



# Visitor Economy + Cycle Tourism Situation Analysis

*Prepared by*

TOURISM  SCHOOL

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# STATEMENT OF ACKNOWLEDGEMENT

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

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

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# Glossary

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

# EXECUTIVE SUMMARY

The Town of Gawler (TOG) has recognised the potential for the visitor economy as an economic driver for their community, and as a result, are wanting to strategically activate the industry, particularly focussing on the cycle tourism niche.

TOG can play a significant and diverse role in developing its visitor economy. The base infrastructure and core amenities that are enjoyed in the town by visitors are largely the product of the work of TOG, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services.

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

Although technically positioned in the Barossa tourism region, the TOG and its tourism product offering are not consistent with the product themes and brand values of the Barossa. However, it is well positioned to offer regional city amenities and supporting tourism product for those who are visiting, or potentially visiting the Barossa region.

The TOG has identified cycle tourism as a potential drawcard for the municipality, with some investment in cycle tourism already applied with the aim of attracting visitors who are either destination cyclists, or those who cycle whilst on holidays. Whilst the TOG has an immature portfolio of tourism product, it has some critical cycle tourism infrastructure in place, including a number of national standard shared paths, river and reserve trails, and a well-positioned and managed bike hub.

Currently there is no specific visitation data (or cycle visitation data) available for review for the TOG, however, micro metrics are available through the Gawler Visitor Information Centre and some digital marketing platforms to gauge visitor engagement of the town as a tourism destination. Wider metrics for the Barossa tourism region are available, however, they are too broad to apply to effectively measure the impact of the projects undertaken by TOG to activate the cycle tourism niche.

To uncover the Town's potential visitor economy, TOG engaged Tourism eSchool to work together with its key stakeholders and tourism industry partners to collaboratively develop a Situation Analysis and Cycle Tourism Plan to outline the state of play for tourism in the region, and to identify key strategic opportunities to leverage and engage with in the future.

To successfully develop the Situation Analysis, Tourism eSchool consulted all levels of industry, to ensure all available information was considered to draw realistic conclusions for TOG. Consultation included numerous 1:1 meetings with various stakeholders (all levels of industry and government), community workshop, and an online survey with industry (see section 4. Acknowledgements).

Through this consultation, Tourism eSchool confidently identified all the key internal and external stakeholders' roles and responsibilities, product, access, infrastructure, marketing, branding, resourcing and visitor servicing, in addition to the current visitor profile, and the strengths, weaknesses, threats and opportunities for the region.

From there, major opportunities for effective and sustainable visitor economy growth were able to be derived as 'opportunities' for consideration in the development of a Tourism Plan for Town of Gawler.

# 1. SETTING THE SCENE

## 1.1 The Visitor Economy

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

These visitors, which include international, interstate, intrastate and day trip visitors, provide benefits to the economy through the direct contributions of their tourism activities, as well as the indirect contributions via the value chain, such as the impacts of capital investment and Government expenditure. The visitor economy encompasses the contribution tourism makes to employment, investment, infrastructure development, exports, provision of temporary labour and social vibrancy.

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

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

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

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

<sup>2</sup> [https://www.tourismaccommodation.com.au/wp-content/uploads/2012/08/RETURN-ON-MARKETING-INVESTMENT-FOR-AUSTRALIAN-TOURISM-vrp2-16\\_7\\_14.pdf](https://www.tourismaccommodation.com.au/wp-content/uploads/2012/08/RETURN-ON-MARKETING-INVESTMENT-FOR-AUSTRALIAN-TOURISM-vrp2-16_7_14.pdf)

<sup>3</sup> ARTN Local Government Spend on Tourism report January 2017 (<https://regionaltourism.com.au/tecset/wp-content/uploads/2018/07/ARTN-Local-Government-Spend-on-Tourism-Report.pdf>)



## 1.2 Global Tourism Trends

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

The following trends are covered in detail in Trekk Soft's "Travel Trends Report 2019"<sup>4</sup>, Trekk Soft's "9 Travel Trends to Drive Tourism in 2018"<sup>5</sup> and the World Travel and Tourism Council's "Travel and Tourism: Global Economic Impact and Issues 2017"<sup>6</sup>.

### Experiences are at the heart of why people travel

Visitor travel for authentic experiences and when they have a positive experience, there is a high chance they will spread the word and advocate for a tourism product or region who delivers on their promise both on and offline. Therefore, maintaining a high level of visitor experience in a destination (across both local government and private tourism experiences) is a key consideration when looking to grow their visitor economy.

Some of the top experiences for 2019 will be:

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

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<sup>4</sup> Travel Trends Report 2019 > <https://www.trekksoft.com/en/academy/ebooks/travel-trends-report-2019>

<sup>5</sup> 9 Travel Trends to Drive Tourism in 2018 > <https://www.trekksoft.com/en/blog/9-travel-trends-that-will-drive-the-tourism-industry-in-2018>

<sup>6</sup> Travel + Tourism: Global Economic Impact + Issues 2017 > <https://www.wttc.org/-/media/files/reports/economic-impact-research/2017-documents/global-economic-impact-and-issues-2017.pdf>

## Mobile bookings will be the new default

The majority of travellers have smartphones (there is a 102% mobile penetration rate in the Asia Pacific Region<sup>7</sup>), and consumers are increasingly comfortable planning and booking experiences via their mobile devices. Therefore, any marketing and visitor servicing undertaken by destinations must have a strong focus on mobile.

## Invest in new Technologies with care

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

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

What visitors say about a tourism experience to their family and friends via online reviews or via word of mouth are the #1 and #2 most trusted forms of advertising<sup>8</sup>. Therefore, any destination marketing needs to focus on ensuring their region's visitor experience is high, which will then encourage positive advocacy of their destination by visitors and locals. All other investments in marketing should also be considered in this context, with a reduction in investment in less trusted advertising, and increase in investment in experience development and capacity building with individuals to deliver the on-ground visitor experience in a region.

## Generational differences are blurring

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

## Gen Xers are important travellers

While not the biggest consumer group compared to Baby Boomers or Millennials, they often spend the most money on travel. They are often working full time and spend the most on travel compared to younger and older counterparts. They often have kids, and therefore travel during school holidays. Travelling with the extended family is also increasingly common. Therefore, they are key visitor segment destinations should look to grow<sup>9</sup>.

## Chinese travellers mature

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<sup>7</sup> Hootsuite Digital in 2018, Essential Insights into Internet, Social Media, Mobile and eCommerce use around the world. > <https://hootsuite.com/pages/digital-in-2018>

<sup>8</sup> 2015 Nielsens Trust in Advertising Report – Australia > <http://www.nielsen.com/au/en/insights/news/2015/its-a-trust-thing.html>

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

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

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

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

## 1.3 National Tourism Priorities

The visitor economy is now recognised at all levels of government in Australia as an intrinsic, sustainable and driving part of economic development. It creates long term improvements in the liveability of cities, towns and rural life and significantly improves the prosperity of Australian communities.

Tourism has been identified in Australia's 'next wave of prosperity' as one of the top five sectors of economic growth and has the potential to become Australia's fastest growing industry.<sup>10</sup>

Tourism Australia (TA) is committed to an ambitious 2020 target of increasing the value of the visitor economy to the nation from \$70billion to \$115-140billion, driven by growth in inbound travel (particularly from Asia) and supported by continued growth in the domestic market.<sup>11</sup>

TA are on track to achieve their goal of more than A\$115 billion in overnight spend by 2020. At 30 March 2018, overnight visitor expenditure reached \$107.4 billion, up 6 per cent on the previous year. Recent forecasts indicate that overnight visitor spend will reach \$131 billion by 2020.<sup>12</sup>

Figure 1 - Progress of Total Overnight Visitor Expenditure against the Tourism 2020 Goal



According to Tourism Research Australia, the Australian tourism industry is forecast to grow to \$151 billion in overnight spend and 15 million international visitors by 2026-27.<sup>13</sup>

<sup>10</sup> Deloitte, Positioning for Prosperity? Catching the next wave. Building the Lucky Country #3, 2014, p3

<sup>11</sup> Tourism 2020 Overview > [http://www.tourism.australia.com/documents/Tourism\\_2020\\_overview.pdf](http://www.tourism.australia.com/documents/Tourism_2020_overview.pdf)

<sup>12</sup> Tourism Australia – 2020 Performance Update > <http://www.tourism.australia.com/en/about/our-organisation/our-performance-and-reporting/tourism-2020.html>

<sup>13</sup> Tourism Research Australia, Tourism Forecasts 2017, p1

## 1.4 State Tourism Priorities

In South Australia tourism continues as a key driver of the state's economy. The South Australian Tourism Commission (SATC) is currently working toward their 2020 strategy, which is focussed on achieving the South Australian tourism industry's full potential of \$8.0b of visitor expenditure and an additional 10,000 jobs by 2020<sup>14</sup>.

As at the year ending September 2018<sup>15</sup> the state has seen a rise in expenditure of 10% to a record \$6.9 billion (above the national growth rate of 9%) and is on track to achieving its goal of \$8b by 2020. In 2016/2017, the Tourism industry has supported 36,000 jobs directly, which has increased by 15% since the targets were set in 2012/13, and continues toward the progress of the goal towards an additional 10,000 jobs by 2020<sup>16</sup>

With regard to visitation, the state has experienced the following growth:

- Visits to South Australia grew 7% to a record high \$7.0million
- Nights in South Australia reached 33.5 million, up 2% for the year
- International expenditure has risen 4% to \$1.15billion
- Interstate expenditure rose 10% to a record high \$2.2billion
- Intrastate expenditure in South Australia also rose, up 8% to a record high \$2.0billion; and
- Day trip expenditure has grown 18% to \$1.6billion.

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

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of \$12.8b and 16,000 jobs by 2030.<sup>18</sup>

The Draft Plan 2030 suggests that while the Visitor Economy for South Australia in 2030 may look vastly different to today, much of the core proposition for travel will likely remain the same. Travellers will still be seeking out high quality immersive or relaxing experiences with friendly customer service that represents good value for their tourism dollar. Core draw-cards for South Australia are likely to remain the state's established strengths across key areas such as food and wine, nature-based tourism and cultural experiences.

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<sup>14</sup> South Australian Tourism Commission 2020 Strategy > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={F839DCB0-ACEC-43D6-A16F-E0A0EA409A08}&B=False>

<sup>15</sup> SATC 2020 Progress Report > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={90DA0D17-5A5F-4B33-A8FB-156568752731}&B=True>

<sup>16</sup> State Tourism Satellite Account 2016-2017 > <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={BEAF1F20-C78C-4262-9D1C-438A084656AF}&B=False>

<sup>17</sup> SA Regional Visitor Strategy - <http://tourism.sa.gov.au/research-and-statistics/strategies/south-australian-regional-visitor-strategy>

<sup>18</sup> SATC Draft Tourism Plan 2030 > <https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>

# 1.5 Barossa Tourism Region Focus

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

Figure 2 - Barossa Tourism Region Map (SATC)



As noted above, South Australia is targeting the stretch goal of \$8.0b total expenditure by December 2020, and of that total, \$273million has been earmarked for the Barossa region.<sup>19</sup> The Barossa region has achieved 70% of its 2020 target reaching \$190million at December 2017<sup>20</sup>.

An annual average for the region between 2015-2017 from the SATC Barossa Regional Profile<sup>21</sup> highlighted the following visitor statistics for the region:

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

In 2016-17, the tourism industry directly employed approximately 900 people<sup>22</sup>.

<sup>19</sup> Barossa Regional Profile December 2014-2016 > <http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={6C5174B0-DB1F-4A05-AF21-A951A4EF84B2}&B=False>

<sup>20</sup> Barossa Regional Profile December 2014-2016 > <http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={6C5174B0-DB1F-4A05-AF21-A951A4EF84B2}&B=False>

<sup>21</sup> Barossa Regional Profile 2015-2017> <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={6C5174B0-DB1F-4A05-AF21-A951A4EF84B2}&B=False>

<sup>22</sup> Barossa Regional Profile 2015-2017> <https://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={6C5174B0-DB1F-4A05-AF21-A951A4EF84B2}&B=False>

## 1.6 Town of Gawler Focus

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

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

TOG plays a significant and diverse role in developing its visitor economy. The base infrastructure and core amenities that are enjoyed in region by visitors are largely the product of the work of TOG, whether it is through placemaking assets, accessibility, natural and cultural environment, or the provision of visitor services.

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

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

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

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

It's clear from the Community Plan's objectives that TOG is committed to creating a Town that is conducive to supporting the visitor economy, as well as meeting the needs of residents. Tourism is a burgeoning economic driver for the Town, offering a great deal of potential as a destination in itself, and as a base for those wanting to explore the Clare Valley and Barossa Tourism regions.

Whilst there is no specific visitation data for TOG, during 2017/18 the Gawler Visitor Centre (GVIC) serviced 17,306 visitors to the region, mainly from Interstate (Victoria, New South Wales and Canberra) with a very small proportion from International markets.

TOG's key tourism product consists of outdoor and adventure activities (cycling paths, parks, reserves, ovals, playgrounds, soaring club, skate park, golf course, BMX tracks, Cycle hire facilities), History and Heritage (Museum, trails, churches, cemeteries, public buildings, main streets), Food and Dining (restaurants, pubs) and Tourism Events.

TOG is one of four local government municipalities that fall under the Regional Development Australia Barossa (RDAB) boundaries. RDAB highlights the visitor economy as a growth industry, and supports the sector through various projects, such as cycle tourism strategy development and capacity building, of which will support TOG in growing their visitor economy.

## 1.7 Cycle Tourism Landscape

Cycle tourism has been identified globally, by the United Nations World Tourism Organisation<sup>23</sup>, as a key growth adventure tourism activity due to its low-impact and high-spend nature. Not only is cycle tourism more sustainable environmentally, socially and economically but it also disperses visitors to areas that traditionally do not attract tourism and supports employment in local economies.

Cycle tourists can be categorised under two main market segments;

- Those who travel to a destination to cycle – those who are cycle enthusiasts who regularly travel with cycling as a primary motivator, and;
- Those who undertake incidental bike riding whilst on holiday – typically leisure cyclists where cycling is an incidental activity and plays no part in influencing travel behaviour.<sup>24</sup>

Cycle tourists typically stay longer, spend more and engage in a broader range of experiences than the average visitor, and as a result, can become a driver for increased economic prosperity for regional destinations. Studies have identified that whilst a cycle tourist's average daily spend is slightly higher than domestic visitors, their overall trip spend is nearly five times as high.<sup>25</sup>

Other key characteristics of cycle visitors include;

- They have a higher propensity to travel to regional areas, and high tendency to become repeat visitors to a destination
- They average daily spend is \$124 per night, average length of stay is 16 nights (compared to 5 nights for the average overnight visitor in South Australia<sup>26</sup>), and total trip expenditure is approximately \$2000 per domestic cycle tourist and \$5,005 per international cycle tourist<sup>27</sup>
- Twice as many cyclists travel on a long trip (5-night stay or more) to interstate regional destinations as those travelling to intrastate destinations (18% vs 8%)<sup>28</sup>
- They love fine wine, good restaurants (68%) and outdoor activities in natural environments (82%)<sup>29</sup>
- Cycle tourists typically travel at least three times per year, which suggests that cycle tourism is a niche but high engagement activity<sup>30</sup>

In terms of motivations, the cycle tourism market is dominated by cyclists who travel to destinations primarily because of the routes, trails, the riding experience that the destination offers, and events are also a key driver of travel motivation, as well as destination and facility awareness.

Between 2009-2014 the percentage of tourists that cycled in Australia increase by 25% by visitor number and 16% by visitor nights. In 2014, more than 2.9 million tourists in Australia cycled. In 2014, 1.1% of all Australian visitors participated in a cycling activity during their trip, while 5% of international visitors cycled.<sup>31</sup>

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<sup>23</sup>UNWTO Global Report on Adventure Tourism (2013) > <https://skift.com/wp-content/uploads/2014/11/unwto-global-report-on-adventure-tourism.pdf>

<sup>24</sup>Western Australia Cycle Tourism Strategy >

[https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/CDP%202017%20reports/180419\\_Westcycle%20Cycle%20Tourism%20Strategy.pdf](https://www.tourism.wa.gov.au/Publications%20Library/Research%20and%20reports/CDP%202017%20reports/180419_Westcycle%20Cycle%20Tourism%20Strategy.pdf)

<sup>25</sup>Faulks, Ritchie & Fluker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC, available at <http://atfiles.org/files/pdf/Faulks-Australia-Cycle-Tourism.pdf>

<sup>26</sup>SA Draft Tourism Strategy 2030

<sup>27</sup>Faulks, Ritchie & Fluker (2006), Cycle Tourism in Australia: An investigation into its size and scope, Sustainable Tourism CRC

<sup>28</sup>EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young, available at <https://www.tourismnortheast.com.au/wp-content/uploads/sites/54/24681-Cycling-Tourism-Full-Report-FINAL-16-NOV-2015.pdf>

<sup>29</sup>EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young

<sup>30</sup>EY Sweeney (2015), Growing Cycling Tourism in Victoria – Report, Ernst and Young.

<sup>31</sup>The South Australian Bike Economy (2016) > <https://innovationandskills.sa.gov.au/upload/publications/bike-economy.pdf>



For the year end September 2018, 46,000 international visitors to SA undertook cycling as an activity somewhere in Australia (10% of all international visitors to SA), and 112,000 domestic overnight visitors to SA cycled while here (approx.1.7% of domestic overnight visitors to SA).<sup>32</sup>

In South Australia, there are trails, tourism experiences and cycling events that bring thousands of visitors to the State. South Australia is a great place to ride as a commuter or for sport and South Australia has some of the most significant bike assets in Australia including Cycling Australia's High Performance Network and the Tour Down Under – an iconic sporting event and the largest bike business event in Australia.<sup>33</sup>

In 2015 a Roy Morgan survey identified that SA had 5 of the top 9 cycling destinations in Australia. Melrose in the state's Southern Flinders Ranges is one of the top mountain biking destinations, and the Mount Lofty Ranges are being developed as an international mountain bike destination.<sup>34</sup>

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

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

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<sup>32</sup> South Australian Tourism Commission, Research Team, (3 year average to September 2018) data received March 2019

<sup>33</sup> Growing the South Australian Bike Economy (2017) > [https://innovationandskills.sa.gov.au/upload/industry/bikeecon/SAGOV\\_BikeEconomy\\_FACTSHEET\\_LR.pdf](https://innovationandskills.sa.gov.au/upload/industry/bikeecon/SAGOV_BikeEconomy_FACTSHEET_LR.pdf)

<sup>34</sup> The South Australian Bike Economy (2016) > <https://innovationandskills.sa.gov.au/upload/publications/bike-economy.pdf>

# 2. SITUATION ANALYSIS

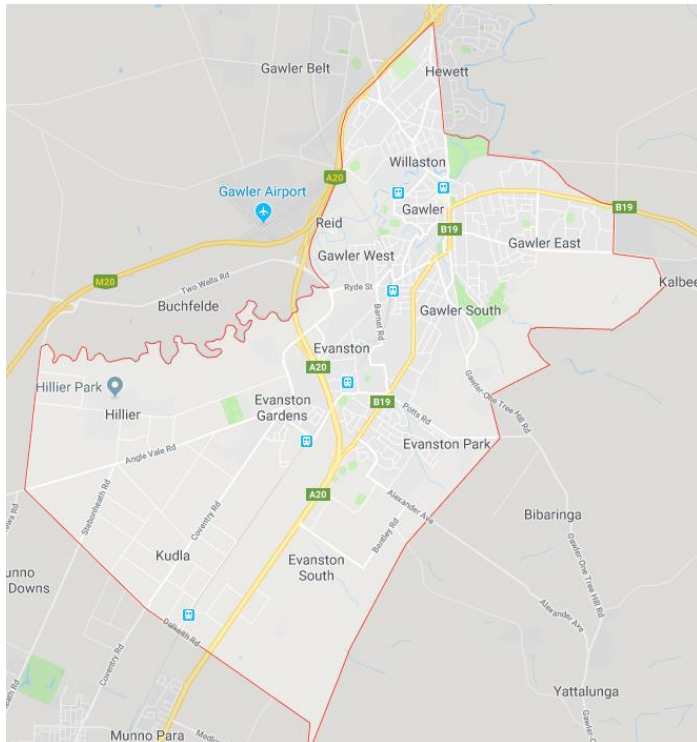
To obtain a clear understanding of the Visitor Economy and part of that, the Cycle tourism landscape for the TOG, a thorough analysis of key internal and external factors was undertaken, which include cycle experiences, cycle infrastructure, tourism experiences and assets, stakeholders, visitation, visitor markets, marketing investment, visitor servicing, branding and positioning.

## 2.1 Geographic Region

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

Covering over 41km<sup>2</sup>, there are a number of differing urban forms and land use characteristics within the Council Area. The South-Western precinct is predominantly rural with large blocks of land for ‘rural living’ and agricultural purposes. The Northern component of the Council Area is largely residential and is concentrated around the Town Centre. Residential precincts directly surrounding the Town Centre are well established and feature a number of state and local heritage items.

**Figure 3 - Town of Gawler Municipality Map**



## 2.2 Stakeholders

### 2.2.1 Barossa Tourism

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

#### Objectives and purposes of BT

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

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

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

### 2017-2019 Destination Marketing Strategy

#### *Customers*

BT place an emphasis on the following markets<sup>35</sup>:

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

The target demographic for the Barossa region overall is defined in Ross Honeywill's work on the New Economic Order (NEO)<sup>36</sup>. NEO's are typically those who:

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

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

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<sup>35</sup> Barossa - Commitment to Target Audiences by Entity – November 2017 (available on request)

<sup>36</sup> Ross Honeywill's NEO definition > <https://rosshoneywill.com/neos/>

## Key Projects Relevant to TOG Cycle Tourism and wider Visitor Economy

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

- *SA Regional Visitor Strategy* to drive the activation of relevant priorities areas for their region.
- *Barossa Vintage Festival and Barossa Gourmet Weekend* are key drivers of visitation and branding for the region overall and will impact potential numbers to TOG. *Barossa Tourism is expanding the Barossa Gourmet Weekend to a new 'Barossa Seasons' programme*, which will see an additional three quarterly events held throughout the calendar year.
- *Developing and distributing essential consumer digital and offline collateral* including Barossa.com, Barossa Touring Map and Barossa Regional Visitor Guide, of which key TOG product is highlighted

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

## 2.2.2 Gawler Business Development Group

The Gawler Business Development Group Inc. (GBDG) role is to help businesses located in TOG compete in an increasingly competitive market. The GBDG is currently contracted under a funding agreement by the TOG to deliver services to the business community until 30 June 2019, with a new funding agreement to commence from 1 July 2019 for a period of 2 years and an option to extend for a further 1 year period (maximum term of 3 years funding through to 2022), with an investment of minimum of \$170,600 + GST (plus CPI) per annum.

### Objectives + Purpose

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

## Key Projects Relevant to TOG Cycle Tourism and wider Visitor Economy

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

## 2.2.3 Gawler Wheelers

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

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

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

### *Gawler and Surrounds Cycle Guide*

The Gawler and Surrounds Cycle Guide ([available here](#)) was developed by Paul Koch (at his own cost) to share cycle routes around the Town and in the surrounding regions. He is an active GW leader and current TOG Elected Member. The guide is currently only available on the GBDG website.

## 2.2.4 Regional Development Australia Barossa

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

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

Specifically, RDAB supports the region by offering:

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

## Key Projects Relevant to TOG Cycle Tourism and wider Visitor Economy

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

- Proposed Adelaide Wine Capital Cycle Tourism Trail
- Art Music Design Barossa – Bringing together the creative communities of Barossa, Gawler, Light, Adelaide Plains in a virtual hub for ideas and inspiration, and connecting creatives with events, venues, suppliers and customers (<http://artmusicdesignbarossa.org.au/>). Development of Literary Trail in progress.

- Sector development (Wine, Food, Tourism) to becoming internationally ready, customer service, and sales + marketing, coop events.
- New Market activation – China ready strategy and industry development (via China ready toolkit)

## TOG Financial Contribution

- TOG has recently committed to a three-year funding agreement with RDA.
- TOG's CEO is a representative on the RDAB Board.

## 2.2.5 The Barossa Council

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

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

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

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

## How TOG and BVIC currently work together

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

## 2.2.6 Light Regional Council

Light Regional Council (LRC) have recently endorsed a new 2018-2023 Tourism Plan<sup>37</sup> in August 2018 and are working toward the attainment of their objectives.

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

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

### How TOG and KVIC currently work together

The KVIC and GVIC teams communicate to share information and ideas periodically.

## 2.2.7 National Trust of SA Gawler Branch

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

### Key Projects relevant to TOG Visitor Economy

- Open and maintain the Gawler Old Telegraph Station Museum (Open Tuesday to Friday, 1 – 4pm)
- Museum Group Tours on appointment (Currently receive around 6 per year)
- School Program on appointment. A Year 5 Curriculum module is delivered based around Migration to Gawler. The program is mainly taken up by local private schools, as they have had trouble finding the right person at public schools to approach about the program.
- Town Bus Tours on appointment (Around 6 per year). A NTSAG volunteers take tours around Town, focusing on niche topics such as "Grand Homes of Gawler" and "Gawler Cemeteries"
- Bring TOG Heritage stories to life via grant funding. For example, they were recently successful in receiving a small grant to create an interpretive display at Eagle Foundry B + B to tell Foundry Story.
- Special Events that bringing people together based around Gawler's history. The two most recent, and highly successful events were:
  - 'Migration to Gawler post WW2'. They ran an event bringing 50 people together whose families migrated to Gawler in 1948/1956. Major success
  - 'Timer Fashions' - From single Sunday Mail 'Can you Help' classified Add, they brought together 85 past employees for event in town (Myer Emporium Clothing Manufacture in Gawler)
- Information Flyers. These tell the stories of key historic feature of TOG. eg 4 Foundries who made agriculture implements and amazing Gawler Iron Lacework seen on many homes.

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<sup>37</sup> Light Regional Council Tourism Plan 2018-2023 > <https://www.light.sa.gov.au/webdata/resources/files/Tourism%20Plan%202018-2023%20Summary.pdf>

## How TOG and NTSAG currently work together

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

### 2.2.8 Barossa, Light + Gawler Regional Heritage Network

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

The group formed to facilitate the establishment of the *Barossa, Light + Gawler Regional Heritage Strategy*<sup>38</sup> and achieve the objectives contained by working proactively and collaboratively with each other and partner wherever possible with government, business and state and national heritage agencies and educational organisations. The Cultural Heritage Centre Coordinator attends Barossa, Light and Gawler Heritage Committee meetings and key role in activating heritage stories in TOG.

### 2.2.9 South Australian Tourism Commission

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

The SATC is responsible for:

- Providing leadership for industry and government for the collective ownership and achievement of the outcomes in the South Australian Tourism Plan 2020
- Foster collaboration among industry, business and Government
- Drive demand for South Australian experiences - Direct to consumer marketing, Public Relations and Families, and Digital marketing and facilitation
- Support the timely sharing and provision of research and insights that support good decision making by all stakeholders in the industry
- Work closely with aviation partners and other key access and transport stakeholders, such as Cruise Lines, to maintain and grow capacity and ease of access
- Improve understanding of the tourism industry's contribution to South Australia's economy
- Facilitate cooperative marketing
- Support the industry's ease of access to external business support programs, grants and other opportunities for industry development and investment
- Work closely with regions, industry associations and partners to grow tourism across the whole State.

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<sup>38</sup> Barossa, Light + Gawler Regional Heritage Strategy (available by request)



- Events South Australia (ESA) is a division of the SATC. It exists to promote South Australia as a tourism destination and attract visitors to the State through securing, managing, developing and supporting leisure events and festivals and providing leadership to the events and festivals industry.

In early 2019, the SATC developed a new draft South Australian Tourism Plan 2030 in consultation with industry, which outlines an ambitious target of \$12.8b and 16,000 jobs by 2030.<sup>39</sup> TOG do not currently work with SATC on any projects.

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<sup>39</sup> SATC Draft Tourism Plan 2030 > <https://tourism.sa.gov.au/research-and-statistics/strategies/tourism-plan-2030>

## 2.3 Tourism Assets

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

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

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

### 2.3.1 Experience Themes + Product Alignment

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

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

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

- **Primary Strengths** refer to key visitor experiences in the Town and are considered to be the Town's competitive advantages. Primary strengths include draw-card attractions and activities.
- **Supporting strengths** refer to tourism experiences that won't attract visitors on their own, however provide an important supporting role in a visitor's overall experience in the Town.

**Table 1 - Experience Theme Strength Summary**

EXPERIENCE THEME	STRENGTH CATEGORY
<b>Outdoor + Adventure</b> <i>Whether it is on bike, foot, air, in parks or reserves, there is an adventure or waiting for all ages, and levels of excitement and ability.</i>	Primary
<b>History + Heritage</b> <i>History is all around you in the Town. The Town's traditional custodians, the Kurna People's stories can be found around the natural environments, while early settler, colonial and manufacturing history can be experienced via heritage walks and drives, the traditional 'main street', museum, churches and cemeteries.</i>	Primary

<b>Food and Dining</b> <i>Home to classic country town Pubs and Beer Gardens, Bakeries and cafes that variety of choice for visitors in town.</i>	Supporting
<b>Events</b> <i>Major community events draw people to the town at certain times of year for different interest areas, while smaller community and local sporting groups fill the gaps in the calendar, making the town a vibrant place to live, work and play.</i>	Supporting
<b>Arts, Culture and Retail</b> <i>The town is home to unique retail offerings and creative people selling their art.</i>	Supporting

The following is a snapshot of the experience themes and related product within the council boundaries.

**Table 2 - Experience Themes + Product Alignment**

EXPERIENCE THEME	TOURISM PRODUCTS
<b>Outdoor + Adventure</b> <i>Whether it is on bike, foot, air, in parks or reserves, there is an adventure or waiting for all ages, and levels of excitement and ability.</i>	<ul style="list-style-type: none"> <li>• Cycle + Walking Trails/Paths - Jack Bobridge Track, Stuart O’Grady Way, Gawler Rivers Path Tapa Pariara</li> <li>• Gawler Bike Hub - Hire/Service/Facilities</li> <li>• BMX Trails around Dead Man’s Pass Reserve</li> <li>• Gawler BMX Club Bike and Pump Track (Elliot Goodger Memorial Park)</li> <li>• Clonlea Park + Skate Park</li> <li>• Clonlea Reserve Dog Park and Fitness Trail</li> <li>• Parks, Reserves, Ovals and Playgrounds</li> <li>• Gawler Aquatic Centre, Starplex, Gawler Sport and Community Centre</li> <li>• Adelaide Soaring Club (just outside council in Light Regional Council)</li> <li>• Little Hills Hobby Farm</li> </ul>
<b>History + Heritage</b> <i>History is all around you in the Town. The Town’s Traditional Custodians, the Kaurna People’s stories can be found around the natural environments, while early settler and colonial history can be experienced via heritage walks and drives, it’s traditional ‘main street’, museums, churches and cemeteries.</i>	<ul style="list-style-type: none"> <li>• Old Telegraph Station Museum</li> <li>• Heritage Trails - Historic Main Street Walking Tour, Church Hill State Heritage Walking Trail, EH Coombe Walking Tour, Cultural Walk, Town Self Drive Trail</li> <li>• Gawler Heritage Collection (Gawler Public Library), Cultural Heritage Centre + Exhibitions</li> <li>• Historic Churches, Cemeteries, Public Buildings, Main Street, Pubs + Parks (eg Deadman’s Pass, Pioneer Park)</li> </ul>
<b>Food and Dining</b> <i>The town offers visitors a wide variety of classic country town Pubs, Bakeries, Restaurants and Cafes.</i>	<ul style="list-style-type: none"> <li>• Pubs - 8 historic pubs around town</li> <li>• Cafes + Restaurants - Main Street and around town</li> <li>• Red Centre Enterprises</li> </ul>
<b>Events</b> <i>Major community events draw people to the town at certain times of year, while smaller community, small businesses and local sporting groups fill the gaps in the calendar, making the region a vibrant place to live, work and play.</i>	<ul style="list-style-type: none"> <li>• Country Music Festival</li> <li>• Gawler Show</li> <li>• Gawler Fringe</li> <li>• Gawler Village Fair</li> <li>• Gawler Carols</li> <li>• SA History Week Event Tours</li> <li>• Sporting Events - Gawler Wheelers, Gawler BMX Club, Skate Park Event + Competition, Adelaide Soaring Club.</li> <li>• Horse Racing (Gawler + Barossa Jockey Club)</li> <li>• Greyhound racing (Gawler Greyhound Racing Club)</li> <li>• Harness Racing (Gawler Harness Racing Club, just outside council in Light Regional Council)</li> </ul>

	<ul style="list-style-type: none"> <li>• Food Producers - Food Forest (Open Days/Workshops)</li> <li>• Gawler Swap Meet</li> <li>• Weekly markets held at various locations</li> </ul>
<b>Arts + Culture + Retail</b> <i>The town is home to many public works of art, local artists, workshops and retail offerings.</i>	<ul style="list-style-type: none"> <li>• Artists - Aboriginal Artists, Gawler Arts Society</li> <li>• Classes/Workshops</li> <li>• Public Art</li> <li>• SALA Events</li> <li>• Gawler Community Gallery</li> <li>• Retail/Niche Interest - Vadoulis Garden Centre, Gawler Sweets, Lesley's Boutique, Wintulichs smallgoods, Gawler South Bakery</li> <li>• Gawler Cinema</li> </ul>

## 2.3.2 Cycle Infrastructure

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

### Current

#### *Bicycle Hub at the Gawler Visitor Information Centre*

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

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

Some of the challenges for this asset include:

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

#### *The Jack Bobridge Track*

The Jack Bobridge Track (JBT) involves 40km of shared path, connecting Angaston to East Gawler through a number of Barossa townships and wineries. Currently the shared path network terminates 1.3km short of Council's eastern boundary near Sunnydale Drive. Connections to the Gawler Town Centre are currently on-road along either Calton Road

or Barossa Valley Way/Lyndoch Road (two high volume roadways without cycling infrastructure) to access the town centre.

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

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

Some of the challenges for this asset include:

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

### *The Stuart O'Grady Bikeway*

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

Some of the challenges for this asset include:

- No continuous off-road cycle connection from the Gawler Bike Hub. Visitors need to use on-road cycling from GBH to Gawler Rivers Path, and then more on-road cycling to start of SOB at the Northern Express Way. Feedback from GVIC is it can be hard to follow and has to be manually marked on current visitor maps.
- Poor visitor experience on the trail. It's straight, flat, not much to see and currently ends abruptly on a major highway.
- No dedicated marketing (to promote and set visitor expectations for the track)

### *Gawler Rivers Path (Tapa Pariara)*

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

Some of the challenges for this asset include:

- Lacks food/dining destinations along the path
- Dated interpretation signage in areas

- No off-road connection to from the Gawler Cycle Hub to join the Path
- No cycle trail (either on or off-road) via Gawler East connecting it back to Gawler Cycle Hub
- No dedicated marketing (to promote and set visitor expectations for the track)

## Proposed/Potential Infrastructure

### *The Gawler Greenway*

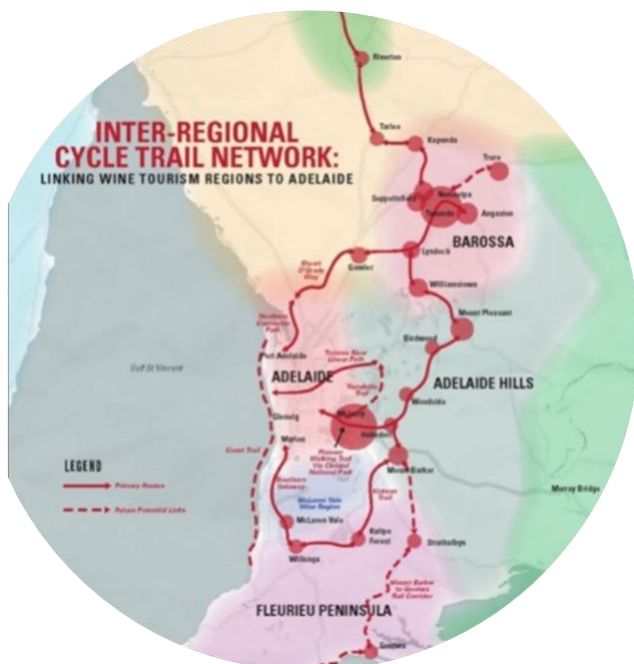
The Gawler Greenway is a long-term vision by the State Government for a cycling route and improved access to public transport extending from the Adelaide CBD to Gawler. The alignment typically follows the Gawler railway line. The route is substantially completed between Regency Road and the Adelaide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

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

### *Adelaide Wine Capital Cycle Trail*

This proposed cycle trail will connect the McLaren Vale, Adelaide Hills, Barossa and Clare Valley food, wine and tourism regions by bike. It is currently in planning and development stage with various stakeholders at state, local government and industry body levels. The Trail offers a significant longer-term opportunity for TOG to tap into the higher yielding, international food and wine cycling enthusiasts.

**Figure 4 - Adelaide Wine Capitals Cycle Trail Network Map**



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

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

### *Mountain Biking Trails*

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

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

### 2.3.3 Accommodation

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

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

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

The town doesn't offer any large-scale accommodation, with the closest option being the Novotel Barossa Valley Resort, which is a 20-minute drive east at Rowland Flat (towards Tanunda), and located in Light Regional Council. The Novotel Barossa Valley Resort is located next to the Jack Bobridge Cycle Track, offering cycling access south into Gawler.

Anecdotal evidence from the stakeholder engagement workshops highlighted the lack of quality motel style accommodation in Gawler and opportunities to further activate areas in TOG for RV travellers (including main street parking).

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

**Table 3 - Accommodation Product in Town of Gawler**

<b>Bed and Breakfasts + Self Contained Accommodation</b>	<ul style="list-style-type: none"> <li>• Church Hill Mews</li> <li>• Eagle Foundry Bed and Breakfast</li> <li>• Quilters Studio</li> <li>• Rivergum Cottages</li> <li>• The Church Gawler</li> <li>• Nana's Bed and Breakfast Gawler</li> </ul>
<b>Caravan Parks, Camping + RV Dump Points</b>	<ul style="list-style-type: none"> <li>• Gawler Caravan Park</li> <li>• Gawler Gateway Tourist Park</li> </ul>



## 2.3.4 Events

Several major community events are held in and/or include areas of the TOG.

TOG is also home to various sporting facilities and community run event spaces, which could be further activated to support local community or niche interest events.

**Table 4 - Sport + Community Event Venues**

<p><b>Recreational, Sport + Community Event Venues</b></p> <p><i>The TOG is home to council or community owned sporting and event facilities.</i></p>	<ul style="list-style-type: none"> <li>• Gawler BMX Club Bike Track (BMX events)</li> <li>• Gawler Skate Park (Clonlea Park)</li> <li>• Sporting Complexes (Gawler Aquatic Centre, Starplex, Gawler Sport and Community Centre)</li> <li>• Gawler Civic Centre</li> <li>• Greyhound Racing (Nixon’s Function Centre)</li> <li>• Function centres at various hotels</li> <li>• Gawler + Barossa Jockey Club (The Terrace Function Centre)</li> <li>• Park + Playgrounds (Key parks include Apex, Clonlea, Pioneer, Dead Man’s Pass)</li> <li>• Sports Ovals + Pitches (Gawler, Princes, Elliott Goodger, Willaston, South Gawler, Karbeethan Reserve)</li> <li>• Community Halls</li> <li>• Walker Place, Gawler Main Street Precint</li> </ul>
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## Tour Down Under

In late 2018, TOG Elected Members voted against submitting an expression of interest to host a start or finish of the 2020 Tour Down Under due to the financial costs involved<sup>40</sup>. TOG has previously hosted TDU starts in 2002 and 2010, and had the ride pass through the town in 2011. With costs of up to \$25,000 required to host a stage of the TDU, in addition to other fees of facilitating the event, it would be debatable if TOG would see a positive ROI on the event for a single day event. Community and local media feedback were mixed on the decision<sup>41</sup>.

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

<sup>40</sup> The Bunyip, 3 January 2019, Page 12

<sup>41</sup> The Bunyip, 3 January 2019, Page 8

## 2.3.5 Touring Routes

Touring routes are key experiences that encourage the dispersal and increased spend of visitors around South Australia. At a state level, the South Australian Tourism Commission has a state-wide tourism strategy promoting key drive routes that link the state's best tourism experiences (see [southaustralia.com](http://southaustralia.com)<sup>42</sup>). Of the Touring Routes developed and marketed by the SATC, the *Epicurean Way* and *Explorers Way* traverse through the Barossa tourism region and have the potential to offer visitation growth opportunities for the TOG with enhanced marketing.

### Epicurean Way

The Epicurean Way<sup>43</sup> links together the iconic food and wine experiences of McLaren Vale, Adelaide Hills, Barossa and Clare Valley. Whilst this Trail doesn't traverse the TOG boundaries, it goes through neighbouring townships of Williamstown and Lyndoch, therefore opportunity exists to drive visitation into Gawler via the Jack Bobridge Trail.

### Explorer's Way

Similarly, the Explorers Way<sup>44</sup> is a journey through the heart of Australia's landscapes and outback and extends beyond the South Australian Borders into the Northern Territory's top end. The Journey starts in Adelaide and navigates its way through Gawler, highlighting the Gawler Visitor Information Centre on the official map. Given that Gawler is highlighted on the map, there is a real opportunity to leverage the marketing efforts, to get visitors to consider staying longer within the TOG.

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<sup>42</sup> Epicurean and Explorer's Way > <http://southaustralia.com/things-to-do/road-trips>

<sup>43</sup> Epicurean Trail > <http://southaustralia.com/things-to-do/road-trips/epicurean-way>

<sup>44</sup> Epicurean Trail > <http://southaustralia.com/things-to-do/road-trips/explorers-way>

## 2.3.6 Community Tourism Assets

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

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

### Parks + Reserves

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

#### *Pioneer Park*

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

#### *Clonlea Reserve*

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

#### *Deadman's Pass*

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

#### *Apex Park*

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

#### *Karbeethan Reserve*

Karbeethan Reserve, a 9.96ha sporting precinct located in Evanston Gardens provides:

- sporting infrastructure including; a baseball diamond, a soccer pitch, three additional turfed areas that are utilised for multiple sports, a small clubroom and changing facility;
- a home ground for a number of local sporting clubs and associations; and
- open space for community use.

In February 2018, Council engaged consultants JPE, collaborating with InsideEdge, to undertake the development of a Master Plan<sup>45</sup> for the reserve. The purpose of the Master Plan is to provide TOG with a coordinated and strategic planning approach to allow for the effective and efficient provision, management and development of sport and recreational facilities at the site.

The Master Plan went out for public consultation in early 2019, with a report due to go to TOG council in mid 2019 for adoption to proceed to the next stage.

## Gawler Civic Centre + Public Library

The Gawler Civic Centre and Public Library was reopened in February 2019 after significant refurbishment. The primary purpose of the Centre is to revitalise and redevelop existing Main Street and provide community buildings that will drive economic growth, create new jobs and strengthen the social and cultural base of Gawler and the broader region.

The Gawler Civic Centre contains six business functions that offer community and visitor economy benefit to the Town:

- Gawler Public Library
- Cultural Heritage Centre and Gallery
- Function Venues and Meeting Rooms
- Youth Space
- Business Innovation Hub
- Niina Marni - Social Enterprise Cafe

Collaboratively these offerings will enable the Centre to once again be the service centre for the broader Gawler region. The Centre aims to provide a genuine, new cultural tourism experience, be an economic driver and a community connection point for the region.

## Tours + Trails

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

- Gawler Main Street Walking Tour<sup>46</sup>
- Gawler Church Hill State Walking Tour<sup>47</sup>
- Gawler Driving Tour<sup>48</sup>
- EH Coombe Walking Tour<sup>49</sup>

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<sup>45</sup> Karbeethan Reserve MasterPlan > <https://www.gawler.sa.gov.au/your-voice/12436/karbeethan-reserve-master-plan>

<sup>46</sup> Main Street Walking Tour Brochure > <https://s3-ap-southeast-2.amazonaws.com/TOG-public-assets/docs/Tourism-and-Events/Gawler-Main-Street-Walking-Tour-Web-low-res.pdf>

<sup>47</sup> Church Hill State Walking Tour Brochure > <https://s3-ap-southeast-2.amazonaws.com/TOG-public-assets/docs/Tourism-and-Events/Gawler-Church-Hill-Walking-Tour-Web-low-res.pdf>

<sup>48</sup> Gawler Driving Tour > <https://s3-ap-southeast-2.amazonaws.com/TOG-public-assets/docs/Tourism-and-Events/Gawler-Driving-Tour-Web-low-res.pdf>

<sup>49</sup> EH Coombe Walking Tour. Brochure > <https://s3-ap-southeast-2.amazonaws.com/TOG-public-assets/docs/Tourism-and-Events/E.-H.-Coombe-Walking-Tour-Web-Version.pdf>

## The Gawler Community Gallery

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

## Gawler National Trust 'Old Telegraph Station' Museum

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

## Gawler Aquatic Centre

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

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

A Needs and Feasibility Analysis report for the Gawler Aquatic Centre was tabled at the 28<sup>th</sup> March 2017 Council Meeting. A new 'Essex Park + Gawler Showgrounds Region Sporting Precinct Masterplan' will supersede the Gawler Aquatic Centre's Needs and Feasibility Analysis, which is due for completion in mid 2020.

## 2.3.6 Placemaking Assets

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

Following is an overview of TOG's key Placemaking localities.

### Murray Street

Gawler's Historic Main Street, Murray Street, is a key visitor precinct for both cycling and non-cycling visitors. During the stakeholder consultation, the following challenges and opportunities were identified for Gawler Main Street:

- *Streetscaping* - More public art, more street trees, continued restoration of heritage building + interpretation, minimum standard of landlords for non-heritage facades

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

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

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

## Train Station Precincts

TOG maintains six train stations within its municipality, Gawler Central, Gawler Oval, Gawler, Evanston, Tambelin and Kudla. TOG play an advocacy/facilitation role in upgrading train station precincts and have highlighted in their 2017 - 2027 Community Plan<sup>50</sup>:

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

The Gawler Central and Gawler Stations are key visitor touchpoints.

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

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

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

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<sup>50</sup> Town of Gawler 2017-2027 Community Plan > <https://s3-ap-southeast-2.amazonaws.com/tog-public-assets/docs/Strategic-Development/2017-2027-Gawler-Community-Plan-July-2017-low-res.pdf>

## 2.4 Tourism Access

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

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

### 2.4.1 Road + Cycle Infrastructure

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

TOG's Asset Management Plan (AMP) is prepared under the guidance of Council's Vision, Mission, Goals and Objectives, whilst taking into consideration requirements outlined by Legislative requirements, and community expectations. The AMP outlines service levels and strategies for all transport related upgrades.<sup>51</sup>

#### Roads

Road upgrade and renewal funding opportunities exist outside of the allocation given by the *Roads to Recovery Program*<sup>52</sup> which is used to support the AMP. Specifically, the competitive *Special Local Roads Program (SLRP)*<sup>53</sup> grant program, is the most relevant for tourist roads as 'Tourism' is highlighted as one of the 3 main criteria assessed in the application and evaluation process. A regional technical group assesses annual applications to recommend priorities for an advisory panel to recommend for funding by the Minister for Transport.

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

In terms of opportunities outside of the region, the opening of the Northern Connector road infrastructure project, which is due for completion late 2019, will improve road access to the Region from the City and particularly the Port, with proposed improvements to travel time.<sup>54</sup>

#### Shared Paths

As identified in section 2.3.2, the TOG has several shared paths that traverse the town, these include the Jack Bobridge Track, Stuart O'Grady Bikeway, and the Gawler River's Path. From an access perspective, the main challenge for TOG is that the Jack Bobridge Track and Stuart O'Grady Bikeway currently do not map into the centre of the Town (as outlined in section 2.3.2), leaving cyclists to use main roads to navigate through the Town. However, TOG have applied for the

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<sup>51</sup> TOG Transport Asset Management Plan > <https://s3-ap-southeast-2.amazonaws.com/TOG-public-assets/docs/Engineering/Transport-Asset-Management-Plan-adopted-2013-08-27.pdf>

<sup>52</sup> Roads to Recovery > [http://investment.infrastructure.gov.au/infrastructure\\_investment/roads\\_to\\_recovery/](http://investment.infrastructure.gov.au/infrastructure_investment/roads_to_recovery/)

<sup>53</sup> Special Local Roads Program > <https://www.lga.sa.gov.au/page.aspx?c=74921>

<sup>54</sup> Northern Connector > [https://www.infrastructure.sa.gov.au/nsc/northern\\_connector/publications?a=70735](https://www.infrastructure.sa.gov.au/nsc/northern_connector/publications?a=70735)

Building Better Regions Fund - Round 4, with the intention of completing both of these Shared Paths into the centre of town. Opportunities have been outlined to better connect the Paths into town via Signage and Visitor Information in the interim.

## 2.4.2 Adelaide Airport

The SATC works closely with domestic and international airline partners and the Adelaide Airport to attract new airlines and grow seat capacity of existing airlines, making it easier for visitors to get to the State. Increasing direct air access to Adelaide is key to attracting increased visitor numbers to regional South Australia, as nearly half of all visitors to South Australia visit regions.<sup>55</sup> Key opportunity for TOG to leverage growth of visitors through Adelaide Airport is to keep lines of communication open between SATC via Tourism Barossa around relevant aviation related projects.

## 2.4.3 Tour Operators + Bike Hire

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

Tour operators based in Adelaide heading to Clare Valley, Flinders Ranges and Riverland also traverse the region via several different routes. The Flinders Ranges has the highest number of international visitor nights of all South Australian Regions<sup>56</sup> and therefore presents an opportunity for TOG to capitalise on this market as they traverse the region.

## 2.4.4 Public Transport

Gawler Taxis<sup>57</sup> are the local taxi service within the town and are open 7 days a week. They also provide transport to and from Adelaide and Adelaide Airport. Additionally, the Town is serviced by Suburban Taxis<sup>58</sup> and Uber<sup>59</sup>. Gawler Car and Truck rentals<sup>60</sup> also offer car hire services for people requiring car hire in region (not available at Adelaide Airport).

The Adelaide Metro public transport system supports bus and rail services to and throughout TOG. TOG is home to six Gawler train stations, Kudla, Tambelin, Evanston, Gawler (centre of the Town), Gawler Oval, and Gawler Central (Gawler CBD, 2-minute bike ride to Gawler VIC) every half an hour from Monday-Friday from 5am-1130pm, and between 6am-11:30pm Saturday, Sunday and Public Holidays.<sup>61</sup>

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<sup>55</sup> South Australia Visits to Regions > <http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={530D7E3A-D1C8-4762-BAE8-5FF7898622EB}&B=True>

<sup>56</sup> SA Visit to Regions > <http://tourism.sa.gov.au/documents/CORP/documentMedia.ashx?A={530D7E3A-D1C8-4762-BAE8-5FF7898622EB}&B=True>

<sup>57</sup> Gawler Taxis > <http://www.gawlertaxis.com.au/>

<sup>58</sup> Suburban Taxis > <https://www.suburbantaxis.com.au/>

<sup>59</sup> Uber > <https://www.uber.com/en-AU/cities/adelaide>

<sup>60</sup> Gawler Car Rentals > <http://gawlercarrentals.com/>

<sup>61</sup> Adelaide Metro > <https://adelaidemetro.com.au/routes/GAWC> and [https://adelaidemetro.com.au/content/download/5216/94193/file/Gawler\\_train\\_ttable\\_routemap\\_22-04-18.pdf](https://adelaidemetro.com.au/content/download/5216/94193/file/Gawler_train_ttable_routemap_22-04-18.pdf)



Passengers can carry bikes on trains for free on trains Monday to Friday between 9.01am and 3pm or between 6pm and the last service when space is available. Bikes can be carried Free Saturday, Sunday & public holidays all day when space is available. At all other times a peak concession fare must be purchased for bikes.<sup>62</sup>

The electrification of the Gawler Rail Line is currently underway, and is due for completion in later 2020. The completion of the electrification will provide increased frequency of services and improved customer experience for train users<sup>63</sup>.

Adelaide Metro also service Gawler via several circuit loops throughout the town, but there is no bus that takes passengers from the City of Adelaide to TOG directly during daylight hours (there is a 'After Midnight Service'<sup>64</sup>).

Premier Stateliner passenger transport services the TOG on their 'Riverland' round trip service departing from the Adelaide Central Bus Station. The coach stops at the Gawler Visitor Information Centre four times a day – 2 services in each direction.<sup>65</sup>

Similarly, YP Coaches services the TOG, departing from the Adelaide Central Bus Station and stopping at the Gawler Visitor Information Centre three times during weekdays, and twice over the weekend on their timetable to and from the 'Mid North'.<sup>66</sup>

Interstate trains The Overland, The Ghan, The Indian Pacific and The Southern Spirit, operated by Great Southern Rail, arrive and depart from the Adelaide Parklands Terminal located three kilometres from the city centre. All guests on the Indian Pacific Sydney to Perth route have a Barossa Valley or Hahndorf excursion built into the experience, which is therefore presents the opportunity for TOG to work in partnership with key tourism stakeholders to increase regional product in excursion itineraries.<sup>67</sup>

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<sup>62</sup> Adelaide Metro > <https://adelaidemetro.com.au/Using-Adelaide-Metro/Bikes>

<sup>63</sup> [https://www.dpti.sa.gov.au/infrastructure/public\\_transport\\_projects/gawler\\_rail\\_electrification\\_project](https://www.dpti.sa.gov.au/infrastructure/public_transport_projects/gawler_rail_electrification_project)

<sup>64</sup> Adelaide Metro > [https://adelaidemetro.com.au/content/download/889/57835/file/224-N224\\_ttable\\_routemap\\_17-12-17.pdf](https://adelaidemetro.com.au/content/download/889/57835/file/224-N224_ttable_routemap_17-12-17.pdf)

<sup>65</sup> Premier Stateliner > <http://premierstateliner.com.au/>

<sup>66</sup> YP Coaches > <http://ypcoaches.com.au/services/>

<sup>67</sup> Great Southern Rail > <https://www.greatsouthernrail.com.au/>

## 2.5 Tourism Infrastructure

In addition to the cycle paths, TOG is responsible for delivery and maintenance of other infrastructure in the Town which supports the activation of both the visitor economy and cycle specific visitor economy.

### 2.5.1 Signage

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

Tourism signs around TOG are as follows:

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

### 2.5.2 Public Amenities

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

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

### 2.5.3 Free WIFI

Free WIFI is a positive visitor service that can support the advocacy of experiences and towns by visitors. TOG is rolling out free WIFI in 2019 via its CCTV infrastructure to Murray Street, Pioneer Park, Clonlea Reserve and Julian Terrace, which is a positive step in driving visitor advocacy for the Town. The GVIC currently provides free WiFi.

### 2.5.4 Information Bays

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

## 2.5.5 Parking

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

In 2017, TOG undertook a study to review the current car parking provision within Gawler Town Centre. A number of recommendations have been made from the study covering the car parking fund, parking management, signage and wayfinding, pedestrian access and amenity and wider travel access to the town centre.<sup>68</sup>

In July 2018, TOG council committed to improving RV car parking along Union Street, Main North Road (adjacent from the Gawler Caravan Park) and at the Gawler VIC.

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

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<sup>68</sup> TOG Town Centre Car Parking Strategy Report > <https://www.gawler.sa.gov.au/your-voice/6424/gawler-town-centre-2017-2020-car-parking-strategy>

## 2.6 Tourism Resources

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

### 2.6.1 Business Enterprises and Communications

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

- The Group Manager oversees the strategic delivery of projects and sub departments
- Economic Development sits within this group, and manages the agreement/funding of Gawler Business Development Group
- Special Projects Officer is responsible for key projects that sit across areas such as cycle and visitor economy, including the development of the Cycle Tourism Plan.
- Senior Visitor Information Centre Officer is responsible for management and operators of the GVIC, as well as all Tourism related marketing activities.
- Coordinator, Marketing and Communications is responsible for council wide communication, branding, Graphic design and marketing activities (outside of Visitor Centre marketing activities).
- The Cultural Heritage Centre Coordinator attends Barossa, Light and Gawler Heritage Committee meetings and key role in activating heritage stories and the Heritage Collection.

### 2.6.2 Infrastructure and Engineering Servicing

- Manager is responsible for key infrastructure and engineering projects across council, including the implementation of the Gawler Cycling and Walking Plan 2017 - 2027. Many actions within this Plan will support the Cycling and Walking Plan.
- Team Leader, Asset Planning also supports the implementation of the TOG Cycling and Walking Plan 2017 - 2027

### 2.6.3 Elected Members

- Three of the current elected members of Council are active Cyclists and excellent resources for understanding the current challenges and opportunities for growing Cycle Tourism in TOG
- Two of the three are also members of Gawler Wheelers Cycle Club, who have opportunity to help leverage activities of this new Cycle Tourism Plan.

## 2.7 Branding

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

### 2.7.1 Strategy

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

### 2.7.2 Logo / Brand Identity

The TOG recently reviews and redeveloped a brand identity for the Town, with implementation details outlined in the TOG Brand Standards Document<sup>69</sup>. The brand standards have been developed to support the application of the logo and to ensure consistency in all areas of use.



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

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



### 2.7.3 Barossa Brand

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

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<sup>69</sup> Town of Gawler Brand Standards Document – Updated July 2018 (available via TOG Marketing Team)

## 2.8 Marketing

Many of the tourism stakeholders of TOG undertake marketing activities for the Town, as outlined in Section 2.2. However, from a TOG perspective, Gawler Visitor Centre and the TOG Marketing and Communications Coordinator initiates and implement most of the marketing and visitor communications for the town.

### 2.8.1 Senior VIC Coordinator

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

- Website: TOG have visitor information located on the Council Website under “Discover” section, which they are currently expanding to be more customer focused (<https://www.gawler.sa.gov.au/discover>). No visitor engagement or conversion metrics are being tracked on the websites.
- Social Media: TOG have a dedicated Facebook Page for the Visitor Centres (<https://www.facebook.com/GawlerVisitorInformationCentre/>), which mainly used to share local events and local business updates. Due to lack of resources it is only posted to on a reactive basis, there is no strategic plan or measurement of its activities, it lacks a content calendar or strategic storytelling focus, which is reflective of its very low engagement.
- Advertising: Only advertising GVIC invests in is the annual Barossa Visitor Guide.

### 2.8.2 Coordinator, Marketing and Communications

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

- Website updates
- Social Media posts
- Collateral Design Support, Brochures, maps etc.
- Signage
- Special marketing/comms projects (eg. Gawler Branding Project)

### 2.8.3 Australian Tourism Data Warehouse Product Listings

Australian Tourism Data Warehouse (ATDW) is the national digital database for tourism product, providing free listing for all South Australian tourism businesses and events, which can then be distributed throughout Australia and global websites, such as [www.southaustralia.com](http://www.southaustralia.com) and [www.barossa.com](http://www.barossa.com).

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

When cross referenced with the number of experiences outlined in the tourism asset list it was found many key experiences and events, including cycle products, in TOG are not listed, therefore missing out on free publicity of the product online.

## 2.9 Visitor Servicing

TOG is financially responsible for all operations relating to the Gawler Visitor Information Centre (GVIC) and offering information services to visitors in the Town. It is located at 2 Lyndoch Road, near the Main Street, and overlooks Pioneer Park. In the last financial year 2017/2018 the GVIC received 17,350 visitors in person or enquiries on the phone, with peak seasons being spring and autumn (see section 2.10.2).

### 2.9.1 In-Person

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

### 2.9.2 Bookings

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

### 2.9.3 Online

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

### 2.9.4 Brochures + Maps

- *Town Maps* - GVIC has to use 3 different maps (Gawler Town Map, Gawler River Trails, Barossa By Bike) to show visitors where to ride in town, due to limited space on current town map. The current town map is also very dated, whole back side lists street references, and could be put to better use showcasing town cycle trails, itineraries and attractions.
- The TOG Visitor Guide will be available for visitors from mid 2019. It has only small amount of cycle information in it.
- For the 4 TOG managed tours and trails (see <https://www.gawler.sa.gov.au/discover/top-attractions/tours-and-trails>) a small print run of hard copies is produced. These brochures are only distributed in hard copy from

the Visitor Centre and available to download from the TOG website, as they want Visitors to come to the Centre to find out this information. Barossa VIC also distributes the trail brochures.

- A number of other special interest fact sheets are developed and printed by the GVIC (such as the Dining Guide, Accommodation Guide + Gawler Rivers Path, Indoor Activities, Outdoor Activities, Opportunity Shops etc), All are available for download on the TOG website with hard copies available at the GVIC.
- TOG tourism experiences have their brochures displayed in the GVIC free of charge once they have completed a participation agreement. However, as many businesses haven't completed the agreement (due to not reading emails/businesses) some are missing out.
- Brochure Hubs - TOG sees itself as a gateway to many of South Australia's key regions, therefore stocks a large range of visitor guides and operator brochures from outside of the region.

## 2.9.5 Industry Engagement

- *Famils.* The GVIC works with surrounding regions to invite relevant staff to the Town for famils, such as the upcoming Adelaide Visitor Centre famil of up to 30 staff (mid 2019), and hoping to do the same with Kapunda and Barossa Visitor Centres.
- *Industry newsletter.* The GVIC currently doesn't undertake any email communications with local industry due to lack of resources.
- *Local Retail and Dining.* The GVIC has trouble engaging local retail businesses in main street (eg. The "Gawler Go Cup" (takeaway coffee cup) initiative, of which they had only 4 of 21 cafes signing up to offering discount to people who use the cups).
- *Service Clubs.* The Town has a number of Service Clubs, who raise and invest money back into projects which benefit the visitor economy. However, due to historical relationships within council, the relationship with these groups is not as close and collaborative as it has been in the past.

## 2.9.6 Retail

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

## 2.9.7 Product Offering

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

## 2.9.8 Information Bays

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



## 2.10 Visitor Economy Insights

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

The following data sources have been analysed as part of this Situation Analysis:

- **South Australian Tourism Commission (SATC) curated Barossa Regional Profile, Year Ending December 2017**  
The SATC develop regional profiles for all regions across South Australia to offer the most accurate information as it relates to expenditure, number of tourism businesses, international and domestic overnight visitation, and day trip visitation. This data comes direct from the National Visitor Survey (NVS) and the International Visitor Survey (IVS).  
*Data source available online > <https://tourism.sa.gov.au/research-and-statistics/regions/regional-tourism-profiles>*
- **Gawler Visitor Information Centre Statistics**  
Staff at Gawler VIC enter statistics electronically through the till (which they culminate into month and year databases), detailing all visitors through the door, including their place of origin and length of stay.  
*Raw data is available upon request.*
- **Visitor Sentiment**  
Desktop research has been undertaken for key tourism experiences within the TOG to gain insight and gauge visitor perception of the destination.

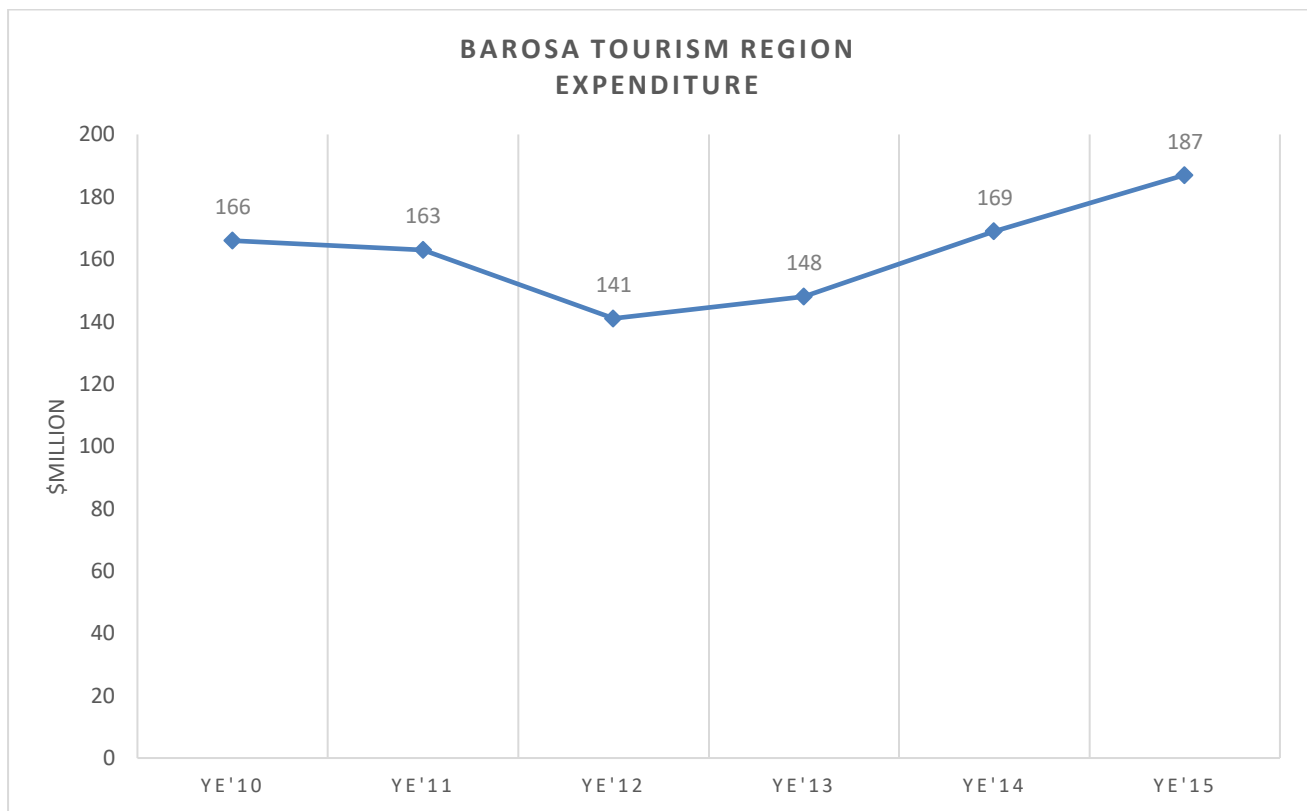
## 2.10.1 SATC Barossa Regional Profile

### Tourism Expenditure

The SATC have reported that the Barossa Tourism Region achieved 70% of its 2020 target (\$273million) reaching \$190million at December 2017<sup>70</sup>.

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

Figure 5 - Barossa Region Tourism Expenditure 2010-2015<sup>71</sup>



The 'Economic Profile of the Barossa Regional Development Australia Region 2016' Report, also highlights that expenditure by tourists (\$51m) contributed approximately 15 per cent of the total value of exports from the region in 2014/15, which also comprised about 1 per cent of the SA total expenditure by tourists in 2014/15 (\$5.3b).<sup>72</sup>

<sup>70</sup> Barossa Regional Profile December 2017 > <https://tourism.sa.gov.au/research-and-statistics/regions/regional-tourism-profiles>

<sup>71</sup> Tourism Research Australia Barossa Regional Profile, 2013-2014 Tourism Supply Raw Data > [https://www.tra.gov.au/tra/2016/Tourism\\_Region\\_Profiles/Region\\_profiles/index.html#](https://www.tra.gov.au/tra/2016/Tourism_Region_Profiles/Region_profiles/index.html#)

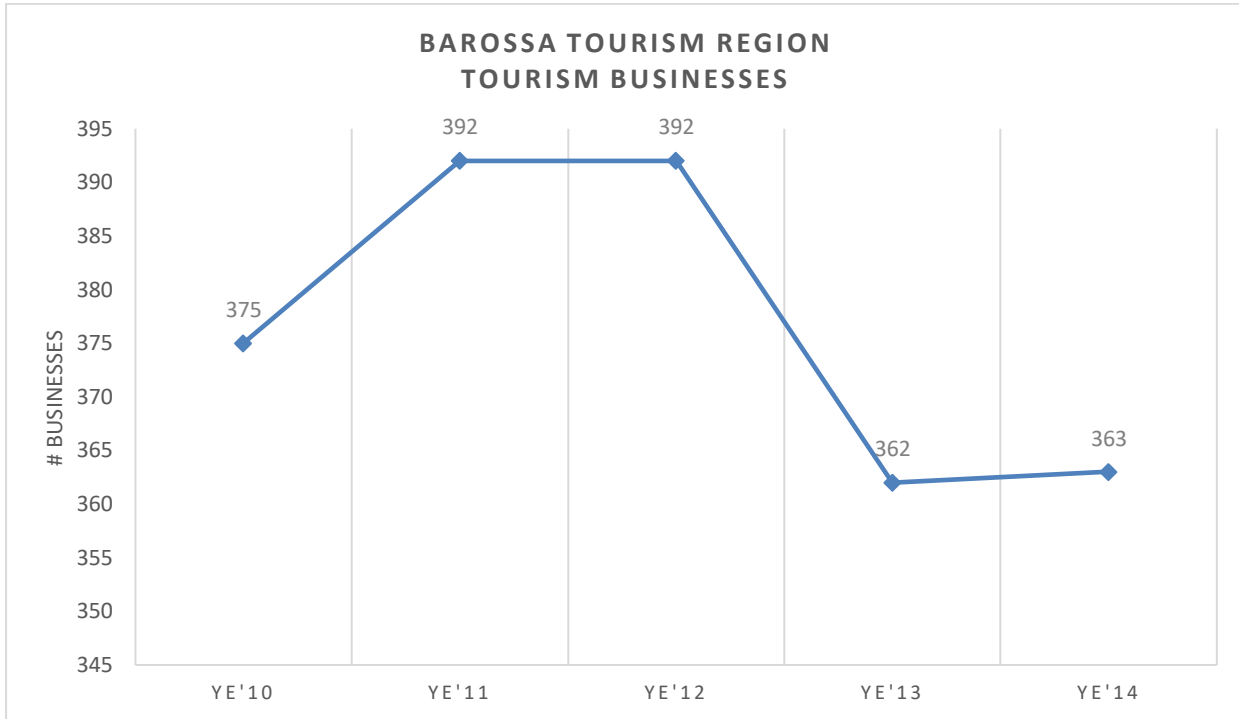
<sup>72</sup> Economic Profile of the Barossa Regional Development Australia Region 2016 (available from RDA Barossa)

## Tourism Jobs + Businesses

In 2016-17, the tourism industry directly employed approximately 900 people, with 500 indirect jobs and a total employment impact of 1,300 people.<sup>73</sup>

In 2013/2014, the Tourism Industry in the Barossa Region supported 363 businesses.<sup>74</sup>

Figure 6 - Tourism Businesses in the Barossa Tourism Region, FY2010-FY2015



<sup>73</sup> SATC Barossa Regional Profile December 2017

<sup>74</sup> Tourism Research Australia Barossa Regional Profile, 2013-2014 Tourism Supply Raw Data

## Visitor Statistics

### Annual Average Visitor Summary December 2015 - December 2017

#### Data highlights:

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

Figure 7 - Barossa Tourism Region Visitation Data Dec 2015 - Dec 2017

ORIGIN					
	Intrastate	Interstate	Total Domestic	International	Total visits
Overnight Visits	124,000	73,000	197,000	12,000	209,000
%	63%	37%	94%	6%	100%
Nights	233,000	222,000	455,000	187,000	642,000
%	51%	49%	71%	29%	100%
Average Length of Stay	2	3	2	16	3
Domestic Day Trips					828,000
International Day Trips*					84,000
PURPOSE					
	Holiday	VFR	Business	Other	Total
Overnight Visits	112,000	70,000	19,000	8,000	209,000
%	54%	33%	9%	4%	100%
Nights	319,000	187,000	41,000	95,000	642,000
%	50%	29%	6%	15%	100%
Average Length of Stay	3	3	2	12	3
Expenditure					
Average Annual Expenditure					190,000,000

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

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

## Barossa Region Tourism 'Appeal' Insights

Below are the results from Consumer Surveys conducted by SATC and Tourism Australia<sup>75</sup> and is available in the Barossa Regional Profile

### *Interstate*

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

### *Intrastate*

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

### *Regional Visitor Strategy Priorities*

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

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

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<sup>75</sup> SATC Barossa Regional Profile December 2017

## 2.10.2 Gawler VIC Visitor Statistics

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

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

### Visitor Data Highlights<sup>76</sup>

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

Figure 8 - Gawler VIC, Total Visitors Serviced (in person + phone)

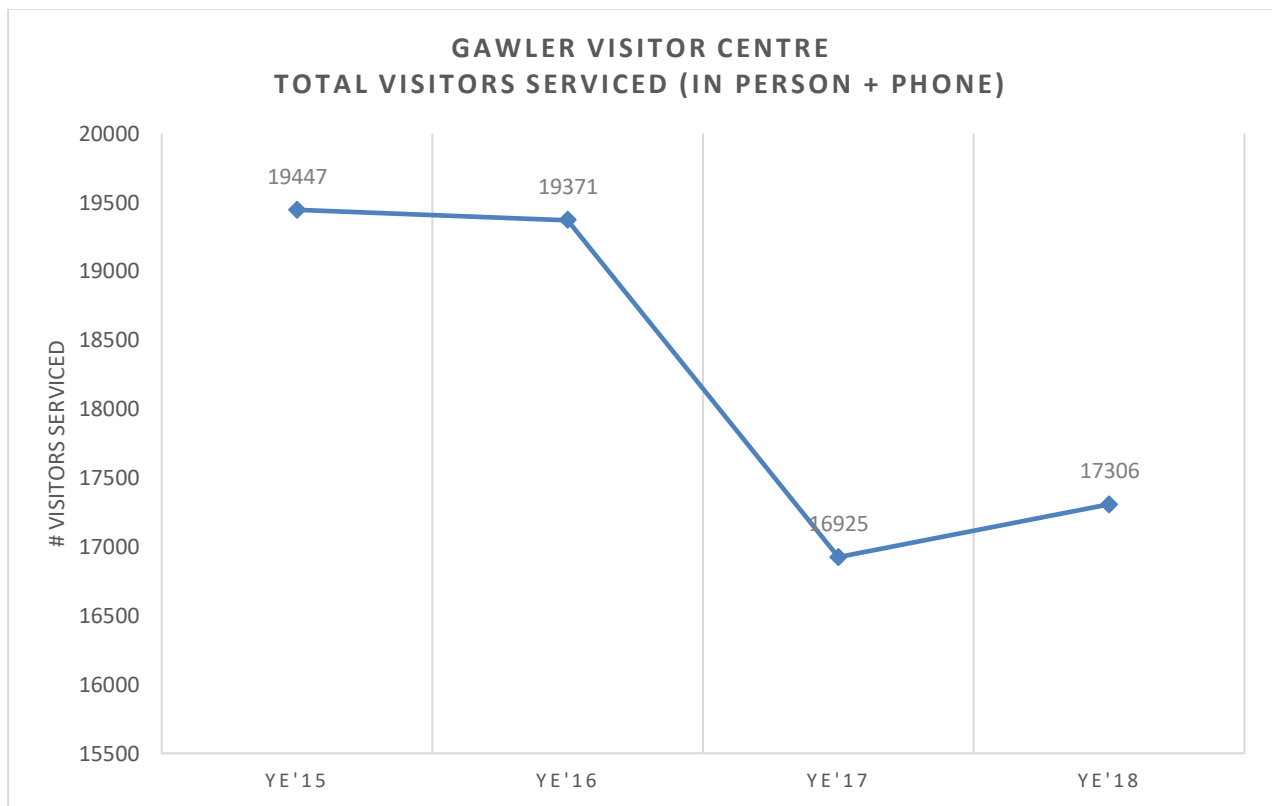


Figure 9 - Gawler VIC, Total Domestic Visitors vs Total International YE2015-YE2018

<sup>76</sup> Visitor Data received from Gawler Visitor Information Centre Manager, March 2019

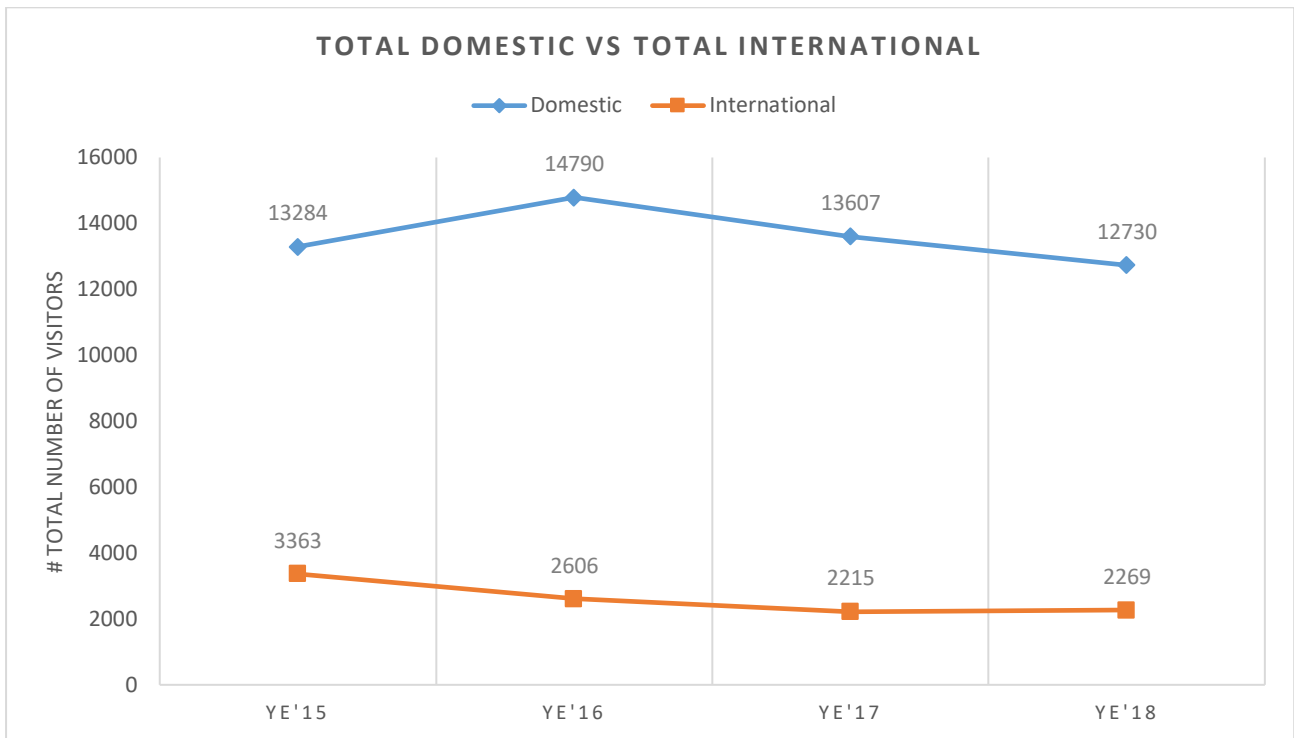


Figure 10 - Gawler VIC, All Market Comparison, YE2015-YE2018

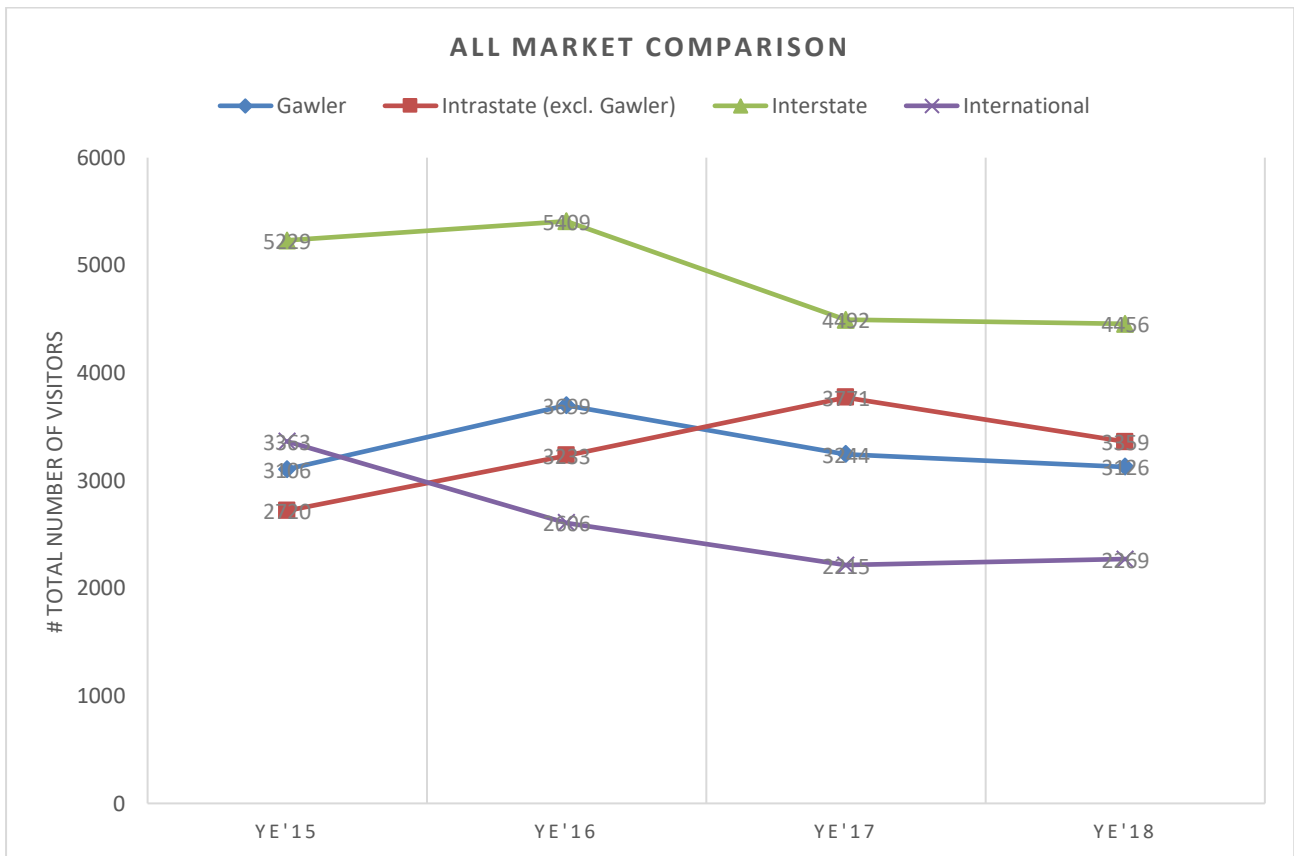


Figure 11 - Gawler VIC, Interstate Visitor Profile YE2015-YE2018

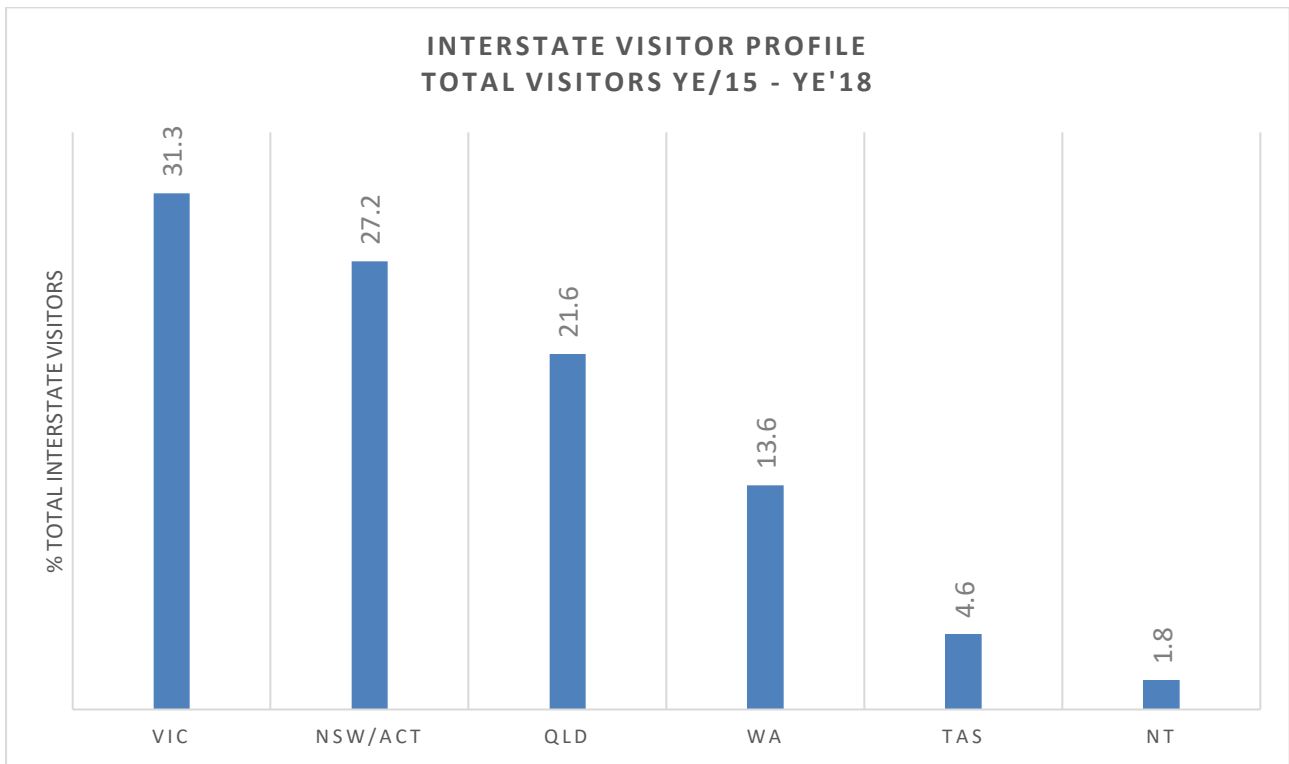
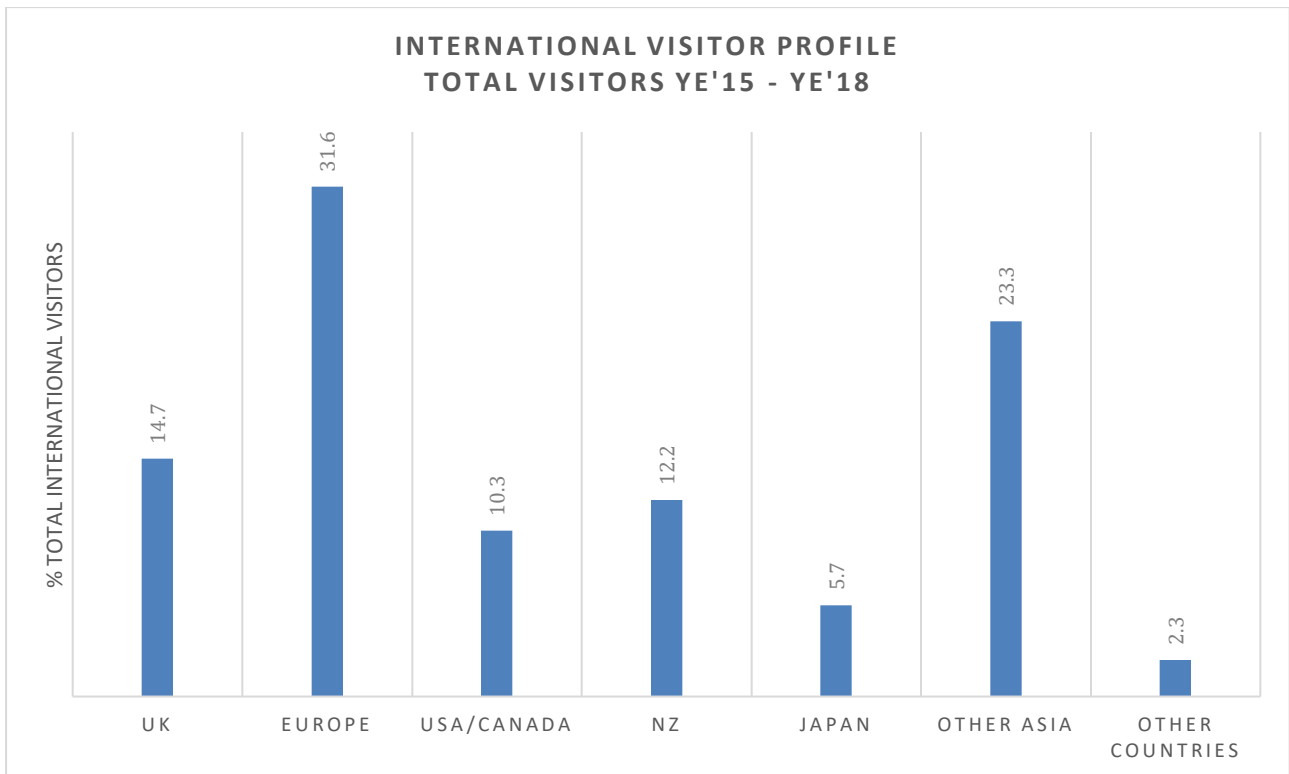


Figure 12 - Gawler VIC, International Visitor Profile YE2015-YE2018





## 2.10.3 Visitor Sentiment

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

Overall, sentiment for the Council owned assets are very high (mostly 4 star), and comments regarding the assets are very positive, with only a few negative comments.

**Table 5 - Digital Visitor Sentiment for Key Tourism Experiences in TOG**

Product / Experience	Product Category (Activity / Attraction)	Tripadvisor		Google		Instagram	
		# Reviews	Star Rating	# Reviews	Star Rating	#Hashtag	# Hashtag Uses
Gawler Visitor Information Centre	Attraction	27	4.5	44	4.5	#gawlervisitorinformationcentre	2
Pioneer Park	Park / Attraction	10	4.5	51	3.9	#pioneerparkgawler	1
Jack Bobridge Trail	Activity			5	2	#jackbobridgetrail #jackbobridgetrack #jackbobridgebikepath	70
Stuart O'Grady bikeway	Activity	3	4.5	4.4	22	#stuarTOGradybiketrack #stuarTOGradybikeway	34
Gawler Main Street Walking Tour	Activity	1	5				
Gawler Train Station	Attraction	2	4	20	4.2		
St George's Anglican Church	Attraction	3	4.5	3	3.7		
Gawler Lions Station Market	Event	2	3.5	35	4	#gawlerfarmersmarket #gawlermarkets #gawlermarket	223
Deadman's Pass Reserve	Attraction			136	4.4	#deadmanspassgawler	16
Gawler Self-Drive Tour	Activity	2	4.5				
Apex Park	Attraction			101	4.4	#apexparkgawler	1
Light Square	Park			1	3		
Clonlea Park	Park			132	4.5	#clonleapark	154
Gawler Caravan Park	Accommodation	37	4.5	105	4.1	#gawlercaravanpark	3
Paridla Taikondi Park	Park			16	4.5		
Clonlea Reserve Dog Park	Park			18	4.8		
Gawler Skate Park	Park			16	4.2		
Gawler National Trust Museum	Attraction			2	2.5		
Gawler Community Gallery	Attraction			2	4.5	#gawlercommunitygallery	5

## 2.11 Macroeconomic Environment

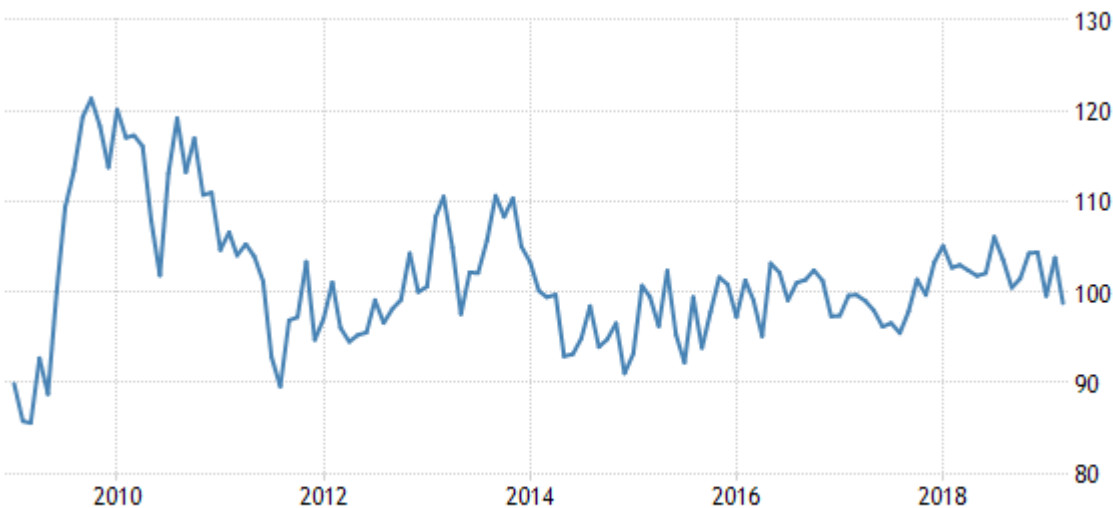
There are many macro environmental factors impacting local, national and global visitor economies. Although the influence on these variables are outside the control of the TOG, destinations can, to some extent, adapt to changing circumstances. Below are several elements in the macro environment that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

### 2.11.1 Consumer Confidence

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

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

Figure 13 - Consumer Confidence Index, 2009-2019<sup>77</sup>



SOURCE: TRADINGECONOMICS.COM | WESTPAC BANKING CORPORATION, MELBOURNE INSTITUTE

<sup>77</sup> Trading Economics, Consumer Confidence Index, 2008-2018 > <https://tradingeconomics.com/australia/consumer-confidence>

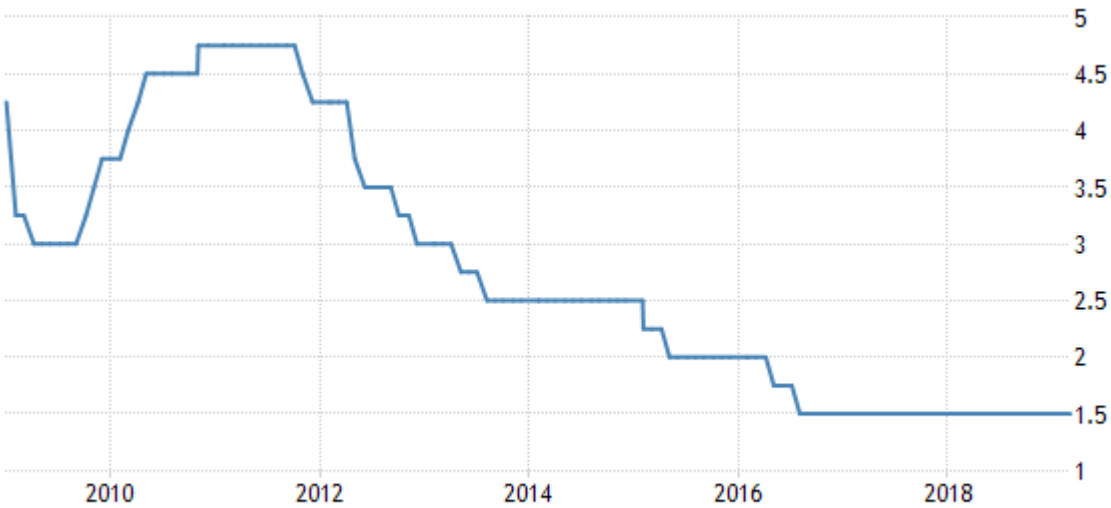
## 2.11.2 Interest Rates

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

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

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

Figure 14 - Australian Interest Rate Index, 2009-2019<sup>78</sup>



SOURCE: TRADINGECONOMICS.COM | RESERVE BANK OF AUSTRALIA

<sup>78</sup> Trading Economics, Australian Interest Rate Index, 2008-2018 > <https://tradingeconomics.com/australia/interest-rate>

### 2.11.3 Exchange Rates

The Australian dollar has had something of a turbulent recent history. Fluctuating frequently, in January 2016 it reached a low of 0.69 against the USD. Since then it has been slowly rising (with persistent peaks and troughs), until, in July and September 2017, it was valued at above 0.80 to the USD<sup>79</sup>

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

Figure 15 - AUD / US Exchange Rate History, 2009-2019<sup>80</sup>



<sup>79</sup> Trading Economics, Australian Interest Rate Index, 2008-2018 > <https://tradingeconomics.com/australia/currency>  
<sup>80</sup> Trading Economics, Australian Interest Rate Index, 2008-2018 > <https://tradingeconomics.com/australia/currency>

## 2.11.4 Travel Forecasts

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

### Global

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

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

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

The overall picture of the world economy remains positive.<sup>81</sup>

### National

#### *International Travel*

- International visitor numbers to Australia are expected to increase 13.1%, from 8.6 million in 2016–17 to 9.2 million in 2017–18 and 9.7 million in 2018–19. Asia will continue to outperform other overseas markets over this period, brought about by increasing prosperity and the continuing transition of millions of people into consumer oriented, middle-class populations.<sup>82</sup>
- Traditional markets (UK, USA, NZ) will still see moderate growth but not as strong and consistent as the Asian markets.<sup>83</sup>
- The growth Australia is experiencing is the fastest in a generation and is seeing it outpace both global performance and travel across the Asia Pacific. In fact, international visitation to Australia is growing at nearly three times the rate of global travel.<sup>84</sup>

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<sup>81</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>

<sup>82</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>

<sup>83</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>

<sup>84</sup> Deloitte Access Economics' latest Tourism and Hotel Market Outlook report > <https://www.hotelmanagement.com.au/2017/02/23/deloitte-report-tourism-sector-remains-shining-light-australian-economy/>

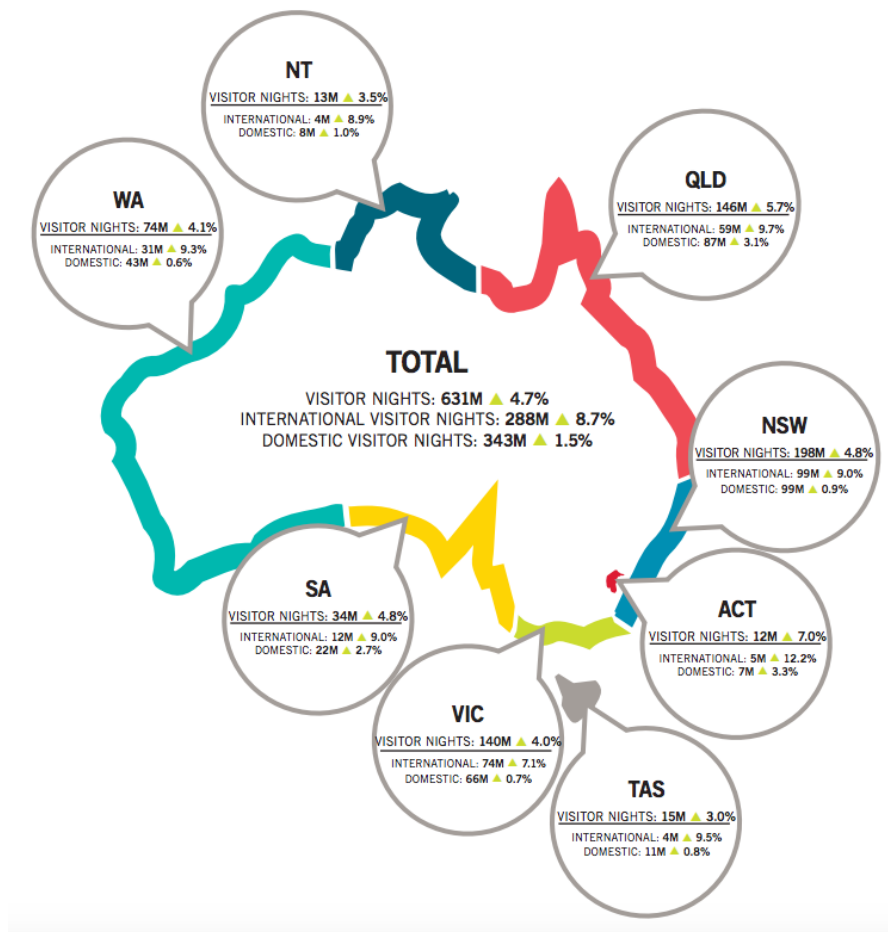
### Domestic Travel

- In 2017-2018, Australian economic growth is expected to remain at below its historical average, and where discretionary expenditure may be reined in by slower growth in capital city house prices (particularly in Sydney and Melbourne) and by sluggish wage growth.<sup>85</sup>
- However, as economic growth picks up through 2018–19, and the Australian dollar remains near its long-term average, there will be a commensurate increase in domestic tourism activity.<sup>86</sup>

### South Australia - State

South Australia has been identified as one of the top 4 States in Australia forecast to see the most growth in 2017-2018, with total visitor nights increasing 4.8% over the year to 34 million nights; the result of a 2.7% increase in domestic nights and a 9.0% increase in international nights<sup>87</sup>.

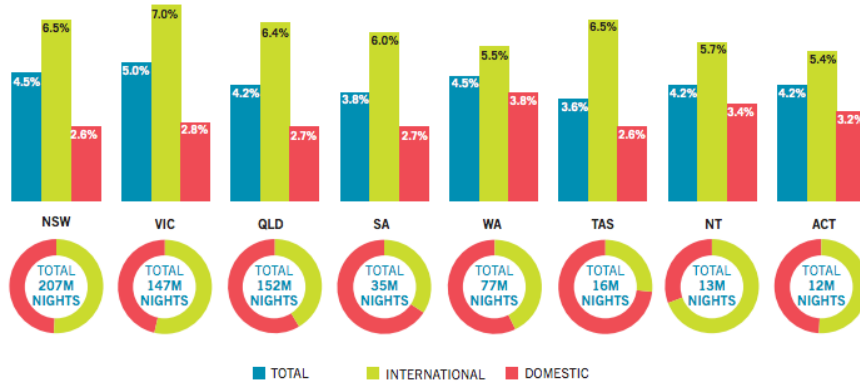
Figure 16 - South Australian Tourism Growth 2017-2018



However, state growth will slow down over 2018-2019 to 3.8% (down 1%) due to a decrease in international visitation (down 3%), while the domestic market remains steady at 2.7% growth.<sup>88</sup>

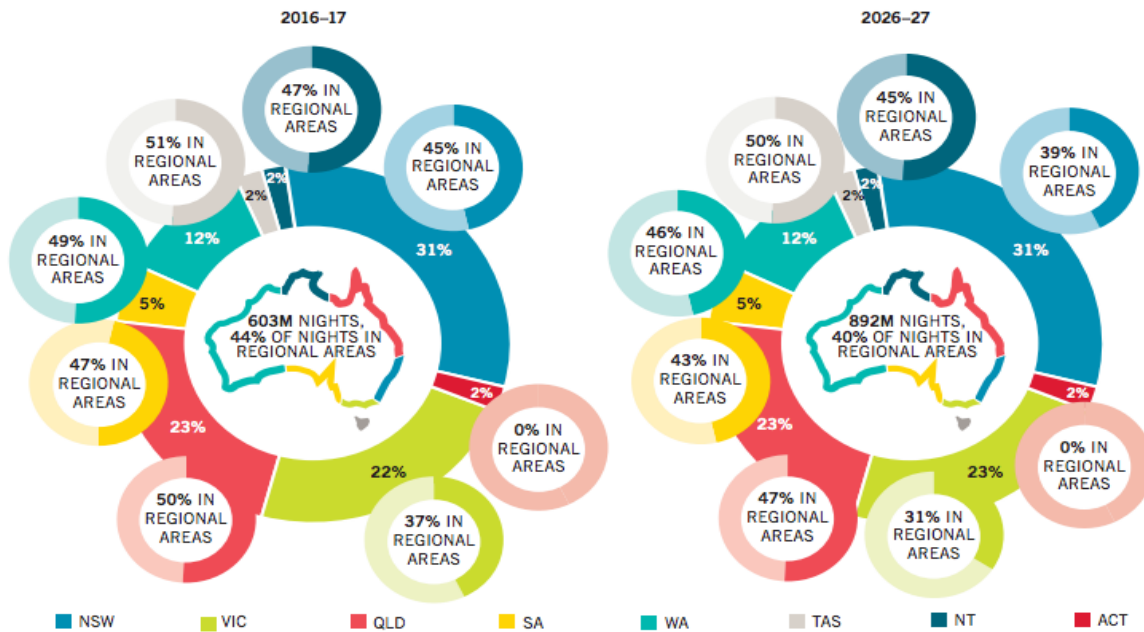
<sup>85</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>  
<sup>86</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>  
<sup>87</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>  
<sup>88</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>

Figure 17 - South Australian Tourism Growth 2018-2019



Ten year forecast data also indicates that regional tourism’s share of South Australian visitor nights is expected to decrease from 47% to 43% between 2016–17 and 2026–27, a trend that consistent with all regions in all states in Australia.<sup>89</sup>

Figure 18 - South Australian Regional Dispersal Forecast 2016-2017 -> 2026-2027



<sup>89</sup> TRA Travel Forecasts 2017 > <https://www.tra.gov.au/ArticleDocuments/257/Tourism%20Forecasts.pdf.aspx?Embed=Y>

# 3. SWOT ANALYSIS

Throughout the consultation process (ref. section 5) strengths, challenges and threats for the Town were identified. Below is a snapshot of the consistent themes that were discussed, all of which will be addressed in the Strategy and Action Plan.

**Table 12: Strengths, Challenges + Threats for Tourism in the Town of Gawler**

STRENGTHS	WEAKNESSES / CHALLENGES	THREAT
<p><b>Tourism Forecasts</b></p> <ul style="list-style-type: none"> <li>Positive growth expected for South Australian Tourism Economy (see SA Visitor Economy Strategy)</li> <li>Cycle Tourism growing in South Australia</li> </ul> <p><b>Elected Membership &amp; Administration</b></p> <ul style="list-style-type: none"> <li>Council recognise the value of visitor economy and cycle visitors</li> </ul> <p><b>Stakeholders</b></p> <ul style="list-style-type: none"> <li>Active and passionate cycling advocates in town (Gawler Wheelers, Elected Members and community)</li> </ul> <p><b>Natural Beauty</b></p> <ul style="list-style-type: none"> <li>Quintessential South Australian town, Main Street Buildings, picturesque rivers and parks, heritage buildings (including many pubs)</li> </ul> <p><b>Infrastructure</b></p> <ul style="list-style-type: none"> <li>Cycle Trails - Stuart O’Grady Bikeway (from Northern Adelaide), Jack Bobridge Track (to Barossa) and River Trails (around town)</li> </ul>	<p><b>Regional</b></p> <ul style="list-style-type: none"> <li>Population growth, increased traffic pressure/congestion around TOG.</li> </ul> <p><b>Elected Membership &amp; Administration</b></p> <ul style="list-style-type: none"> <li>Lack of dedicated Tourism and Events resource in Council – limits ability to address many of the outlined Marketing and Visitor Servicing Challenges</li> <li>Lack of strategic communications plan for both Residents and Visitors</li> </ul> <p><b>Visitor Experience</b></p> <ul style="list-style-type: none"> <li>Lack of Visitor Experiences (outside of Heritage products)</li> <li>Deficiency of vibrant retail/food/dining offerings in Gawler Main Street and surrounding park precincts</li> <li>Under-investment of private tourism enterprises</li> <li>Lack of activation in Heritage experiences (including Museum opening hours + experience)</li> <li>Apathy by local businesses to visitor economy (lack of understanding/too busy in own business/opening hours)</li> <li>Lack of size and range of accommodation types (large groups or higher end visitors not catered for in TOG)</li> <li>Lack of size and range of events to tell the Town’s stories and attract relevant visitor groups</li> <li>Limited night-time experiences other than pubs</li> </ul> <p><b>Cycle Specific Visitor Experience</b></p> <ul style="list-style-type: none"> <li>Lack of clear, safe and enjoyable trail connections/transits between SOB, JBT, River Trails, Gawler Bike Hub and Train stations</li> </ul>	<p><b>Strategy</b></p> <ul style="list-style-type: none"> <li>Plans are developed and actions not implemented</li> </ul> <p><b>Natural Assets</b></p> <ul style="list-style-type: none"> <li>Urban sprawl will impact the visual beauty, hills, heritage and river landscapes of the town</li> <li>Natural disasters – floods, bushfires</li> <li>Climate change trending longer periods between rain events, causing dry rivers.</li> </ul> <p><b>Consumers</b></p> <ul style="list-style-type: none"> <li>Changes in consumer confidence, interest rates and exchange rates</li> </ul> <p><b>Stakeholders</b></p> <ul style="list-style-type: none"> <li>Loss of Cycle Champions from town/council</li> <li>Change in State Government and/or SATC staff and marketing investment / product development</li> </ul> <p><b>History Preservation</b></p> <ul style="list-style-type: none"> <li>The heritage and cultural aspects of Town of Gawler are a unique selling point and if these are not preserved/captured for successive custodians they will be lost</li> </ul> <p><b>Competition</b></p>



<ul style="list-style-type: none"> <li>Gawler Bike Hub - showers/toilets/water/secure storage/bike hire</li> </ul> <p><b>Access</b></p> <ul style="list-style-type: none"> <li>Proximity to Barossa wine region, as well as surrounding tourism regions (Adelaide, Adelaide Hills, Clare Valley)</li> <li>Easily accessed from Adelaide by road and rail</li> <li>Cycle connectivity - from Adelaide via train (bring bike) or SOB and from Barossa via JBT.</li> </ul> <p><b>Visitor Servicing</b></p> <ul style="list-style-type: none"> <li>Professionally run VIC with knowledgeable VIC staff</li> <li>Good relationships with Kapunda and Adelaide Visitor Centres (referral traffic)</li> </ul>	<ul style="list-style-type: none"> <li>Cyclist Safety - cycle lanes end abruptly, unconnected trails/confusing/unclear trail connections, very busy traffic around main street, maintenance of trails (debris/glass), dogs off leashes putting cyclists on trails at risk.</li> <li>Cycle Culture - Gawler not very cycle friendly (not a strong culture of locals riding), limited welcome to cyclists to town, lack of cycle friendly cafes and restaurants.</li> <li>Lack of visitor experience at Gawler Cycle Hub - no cafe/restaurant</li> <li>Lack of experiences along cycle trails. JBT – no key stops till Lyndoch (and it’s uphill). SOB – straight and boring – no start/finish experience. River Trails – pretty but no food/wine/experiences other than Main Street.</li> </ul> <p><b>Brand and Marketing</b></p> <ul style="list-style-type: none"> <li>Lack of awareness and advocacy of what to see and do around town (locals, wider industry, visitors)</li> <li>Unclear/unknown town brand - is it part of Barossa? Is it part of Adelaide?</li> <li>No strategic or coordinated approach to marketing Gawler to visitors</li> <li>Lack of customer profiling to identify what experiences in town will attract different customer profiles</li> <li>Perceived as pass through town on way to Barossa/Flinders Ranges</li> <li>Lack of clarity and coordination in economic development in Gawler for different areas of marketing in the town (VIC/GBDA)</li> <li>Lack of funds to invest in marketing and product development</li> <li>Limited marketing support from Tourism Barossa (although TOG do not fund TBI)</li> <li>Lack of awareness of cycle trails and bike hub (locals and visitors)</li> <li>Lack of unified cycle maps and cycle trail itineraries for visitors cycling to/around town and Barossa/Adelaide</li> </ul> <p><b>Planning, Infrastructure, Placemaking + Public Assets</b></p> <ul style="list-style-type: none"> <li>Signage - lack of clear signs connecting cycle trails, wayfinding around town (inc train stations), main highway tourist signs, welcome to town</li> <li>Lack of trail connection between SOB, JBT, River Trails, Train Station, Bike Hub</li> <li>Cyclist support services - Lack of public toilets, bike repair, shelter, signs, water on trails (SOB) as well as bike racks around town</li> <li>Train Stations - Poor sense of welcome and placemaking</li> <li>Grading of rides - doesn’t existing (easy/medium/hard)</li> <li>Parking - in Main Streets especially RV and Caravan Visitor, at Cycle Trails for cyclists to leave bikes</li> <li>Traffic congestion around Main Street and town centre (poor cycle experience)</li> </ul>	<ul style="list-style-type: none"> <li>Popularity of other cycling destinations offering a diverse experience for visitors and cycling abilities</li> </ul> <p><b>Visitor Experience</b></p> <ul style="list-style-type: none"> <li>Limited visitor experience in TOG: If visitors have a poor-quality experience (either cycle or no cycling visitor) then they are unlikely to return and further highly trusted word of mouth marketing (social media/review websites etc) may discourage many more to not bother.</li> </ul>
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**Visitor Information + Servicing**

- Lack of strategic leadership for Gawler VIC
- Volunteer culture reactive not proactive customer service and sales
- Gawler VIC retail product not reflective of best practice visitor centre retailing (unique/local/interesting retail offerings)
- Lack of referrals from neighbouring VIC, including Barossa
- Lack of visitor information available online about what to see/do in TOG
- Lack of online bookability by the Centre, creating manual and slow booking system, which receives negative feedback from industry.
- Lack of strong relationship between Gawler VIC tourism operators outside core accommodation offering
- Lack of understanding of best practice visitor servicing and dated visitor servicing mindset the “Visitors must come to Visitor Centre” to get visitor guides and maps

Below is a list of high-level opportunities for implementation over the short, medium and long term as outlined in the Action Plan.

**Table 13: Opportunities for Town of Gawler - Wider Visitor Economy and Cycle Specific**

<b>OPPORTUNITIES</b>	
<p><b>Strategy</b>  <i>Ensure the support of TOG's new Cycle Tourism Plan, and its strategic implementation, measurement and review.</i></p>	<ul style="list-style-type: none"> <li>• Resourcing - Realignment/redistribution of TOG council resources to enable recruitment of relevant resources to implement this plan.</li> <li>• Strategy alignment by GBDG with this new Plan, reflected in their activities</li> <li>• Cycle Tourism Plan Measurement - Identify and implement sustainable data sources to measure success of Cycle Tourism Plan.</li> <li>• Annual Reporting - Report on Plan objectives annually to relevant stakeholders</li> </ul>
<p><b>Brand + Positioning</b>  <i>Ensure clarity with all Tourism and Cycle Stakeholders on how to activate the Town's brand stories.</i></p>	<ul style="list-style-type: none"> <li>• Develop TOG centric visitor messaging aligned for customers identified in the Plan</li> <li>• Develop consistent storylines to be used when promoting the wider visitor experience and specific Cycle experience in TOG</li> <li>• Educate industry on how to leverage Gawler brand stories</li> </ul>
<p><b>Stakeholders</b>  <i>Support and strategically leverage stakeholders who help grow the wider visitor economy and cycle tourism in TOG</i></p>	<ul style="list-style-type: none"> <li>• Establish MOU's with relevant stakeholder organisations to clearly outline roles and responsibilities of each party to ensure long term strategic focus on the visitor economy + cycle tourism (eg. Gawler Business Development Group, Gawler Wheelers, NTSA Gawler, RDA Barossa, Tourism Barossa)</li> <li>• Annual review of support and outcomes from each organisation, continue to support/activate relevant opportunities and projects as it relates to the new Cycle Tourism Plan</li> <li>• Industry Education - Cycle Tourism Plan communication schedule developed and implemented to educate all Stakeholders (Elected Members, Residents, Tourism Operators + Local Business) on the relevant opportunities for each group.</li> </ul>
<p><b>Visitor Experience</b>  <i>Ensure the wider visitor experiences as well as cycle experience in the TOG is of a high standard, to attract the Town's Ideal Customers and encourage advocacy of the Town.</i></p>	<p><b>Product Development</b></p> <ul style="list-style-type: none"> <li>• Build Visitor Experience in Gawler – focusing on its strengths, which are Heritage/Trails/Parks/Location to Barossa.</li> <li>• Advocate for Heritage Experience developments within the town (by TOG/NHTSA Gawler/other government supported organisation or private industry), via relevant grant funding programs/experience development/interpretation/tours etc.</li> <li>• Advocate for the development of the Food and Dining experience with the town and in key cycle trail locations, such as via Mobile Food Vendors</li> <li>• Professional development for industry stakeholders in best practice marketing and visitor experience</li> <li>• Advocate for the attraction of private investment into larger scale accommodation offerings</li> <li>• Industry Engagement by TOG, to connect them with opportunities to grow their businesses (eg. TBI membership, marketing up skilling, ATDW)</li> </ul> <p><b>Events</b></p> <ul style="list-style-type: none"> <li>• Audit all community and tourism events and align to Cycle Tourism Plan customer segments.</li> <li>• Identify new event opportunities to support customers and niche segments</li> <li>• Support events in marketing plan</li> </ul> <p><b>Development Policy</b></p> <ul style="list-style-type: none"> <li>• Work with State Government to review relevant policies to ensure they support Tourism and Cycle development.</li> </ul> <p><b>Funding</b></p> <ul style="list-style-type: none"> <li>• Identify and apply for relevant grants to activate TOG wider tourism projects + cycle specific projects</li> </ul>

	<ul style="list-style-type: none"> <li>• Connect relevant Private Enterprise with relevant grant opportunities</li> </ul> <p><b>Cycle Specific Visitor Experience</b></p> <p><b>Customer Niches</b></p> <ul style="list-style-type: none"> <li>• Activate Young Riders - Skills park for learners, pump track, learn to ride programs, ride to school programs</li> <li>• Activate/develop trails/existing assets to attract MTB riders</li> </ul> <p><b>Industry Engagement</b></p> <ul style="list-style-type: none"> <li>• Gawler Wheelers - Expansion of ride program (MTB, Kids, School), Marketing MOU</li> <li>• Bike Friendly Businesses Program - encourage more cycle friendly services + culture in the Town</li> <li>• Bike SA - Leverage their many programs to grow Cycling culture, touring programs and events in TOG</li> </ul> <p><b>Cyclist Safety</b></p> <ul style="list-style-type: none"> <li>• Improve Safety - education of dog owners of risk of dogs off leash on trails</li> </ul> <p><b>Product Development</b></p> <ul style="list-style-type: none"> <li>• Activate the experiences at the Gawler Cycle Hub and Clonlea Park – such as food/dining option</li> <li>• Support inclusion of TOG in Adelaide Wine Capital Cycle Trail</li> <li>• Cycle Specific Events, Family Friendly + Learn to Ride</li> <li>• Advocate for cycle Retail Shop/Bike Mechanic in Town Centre/Near Bike Hub.</li> <li>• Bike Hire. Expand on current bike hire to include eBikes at VIC/accommodation/key locations around Town.</li> </ul> <p><b>Development Policy</b></p> <ul style="list-style-type: none"> <li>• Work with property developers to ensure Cycle trail connectivity into TOG’s existing cycle trail network.</li> </ul>
<p><b>Infrastructure</b></p> <p><i>Ensure wider visitor infrastructure and cycle specific infrastructure is available where required and maintained to a high standard to support the positive advocacy of the region.</i></p>	<p><b>Cycle Trails</b></p> <ul style="list-style-type: none"> <li>• Activate Cycle Trail Networks, as per the actions in the TOG Cycle and Walking Plan 2018 – 2028, including connection of JBT, SOB and River Shared Path Network into the Bike Hub and Town Centre, ideally off-road.</li> <li>• Bike Trail infrastructure - Water/Repair Stations/Toilets/Parking/Bins at start/end etc on Trails (toilets and water noted on SOB)</li> <li>• Bike Trail Visitor Experience + Safety - off-road connect to Town Centre/Bike Hub for all trails, not having cycling lanes merge into dangerous busy roads, widening of verges to allow room for cyclists, education of dog owners about keeping dogs on leashes</li> <li>• Maintenance Plan Developed for current trails to ensure they remain at a high standard. Stakeholder feedback around removing sticks/leaves from trails/revegetation on verges.</li> <li>• Investigate the potential to develop MTB Network of Trails - Activate new/existing trails - Dead Man’s Pass, Clonlea Park, Skills Park, including linking all Trails with "off-road" separate paths using railway reserve, Electranet easement, Cheek Ave (eastern side) verge.</li> </ul> <p><b>Signage + Information Bays</b></p> <ul style="list-style-type: none"> <li>• Signage - network of well-marked cycle trails paths around town (reflected also on visitor guides and maps). Way-finding from SOB/JBT into VIC/town/Railway Stations, and around to linear trails, uniform colours for ease of understanding - used across all visitor touch points.</li> <li>• Trail Ability Grading – to allow people to choose rides based on their cycling ability.</li> </ul> <p><b>Placemaking</b></p>

	<ul style="list-style-type: none"> <li>• Ensure Visitor Economy projects/impacts considered as part of Town Centre Framework</li> <li>• Further Activation of Gawler Main Street as visitor experience</li> <li>• Improve welcome and visitor information at Gawler Central and Gawler Railway Station (liaise with DPTI RailCare program)</li> <li>• Increased bike parking in Gawler Main Street</li> <li>• Bike Repair Stations (eg. Gawler VIC)</li> </ul> <p><b>Car Parking</b></p> <ul style="list-style-type: none"> <li>• Improve parking options for RV/Caravan travellers in Town centre</li> <li>• Provide more secure car parking at cycle trail heads for cyclists</li> </ul>
<p><b>Marketing, Communications + Visitor Servicing</b></p> <p><i>Communicate the right stories on the right channels to increase engagement prior to travel to attract the identified Ideal Customers, and provide the right visitor information, to the right visitor, at the right location to drive demand and increased length of stay in TOG .</i></p>	<p><b>Marketing</b></p> <ul style="list-style-type: none"> <li>• Develop, implement and report on a Marketing Plan annually to drive demand of the Town’s identified Ideal customers and niche segment groups around key visitor experiences (including cycling) via relevant marketing channels and tactics</li> <li>• Marketing support for relevant community and TOG managed visitor experiences</li> <li>• Photoshoot for key TOG visitor experiences</li> <li>• New destination website specifically promoting cycle experience in Gawler (eg <a href="http://www.visitgawler.com.au">www.visitgawler.com.au</a>), while in short term increase information and inspirational information about TOG for cycling visitors and identified customer niches on current council website.</li> <li>• Cycle specific marketing opportunities - promotion of Gawler as a cycle hub to explore surrounding regions, promotion of cycle hub + hire facilities, promotion of experiences on cycle trails, advocacy/partnership with passionate cyclists in TOG</li> <li>• Advocacy Plan Developed – for residents, local businesses, cyclists, consolidation of user generated hashtags</li> </ul> <p><b>Visitor Servicing</b></p> <ul style="list-style-type: none"> <li>• Visitor Collateral overhaul – review, consolidate, update existing visitor collateral, including distribution strategy.</li> <li>• Cycling Specific Visitor Collateral - Publish/distribution of Paul Koch Cycle Paths book (print/online), simplify and streamline TOG Town Map to include cycling trail sand itineraries on the back (currently 3 required when riding in TOG)</li> <li>• Development of Strategic Plan for GVIC– driving best practice visitor servicing tactics (on and offline visitor servicing), review and simplify Participation Agreement, industry engagement activities, industry famils, partnerships with surrounding VICs, collateral development + distribution, customer service standards</li> <li>• Provision of online booking system for GVIC</li> </ul>

# 5. ACKNOWLEDGEMENTS

The Town of Gawler Situation Analysis (April 2019) has been developed through extensive consultation with key tourism stakeholders across community, industry, business and government. Stakeholder input to the Cycle Tourism Plan was gathered through the following sources during February - March 2019:

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

**Table 14: Cycle Tourism Stakeholder Engagement Summary**

Local and State Government	Industry	Local Community
<ul style="list-style-type: none"> <li>• Town of Gawler Council staff + elected members (including Visitor Centre)</li> <li>• Barossa Council (Via Barossa Visitor Information Centre Manager)</li> <li>• Light Regional Council</li> <li>• South Australian Tourism Commission</li> </ul>	<ul style="list-style-type: none"> <li>• Gawler Business Development Group</li> <li>• Bicycle SA</li> <li>• Barossa Tourism</li> <li>• Regional Development Australia Barossa</li> </ul>	40 + Local Residents, Business Owners and Tourism Providers in the town

The development of the Situation Analysis, management and execution of the stakeholder engagement was conducted by Rebecca White and Paige Rowett, Directors, Tourism eSchool ([www.tourismeschool.com](http://www.tourismeschool.com)).

# 6. REFERENCES

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

- Australian Wine Capital Cycle Trail, October 18
- Barossa Region Cycle Tourism Strategy 2017
- Economy.ID
- Establishing the Adelaide Mount Lofty Ranges Region as an international mountain bike destination, July 15
- Gawler Arts and Culture Strategy 2016 – 2025
- Gawler Business Development Group Inc 2 Yr Report 2016-2017 2017-2018
- Gawler Business Identity Session, April 17
- Gawler Invest
- Gawler Town Centre Parking Strategy Report 2017-2020
- Gawler TDU Bid Media Coverage, Bunyip Press, Feb 19
- Gawler Urban Rivers Master Plan
- RDA Barossa Regional Action Plan + Economic Priorities
- Regional Heritage Strategy 2014 – 2020
- SA Bike Economy Industry Roundtable Nov 17
- SA Recreational Trails 10 Year Masterplan 2015-2025
- South Australia Visitor Economy Sector Plan 2030 – Draft for Industry Feedback
- The South Australian Bike Economy
- Tourism 2020
- Tourism Australia International Marketing Profiles
- Tourism Australia Market Profiles
- Tourism Barossa Membership Prospectus (2018)
- Tourism Barossa Strategic Plan 2017 - 2018
- Tourism Research Australia (TRA)
- Town of Gawler Community Plan 2017 - 2027
- Town of Gawler Walking and Cycling Plan 2018 – 2028