valley and Bordeaux. There is also an emergence of craft brewing and distilling, with a number of new taphouses and distilleries to experience.

FOOD
Iconic food experiences are found across the City, which is home to South Australia’s first and favourite farmers market - the Willunga Farmers Market. It has driven a food culture inspired by local produce, delivering some of the state’s best dining experiences featuring paddock to plate menus amongst the vineyard, valley or from a coastal clifftop.
WINE – FOOD – COAST – VILLAGES

The only place in Australia where pristine beaches and unique villages are part of an internationally recognised wine and food region within 40 minutes of a capital city.

COAST

Home to a spectacular 31km stretch of coastline including pristine beaches presenting a range of aquatic experiences. Port Noarlunga and Aldinga are two of the most dived spots in South Australia, with the City also awarded Australia’s first regional surfing reserve – Mid Coast Surfing Reserve.

VILLAGES

The City is dotted with coastal and historic villages, each offering their own unique vibe. The relaxed coastal atmosphere at Port Noarlunga and Aldinga’s Old Coach Road, combined with the eclectic and vibrant village of Willunga and the picture-perfect township of Clarendon, provide an immersive local experience and a sense of discovery.
PORT NOARLUNGA
Strengths:
Coast, Village, Art, Food, Nature
ATDW listings: 8

ALDINGA
Strengths:
Food, Coast, Village
ATDW listings: 63

CHRISTIES BEACH
Strengths:
Coast, Village, Art
ATDW listings: 8

Port Noarlunga Reef

Encounter Marine Park

Aldinga Reef

Onkaparinga River National Park

ADELAIDE
IDENTIFIED TOURISM PRECINCTS

- Aldinga
- McLaren Vale
- Port Noarlunga
- Willunga

EMERGING TOURISM PRECINCTS

- Christies Beach
- Clarendon
- Old Reynella

CITY WIDE TOURISM PLAN PILLARS

- Marketing
- Experience Development and Capacity Building
- Visitor Servicing
- Tourism Investment Attraction
VISION AND OBJECTIVES

As the fastest growing economy in South Australia, tourism offers an economic opportunity to secure a prosperous and sustainable future for the City of Onkaparinga and its community.

Tourism Vision

Together, a connected and engaged local tourism industry enables Onkaparinga to become South Australia’s most visited destination outside of Adelaide, delivering $300 million visitor expenditure by 2023, creating a prosperous, diverse and competitive economy.
Strategic Directions

- Deliver effective collaboration and leadership for the tourism industry.
- Impactful destination positioning and promotion which grows destination awareness in target markets.
- Enable the development of additional and enhanced destination experiences, which build upon the brand and destination strengths, as well as the creation of new iconic experiences where supported by market demand.
- Initiate a tourism-led place/precinct building program which creates welcoming places to visit.
- Deliver innovative visitor servicing, destination management and digital wayfinding which connects the City for visitors, businesses and community.
- Create an investor-friendly climate to enable sustainable business development, investment and growth throughout the City.

Objectives

- Increase visitor expenditure to $300 million by 2023.
- Grow Onkaparinga’s annual market share of South Australia’s food and wine visitation from 14.6% to 15.6% by 2023.
- Grow Onkaparinga’s annual market share of South Australia’s coastal and aquatic visitation from 6.1% to 6.5% by 2023.
- Grow daily yield from day visitors by 8% above natural growth by 2023.
- Increase Onkaparinga’s annual market share of South Australia’s overnight visitor numbers
  - domestic from 3.5% to 3.9%
  - international from 2.7% to 3.0% by 2023
- Facilitate a less seasonal visitor economy, focusing on growing visitation in shoulder months and midweek periods.
- Enable development of an improved range of visitor experiences.
- Encourage a coherent and connected tourism industry across the City of Onkaparinga which contributes significantly to future prosperity of the region.
Tourism is vital to the City’s economy and it has the opportunity to increase visitor spend to $300 million by 2023. Whilst the City has experienced an increase in visitation and spend over the past five years, there is more to be done.

Through implementing the plan, the City of Onkaparinga aims to increase day visitation and expenditure, as well as securing a greater share of overnight visitors to South Australia.

The tourism vision will be delivered by focusing activities on a series of strategic pillars.

### 2017/18

**WHERE WE ARE NOW**

| Visitor expenditure | $210 million  
|                     | $575,000 per day  
| Employment          | 2,485 direct jobs  
| Tourism businesses  | 1,033  

### 2023

**WHERE DO WE WANT TO BE**

| Visitor expenditure | $300 million  
|                     | $820,000 per day  
| Employment          | 2,925 direct jobs  
| Tourism businesses  | 1,060  

*City of Onkaparinga Local Government Area Profile, Tourism Research Australia.*
LEADERSHIP, PARTNERSHIP AND COORDINATION

Create leadership, partnership and collaborative approaches that will act as key enablers to help connect a diverse and geographically dispersed industry.

**Strategic Direction:** Deliver effective collaboration and leadership for the tourism industry

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### Our opportunity: Leadership, Partnership and Coordination

<table>
<thead>
<tr>
<th>What we will do</th>
<th>How will we do it</th>
<th>What will we measure</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Prepare and implement a tourism partnership and engagement framework.</td>
<td>• Agree a new contract/service level agreement with Fleurieu Peninsula Tourism Agreement (3 year agreement currently concludes June 2019)</td>
<td>• Annual satisfaction benchmark derived from a stakeholder satisfaction survey</td>
</tr>
<tr>
<td>• Establish a tourism coordinating committee as the lead advisory body for tourism in the City (industry sector reps/community reps/council)</td>
<td>• Form an internal tourism coordination group (key internal stakeholders) – charged with implementation of strategy actions within council</td>
<td>• Fully operational and resourced tourism plan supported by an advisory committee that represents the tourism industry across the City</td>
</tr>
<tr>
<td>• Develop a citywide tourism research program, facilitating year-round data collection further supported by locational and spend technologies</td>
<td>• Form a memorandum of understanding with McLaren Vale Grape Wine &amp; Tourism Association (MVGW&amp;TA) which confirms tourism roles and responsibilities and identifies joint and individual opportunities</td>
<td>• Tourism is considered and integrated across departments</td>
</tr>
<tr>
<td></td>
<td>• Work with the Business and Tourism Associations to support the implementation of the tourism strategic roadmaps as identified and developed through the tourism audits</td>
<td>• Business Associations are actively involved in tourism</td>
</tr>
<tr>
<td></td>
<td>• Work with local, regional, state and national tourism organisations to support the growth of tourism, as per the partnership framework objectives</td>
<td>• Strategy remains relevant to visitor behaviours and industry needs</td>
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<tr>
<td></td>
<td>• Invest in a research program to inform decision-making;</td>
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<tr>
<td></td>
<td>• develop an overall visitor profile</td>
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<tr>
<td></td>
<td>• map the visitor journey pre, during and post stay</td>
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<tr>
<td></td>
<td>• monitor visitor activity and dispersal</td>
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<td>• monitor satisfaction with the destination and intention to return</td>
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</table>
MARKETING

Identify strategic marketing activities which encompass partnerships, reflect brand propositions and values, destination positioning and promotional initiatives.

**Strategic Direction:** Impactful destination positioning and promotion which grows destination awareness in target markets.

<table>
<thead>
<tr>
<th>Our opportunity: Marketing</th>
<th>What we will do</th>
<th>How will we do it</th>
<th>What will we measure</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>• Implementation of a new citywide tourism brand based on identified selling position and brand values, leading to the preparation of an annual marketing plan.</td>
<td>• Develop an annual marketing plan which includes targeted marketing campaigns to maximise visitation and overnight stays</td>
<td>• Onkaparinga’s annual market share of South Australia’s food and wine and coastal and aquatic visitation/visitor expenditure</td>
</tr>
<tr>
<td></td>
<td>• Defining roles and responsibilities for delivering local marketing among key stakeholders, leading to creation of an effective an efficient local marketing partnership.</td>
<td>• Establish strategic marketing relationships with neighbouring and ‘feeder’ destinations and regions</td>
<td>• Daily average yield from day visitors</td>
</tr>
<tr>
<td></td>
<td>• Work with local partners to rationalise investment in local tourism marketing, utilising the new tourism website as a shared resource by developing tourism precinct sub-sites, supported by business and tourism associations.</td>
<td>• Agree an annual business/action plan with Fleurieu Peninsula Tourism with the aim of ensuring Onkaparinga’s maximises exposure in state-wide, national and international marketing initiatives, and ensuring that the City’s wine and food, coastal and nature-based experiences are to the forefront</td>
<td>• Onkaparinga’s annual market share of South Australia’s overnight visitor numbers</td>
</tr>
<tr>
<td></td>
<td>• Define roles and responsibilities for delivering local marketing among key stakeholders, leading to creation of an effective an efficient local marketing partnership.</td>
<td>• Implement the city-wide tourism website (integrating tourism blog) driven by the city-wide tourism brand</td>
<td>• Visitation and yield of the Adelaide and South Australian market</td>
</tr>
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<td></td>
<td>• Work with SATIC, FPT and SATC to promote ATDW participation among local businesses and experiences</td>
<td>• Work with SATIC, FPT and SATC to promote ATDW participation among local businesses and experiences</td>
<td>• Volume of ATDW listings</td>
</tr>
<tr>
<td></td>
<td>• Establish a proactive social media engagement program in partnership with local businesses, FPT and SATC</td>
<td>• Establish a proactive social media engagement program in partnership with local businesses, FPT and SATC</td>
<td>• Onkaparinga’s visiting friends and relatives market segment</td>
</tr>
<tr>
<td></td>
<td>• Work with Business and Tourism Associations to develop a strong digital presence and social media capability to engage with our target markets, which further complement existing activities (i.e. brand development, visitor guide, etc)</td>
<td>• Work with Business and Tourism Associations to develop a strong digital presence and social media capability to engage with our target markets, which further complement existing activities (i.e. brand development, visitor guide, etc)</td>
<td>• Volume of content on SATC and Tourism Australia social media channels</td>
</tr>
<tr>
<td></td>
<td>• Investigate opportunities together with key stakeholders to create a sense of arrival into the McLaren Vale and Fleurieu Coast region at the southern end of the expressway (Old Noarlunga/Huntfield Heights) and other identified key gateways</td>
<td>• Investigate opportunities together with key stakeholders to create a sense of arrival into the McLaren Vale and Fleurieu Coast region at the southern end of the expressway (Old Noarlunga/Huntfield Heights) and other identified key gateways</td>
<td>• Onkaparinga’s market share of international visitors</td>
</tr>
<tr>
<td></td>
<td>• Work with the SATC in investigating the opportunity to develop routes/itineraries, responding to SA’s Southern Ocean Drive and Epicurean Way Touring Routes (noting both SATC touring routes include the City of Onkaparinga)</td>
<td>• Work with the SATC in investigating the opportunity to develop routes/itineraries, responding to SA’s Southern Ocean Drive and Epicurean Way Touring Routes (noting both SATC touring routes include the City of Onkaparinga)</td>
<td>• Within available resources, develop international marketing collateral reflecting current markets and emerging markets</td>
</tr>
</tbody>
</table>
Building the skills and knowledge of tourism businesses to enable business growth as well as delivering a consistent message and quality service that inspires visitors throughout their travel. Experiences enable visitors to understand the uniqueness of the destination through stories and personal service which has them telling their friends and family. Experience development not only motivating visitors to become ambassadors for the destination, but also gives them the tools to help them relive experience and promote the destination.

**Strategic direction:** Enable the development of additional and enhanced destination experiences, which build upon the brand and destination strengths, as well as the creation of new iconic experiences where supported by market demand.

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## EXPERIENCE DEVELOPMENT & CAPACITY BUILDING

Our opportunity: Experience development and capacity building

<table>
<thead>
<tr>
<th>What we will do</th>
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<tbody>
<tr>
<td>Implement a dedicated tourism training component as part of the ON Business Partner Program, to further develop and enhance the visitor experience.</td>
<td>Develop an annual industry capacity building/tourism training program which targets opportunities such as digital marketing, ATDW, international market-readiness, experience development and business mentoring</td>
<td>Volume of ATDW listings</td>
</tr>
<tr>
<td>Continue to support and build upon council led strategies/initiatives or tourism related owned infrastructure, which strongly contribute to visitation (e.g. cycling, arts, caravan parks, regional/state/national events etc.)</td>
<td>Work with SATC and FPT, to ensure the local tourism industry can take part in tourism trade engagement programs and events</td>
<td>Take up of industry accreditation programs by Onkaparinga businesses</td>
</tr>
<tr>
<td>Work with the marketing and events team to attract innovative events to the city. Innovative and unique events and experiences should align to brand strengths and create a more compelling, year-round events calendar</td>
<td>Support initiatives which respond to industry workforce training and development offered by government, peak bodies, tertiary education sector and training providers</td>
<td>Number of Onkaparinga tourism businesses utilising user generated content (UGC) services – TripAdvisor etc</td>
</tr>
<tr>
<td>In cooperation with internal teams, facilitate the development of Onkaparinga as a cycle-friendly visitor destination</td>
<td>Facilitate the development of commissionable visitor experiences for both the domestic and international markets</td>
<td>Improvement in user generated content ratings for Onkaparinga tourism businesses</td>
</tr>
<tr>
<td></td>
<td>Encourage and support the development of unique and appealing cultural experiences (including Aboriginal experiences), heritage and geo tourism initiatives</td>
<td>Number of new experiences/businesses in market in target sectors - food and wine, adventure, cycling etc</td>
</tr>
<tr>
<td></td>
<td>Promote the merits of, and ensure businesses have the capacity to take advantage of TripAdvisor and other user generated content portals</td>
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</tr>
<tr>
<td></td>
<td>Work with SATIC and FPT to encourage uptake of tourism Accreditation programs as a means of demonstrating high quality business credentials to market</td>
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</table>
Creating an authentic sense of place is a vital component in establishing a destination as an appealing place to visit. It is important to have the right business mix to attract visitors and locals, as often the vibe and energy of the local community attracts the visitor.

**Strategic direction:** Initiate a tourism-led place/precinct building program which creates welcoming places to visit.

### Our opportunity: Place and precinct building

<table>
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<tbody>
<tr>
<td>• Facilitate the implementation of the agreed priorities as identified in the association tourism roadmaps resulting from the tourism destination audits • Define and encourage the appropriate retail, entertainment and service mixes to attract visitors for the identified tourism precincts, supported by the development of a retail/opportunities prospectus</td>
<td>• Define the tourism positioning and offering for the McLaren Vale main street • Develop and implement a pilot tourism focused place building program in McLaren Vale, incorporating initiatives such as wayfinding, street dressing, public realm improvements, welcome/entry improvement and activation of a visitor hub • Define the tourism positioning and offering for Christies Beach • Build on the existing identified strengths of Aldinga, Willunga and Port Noarlunga • Prioritise foreshore activation initiatives, identifying zones for pop-up food and drink opportunities during peak periods as a means of growing visitor yield • Support cross-organisational initiatives and opportunities to improve the presentation of tourism precinct main streets, identifying tourism opportunities • Work with Assets and Technical Services in advocating for long vehicle parking in identified tourism precincts</td>
<td>• Customer perceptions of precincts – TripAdvisor ratings • Average visitor length of stay • Average visitor yield/daily expenditure</td>
</tr>
</tbody>
</table>
VISITOR SERVICING

A comprehensive approach to visitor servicing involves understanding the visitor journey and delivering across a range of touchpoints—from initial marketing and social media messaging through to in-destination service delivery. Whilst a personal approach has a higher influence on visitor activities and delivers quality experiences, digital wayfinding is paramount to ensure the destination is easy to navigate.

Our opportunity: Visitor servicing

<table>
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<tr>
<td>Focus the VIC’s role as a visitor inspiration centre, with an increased emphasis on influencing visitor plans and dispersal once in the destination</td>
<td>Upskilling the VIC team to have an emphasis on visitor service and experience delivery</td>
<td>Customer satisfaction and visitation through the VIC</td>
</tr>
<tr>
<td>Undertake customer journey mapping to guide wayfinding opportunities which build regional cohesion and improve visitor orientation</td>
<td>Developing the VIC as a hub for tours—potentially becoming a base for Uber pick-ups, autonomous vehicles, a base for events, event management etc</td>
<td>Dispersal of visitors around the region</td>
</tr>
<tr>
<td></td>
<td>Reviewing the space available in the VIC building with a view to creating a new visitor experience/reason to visit i.e. the story of the city and region</td>
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</tr>
<tr>
<td></td>
<td>Maintaining national visitor information centre accreditation</td>
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<tr>
<td></td>
<td>Reviewing VIC operations a sustainable operating model, reflecting the VIC’s role for Onkaparinga and as a gateway centre for the Fleurieu Region</td>
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</tbody>
</table>

Strategic direction: Deliver innovative visitor servicing, destination management and digital wayfinding which connects the City for visitors, businesses and community.
TOURISM INVESTMENT ATTRACTION (ASPIRATIONAL)

A proactive approach to targeting and encouraging new tourism development or experiences.

**Strategic direction:** Create an investor-friendly climate to enable sustainable business development, investment and growth throughout the City of Onkaparinga.

<table>
<thead>
<tr>
<th>Our opportunity: Tourism investment attraction</th>
<th>What we will do</th>
<th>How will we do it</th>
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</tr>
</thead>
</table>
| What we will do                                | • As part of the state planning framework review, lobby and provide feedback through the development policy team to advocate for policy which supports appropriate city-wide tourism development  
  • Identify and scope tourism infrastructure needs or experience gaps and work with the RDA, FPT and government agencies to progress the initiatives | Growth enabler  
  Review the planning framework with a view towards developing policy which is suited to coastal and nature-based tourism development/experience development opportunities.  
  Coastal experience development  
  Investigate development of the Port Noarlunga river precinct as a primary opportunity to activate the coast by:  
  • creating a new coastal tourism hub, connecting through to the Onkaparinga River National Park  
  • activating the Port Noarlunga Reef  
  Accommodation  
  Facilitate the development of new accommodation opportunities which support the brand positioning and align with market demand including:  
  • Boutique hotel accommodation  
  • Medium to large scale tourism accommodation with conference facilities  
  Onkaparinga Gorge  
  Work with the National Parks to identify and activate adventure and nature-based recreation experiences in Onkaparinga Gorge.  
  Cycling/Walking Trails  
  Advocate for the following trail initiatives connecting our experiences  
  • Link from Willunga to Coast Park Aldinga  
  • McLaren Vale to McLaren Flat using the off road network  
  • McMurtrie Road (connection to the Shiraz Trail)  
  • Witton Bluff - Christies Beach to Port Noarlunga  
  • Completion of the broader Coast Park trail  
  Advocate for the upgrading of the council owned tourist facilities ie Caravan Parks |                                                                                                                                   | • New developments  
  • New commercial room stock numbers |
Acronyms

ATDW  Australian Tourism Data Warehouse
FPT   Fleurieu Peninsula Tourism
MVGW&TA  McLaren Vale Grape Wine & Tourism Association
RDA   Regional Development Australia
SAEDB Southern Adelaide Economic Development Board
SATC  South Australian Tourism Commission
TICSA Tourism Industry Council South Australia
TA    Tourism Australia
UGC   User Generated Content
VIC   Visitor Information Centre
VFR   Visiting Friends and Relatives