

TO:
Flinders Ranges and Outback Tourism SA
Outback Working Party

“HOW CAN THE OUTBACK
BENEFIT FROM AND PROMOTE
TOURISM IN THE REGION
WHEN LAKE EYRE IS DRY?”

ISSUES AND OPPORTUNITIES PAPER

MAY 2012

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EXECUTIVE SUMMARY

With a view to informing the Flinders Ranges and Outback SA Tourism Association (FROSAT) Outback Working Party (OWP) on the question 'How can the Outback benefit from and promote tourism in the region when Lake Eyre is dry?' this research project was initiated and conducted in early 2012 (following 3 consecutive wet Lake Eyre events that brought extra tour operators into and exposed new markets to the region).

Funded by the South Australian Tourism Commission's (SATC) Destination Development Fund the outcome was to be an 'issues and opportunities paper', (focusing as much as possible on identifying practical and achievable ways forward), available for consideration and discussion by industry. Research concentrated on operator and key stakeholder responses to survey questions in the areas of 'experiences', 'infrastructure' and 'marketing'.

Key research findings included;

Experiences – the region is strong in *outback, nature and journey* experiences but weak in *aboriginal and food & wine* experiences. People come to the region to encounter nature, visit Lake Eyre, traverse the historic tracks, bush-camp and experience isolation, and discover outback pioneers, culture and characters. A lack of on-ground product, the need for improved customer service, and expanded food & accommodation offerings; to cater for higher visitor numbers and the needs of new markets brought by wet Lake Eyre events, was identified.

The proposed solution to most effectively and efficiently address some of these issues/opportunities is to concentrate on *building the capacity* of and *diversification opportunities* of people/businesses/communities already operating in the region, i.e. work with existing assets rather than focus on attracting new operators. In particular, increasing business engagement in accessing existing business development services is paramount.

Opportunities to build the shoulders of the season with a focus on the 4WD adventure market (self-drive and tours) are highlighted, e.g. crossing the Simpson Desert experience (currently short June-July-August busy season).

Infrastructure – Despite ‘road issues’ featuring strongly as a general issue there was little consistency in ‘what needs to be done’ from respondents. It was deduced that sealing of outback tracks would take away from/destroy much of the attraction of the SA outback, given that strong appeal lies in the un-spoilt nature, sense of isolation, challenge of ‘conquering the tracks’, etc. Issues consistently identified included the need for improved terminal and toilet facilities at Marree Airport; rest areas along the Oodnadatta and Birdsville Tracks; more interpretation signage; and improved mobile phone coverage.

Support for a number of issues identified already exists within government agencies and it appears a lack of state funding is what is holding up implementation of improvements/new infrastructure. It follows that a key role for the OWP, SATC and the tourism industry is to be an advocate to government and politicians to ensure the needs of the SA outback are given higher priority (*it's the squeaky wheel that gets the oil*).

Opportunities exist for outback communities themselves to address some of these issues, e.g. Marree facilitate a new town heritage walking trail; install new airport terminal/toilets infrastructure; and look further at options to import temporary facilities during peak periods.

Marketing – Research constantly suggested there was room for improved cooperation between local operators; opportunities to better package product; a need to create a brand/identity for the region; and a need to raise awareness (particularly interstate) about what the region offered. It followed that report recommendations included improving the quality of and availability of information; improving the online presence of the region and encouraging more Outback Operators to register on the Australian Tourism Data Warehouse website database (ATDW). The need for additional market research to investigate opportunities in business tourism; repeat visitation; brand development; developing a tool for cost-effective consumer research, etc. was identified.

An issue identified throughout all previous reports and research was a need to improve the awareness, education and service of tourism operators. A key activity suggested to address this and other report recommendations is the development of an outback SA conference where a number of key stakeholders are invited to address Tourism Operators and update the region

on the status of tourism in 2012/13. The conference should be integrated with ample networking opportunities to encourage the building of relationships and exchange of ideas; and should aim to educate, inspire and engage.

This paper contains a wealth of information and on top of the interpretation authors have provided, is presented with a view to stakeholders being able to further analyse/utilise the content. The information is as titled 'an issues and opportunities paper' and does not purport to represent a definitive view of surveyed operators' opinions or OWP members' views or priorities.

Authors have provided a range of insights and recommendations (with a focus on practical and achievable outcomes). It is suggested OWP will need to consider, adopt, reject or prioritise these for further action.

This project has aligned with the ongoing development by the SATC of an Outback Tourism Destination Action Plan (DAP). It is suggested the OWP and SATC consider this paper in the development of priorities and actions for inclusion in their DAP.

INTRODUCTION

In recent years the Outback region of South Australia has experienced a boom in nature based tourism as people flock to see Lake Eyre in flood and the resultant impacts/changes to the area.

With the growth in air charters, coach and 4WD tours and self-drive visitors, bringing a boost to the local and regional economies, the question has been raised within the tourism industry as to what infrastructure and services changes; additional product; and new marketing initiatives can be made to ensure an ongoing high level of visitation (or at least minimize any reduction in visitor night stays and expenditure) once the lake becomes dry (as is its normal state).

In October 2011 Flinders Ranges and Outback South Australia (FROSAT) successfully sought funding from the South Australian Tourism Commission (SATC) Destination Development Fund to engage consultants to address these issues, working with and reporting to the Outback Working Party (FROSAT subcommittee).

In taking into account the FROSAT project brief and addressing the question '*How can the Outback benefit from and promote tourism in the region when Lake Eyre is dry?*' the project needed to comply with the SATC Destination Development Fund grant conditions:

- conduct a survey of operators in the region
- produce a report outline issues and opportunities in 'marketing', 'experiences' and 'infrastructure'
- focus as much as possible on identifying practical and achievable ways forward

To do so the following methodology was adopted:

- Desktop auditing to develop an operators listing and to research ATDW, Tourism SA, SATIC, etc. listings and opportunities
- A review of key past reports and plans, i.e.
 - Lake Eyre Basin Heritage Tourism Future Directions – Lake Eyre Basin Coordinating Group (2004)
 - FROSAT 2010-2011 Tourism Plan

- Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan 2008-2014 (Prepared by: Urban & Regional Planning Solutions in association with Econsearch and Ecological Associates)
- Outback Access Project Report Researching the Market and Identifying the Opportunities on The Explorer's Way and Beyond; Prepared for FROSAT and the Coober Pedy Business & Tourism Association by Prepared to Win Pty Ltd and Pure Outback
- Face-to-face meetings with SATC, SATIC, National Parks staff
- Phone and email conversations with a variety of other stakeholders, e.g. Department of Transport, Outback Access Project website developer, operators
- Surveying of FROSAT Outback Working Party (OWP) members focusing on the key issues (experiences, infrastructure & marketing) and discussion of findings with the OWP
- Similarly developing a list of two dozen key internal and externally based operators and surveying them about the key issues (experiences, infrastructure & marketing)
- Consideration of SATC's Outback Region Destination Action Plan (DAP) process and directions (the DAP and this project was running on the same times lines and had some shared objectives)
- Collation of findings into a draft report, presented to the OWP for consideration and comment
- Finalising of this Issues and Opportunities Paper

It is noted that the South Australian '*outback experience*' includes areas, operators and products not considered within the boundaries of this project. The Gawler Ranges; Nullarbor; Maralinga-Tjarutja Aboriginal Lands/Great Victoria Desert ('bomb roads'); and Anangu Pitjantjatjara Yankunytjatjara (APY) Lands regions offer great *outback experiences*. Port Augusta, particularly with the Wadlata Outback Centre providing a high quality interpretive introduction to the outback, is (rightfully) a key entry point to the South Australian outback. However, the *wet-dry Lake Eyre* phenomenon and budget limitations determined the project focus on the Lake Eyre Basin.

RESEARCH

Desktop Audit

To inform this report the authors undertook an extensive desktop audit in January this year, to identify events, accommodation providers, attractions and operators (internal and external based) (See Appendix A). Following is a summary of findings.

Category	Summary
VIC's	Wadlata (Port Augusta) – key entry point to the SA outback; Woomera; Coober Pedy; Roxby Downs
Events	15 events identified; 10 events are horse or cattle events; the Birdsville Races is the region's best known/most popular event; more novel events included the Marree Camel Races, the Great Breakaways Bolt (footrace) and Outback Air Race 2012 (RFDS fundraiser); The Coober Pedy Opal Festival is a significant event in the region
Accommodation	40 businesses were identified, offering accommodation including campgrounds, caravan parks, B&B's, motels and luxury hotel rooms. 15 of these businesses were in Coober Pedy. The SATC advises an estimate of 490 rooms in the outback region. Additional campgrounds exist in national parks/reserves.
Attractions	38 attractions were identified. 21 of these were identified as 'nature' (mainly national parks/reserves, but including outback routes and opal fields). A lack of aboriginal attractions was noted, with Iwantja Arts and Crafts at Marla Bore being the only one advertised (website).
Tour Operations (locally based)	25 local operators were identified, including 1 mine tour (Olympic Dam), 1 aboriginal experience (Reg Dodd's Arabunna Tours - Marree), 1 camel tour (Coward Springs). 17 were from Coober Pedy (mainly opal mine and shorter duration 4WD outback tours). A lack of tour operators/product at Roxby Downs was noted (it is a mining town)
Tours – Aviation (externally based)	30 air tourism businesses that operate into the region were identified. Many of these (it is assumed) are new to the region in the past few years due to the 'wet Lake Eyre' phenomena

Tours – other (externally based)	29 operators were identified. These were mainly 4WD tours, but included 2 4WD driver training businesses, 1 camel tour (Brisbane based), 1 motor-cycle tour (NSW)
Restaurants – cafes - dining	28 businesses were identified, including cafes, restaurants, and hotels.

In terms of operators and accommodation within the region Coober Pedy is the 'tourism capital' or home of most businesses. Despite having 1 ½ times the population of Coober Pedy, Roxby Downs has very little in the way of established tourist businesses/product (perhaps Roxby Downs is '*fertile ground*' for tourism development?).

The region is strong on tourist attractions focused on the natural environment (national parks/reserves); history/heritage (Old Ghan Railway, the 'tracks', pastoral history) and Outback experiences (4WD'ing Simpson Desert, driving the 'tracks'). However many of these experiences are 'self-drive' and subsequent research suggests, lack in interpretation and infrastructure. The region is weak in Aboriginal experiences/product (despite having a significant aboriginal population). Food & Wine experiences appear an opportunity for development, i.e. unique or locally sourced food used and promoted.

In terms of a critical mass/number of operators needed to support a regional tourism organisation, i.e. to drive product development and joint marketing initiatives, it is thought the region lacks numbers; so would be better off combining with the Flinders Ranges operators (if and when the '*climate*' is right to do so?). It was noted in research that a majority of external operators (in websites visited) considered the Flinders Ranges part of the SA Outback.

Past Reports – selection of key issues

With a view to not *going over past ground*, key reports from recent years were reviewed to identify opinions/trends relative to this paper. The findings follow:

Lake Eyre Basin Heritage Tourism Future Directions – Lake Eyre Basin Coordinating Group (2004)

Infrastructure Issues

- Locals have mixed feelings about the values and impacts of tourism
- There is a lack of integrated tourism planning supported by the broad range of local/regional stakeholders
- Tourism does not readily fit into the various existing legislative frameworks that govern traditional land uses in the basin, i.e. pastoral leases, protected areas, Aboriginal owned land.
- Education of tourists so that their impact on the environment (particularly water sources) and locals is minimised
- There needs to be a strategic approach to waste disposal and management in the Outback
- Establish better protocols regarding road closures and opening, particularly to minimise road damage during rain and flood periods
- Development should encourage capturing the outback “sense of place”, e.g. fit with the aesthetics, heritage or natural assets of the site/area (i.e. review and update planning and development regulations and guidelines)
- Continue and consolidate inventories of historic and heritage assets across the basin
- There is a need to stabilise/restore, protect and interpret key historic and heritage assets across the basin

Experience Issues

- The sensitive Lake Eyre and Outback environment needs to be managed sustainably to ensure items of historic and natural value are not damaged and are retained for the benefit of future generations
- The region is one of the world’s last unspoilt desert river ecosystems
- Tourism is continuing as a growing economic activity, largely due to increasing 4WD ownership over the past decade
- *“Central to its character are the unending cycles and rhythms of the Basin – natural and human activity reflecting periods of dearth or abundance.”*
- The stories of the Outback and Lake Eyre Basin are perhaps its biggest tourist assets? (Overland Telegraph, Old Ghan Railway, Aboriginal song lines and trade routes, Birdsville, Strzelecki and Oodnadatta Tracks, the Dog Fence, stock routes, etc.)
- There is a need to ally a project management and mentor approach to develop Aboriginal tourism enterprises
- Improve protection, public access, management and interpretation of selected Aboriginal sites

Marketing Issues

- *“Central to its character are the unending cycles and rhythms of the Basin – natural and human activity reflecting periods of dearth or abundance.”*
- There is a need for more detailed study of visitor perceptions of the outback experience, e.g. focus group study
- Make information about heritage places and travel routes in the Lake Eyre basin available online
- Education of tourists so that their impact on the environment (particularly water sources) and locals is minimised
- “Cooperation, coordination and communication led by a strong representative

organisation are vital for future success”

- “Locals have mixed feelings about the values and impact of tourism”
- “The biggest benefit that heritage tourism will bring is the opportunity to diversify the Basin’s economy whilst holding onto the characteristics that make the communities special”
- “A disturbing feature of this project has been the realisation of the low implementation rate of key recommendations from previous plans, feasibility studies and strategies” – stop engaging consultants for reports and start to execute ideas!! Issue is that there isn’t a body/representative charged with implementation.
- “Develop management tool for coordinated gathering of information on tourism and monitoring of impacts”
- “Prioritise key historic heritage tourism sites and attractions”

FROSAT 2010-2011 Tourism Plan

Infrastructure Issues

- “Mobile phone coverage. The lack of coverage topped the poll with nine operators commentating on it”

Experience Issues

- *Assist otherwise dispersed and often small tourism businesses to develop critical mass in both product and marketing via clustered activity in areas*
- *Build a more durable base for Outback tourism by further developing the air tourism opportunities*
- *Exploit fully the opportunities offered by the Flinders Ranges’ status as a National Landscape*
- *Reinvigorate visitor flows and tourism yield along the Explorer’s Way*

Marketing Issues

- *Assist otherwise dispersed and often small tourism businesses to develop critical mass in both product and marketing via clustered activity in areas*
- *Reinvigorate visitor flows and tourism yield along the Explorer’s Way*
- *Create stories not advertisements by responding quickly with high-quality material (information and imagery) for media stories to maximise editorial coverage of the region*
- *FROSAT also makes use of the sub-regional brand statement for the Flinders Ranges as developed during the Mountains of Memory interpretive strategy process (2006-08) for the Flinders Ranges National Landscape.themes of an ancient landscape, inspiring people, adventure and spiritual renewal.*
- *“Booking systems.a common business problem is the failure to manage online bookings properly.”*
- *Staffing and training issue during peak periods. Employing grey nomads has proved useful.*

Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan 2008-2014 (Prepared by: Urban & Regional Planning Solutions in association with Econsearch and Ecological Associates)

Infrastructure Issues

- *Improve airstrips in regional communities to support air charters and self-fly tourists..... Upgrade airport infrastructure.*
- *Advocate for the review of the Pastoral Act to provide greater clarity with respect to undertaking tourism developments and activities on Pastoral land and improve procedures for obtaining approvals.*
- *Access to communications technology is an issue with even the basic public phone proving difficult to maintain in places like William Creek and Mungerannie, where this service is essential for travellers.*
- *Specific mention was made of the need for toilets and shelter at the Lake Hart viewing area*

- *The Public Access Route to Lake Eyre and some of the routes that provide access to points of interest off the Oodnadatta Track and the Stuart Highway (eg Art Centre at Indulkana) were noted as being in particularly poor condition....*
- *Attracting investment from commercial operators.*

Experience Issues

- *Attract a new operator to Innamincka for Cruises on Cooper Creek.*
- *Build on ...existing quality products to generate immediate additional returns from current visitors*
- *Focus on new developments – products and infrastructure – that reflect the essential character of the region and can be managed sustainably to deliver experiences your markets will pay for*
- *The Outback, not defined by State and Territory borders, is high on the list of many Australians' future travel plans. It also has a great appeal to overseas visitors wanting to experience the vast spaces and brilliant colours of the desert environment.*
- *We want to provide high quality contemporary experiences that enable visitors to connect to this timeless land, its natural beauty, continuous culture and the “down to earth” people that call the Flinders Ranges and Outback South Australia their home.*
- *for visitors there are no borders or boundaries to their journeys.....*
- *Improve the quality of food and beverage service*
- *Increasing the range of tourism experiences on pastoral properties*
- *Develop additional high quality eco accommodation*
- *Increase access to Aboriginal culture and art*
- *Support new events that reinforce the region's key attributes and deliver real benefits to communities.*
- *Work with operators with interest in and capacity to provide high quality ecologically sustainable accommodation*
- *Work with existing food and beverage businesses to identify opportunities for training to improve their level of service. An initial focus could be on a Regional Barista Challenge supported by a major coffee retailer. Outback Pubs have also been identified as needing support to provide a consistent standard of customer service.*
- *Undertake training with tourism operators based on pastoral properties to better match the way they market their product with the expectations of different market sectors*
- *Develop new interpretive experiences including tours that focus on geology, ecology and cultural heritage*
- *Support the development and promotion of new night-time activities as a chance to experience the clarity of our star filled night skies and our stunning sunsets and to meet the people who live and work in these places.*
- *Outback Pubs - If there is one product that has universal appeal across all markets this is it. Everyone enjoys a counter meal, a cold beer and a yarn at the bar or around the fire. The food needs to be well cooked, value for money and most importantly the service needs to be warm, welcoming and attentive.*
- *Proving additional rail and holiday options and coach touring routes*
- *Two key challenges, “to attract, retain and develop a skilled workforce able to provide high quality customer focussed service and experience” “... will be to adequately resource and support the dwindling core of volunteers in small country towns and outback communities” Especially due to the competition for skilled workers as a result of the mining boom.*

Marketing Issues

- *Attract those who respect and value what you have to offer*
- *Build on and strengthen existing quality products to generate immediate additional returns from current visitors*
- *The Outback, not defined by State and Territory borders, is high on the list of many Australians' future travel plans. It also has a great appeal to overseas visitors wanting to experience the vast spaces and brilliant colours of the desert environment*
- *Develop effective links with Tourism Organisations in Queensland, NSW, WA and the Northern Territory to promote a consistent continuous experience for travellers to the*

Australian Outback and to encourage exploration of adjoining areas as an integral part of their journey.

- *We want to provide high quality contemporary experiences that enable visitors to connect to this timeless land, its natural beauty, continuous culture and the “down to earth” people that call the Flinders Ranges and Outback South Australia their home.*
- *our region’s products are well matched to sub markets of the international and domestic “Experience Seeker” target markets, being “activity seekers” in the post family life cycle stage, high income long distance tourers and young “excitement seekers”*
- *Promote the best that Coober Pedy has to offer our international and domestic target markets. Enhance and expand existing products to provide outstanding experiences for those seeking opal, adventure and high quality service in a totally distinctive physical and cultural environment.*
- *Undertake training with tourism operators based on pastoral properties to better match the way they market their product with the expectations of different market sectors*
- *Work with regional tourism operators to bundle products and create links that add value to the experiences available for sale by domestic and international retailers.*
- *Developing a tourism plan and articulating the brand proposition.*
- *Increasing tourism experiences on pastoral properties, providing additional rail and holiday options and coach touring routes. Focus on geo-tourism experiences.*

Outback Access Project Report (2010) Researching the Market and Identifying the Opportunities on The Explorer’s Way and Beyond; Prepared for FROSAT and the Coober Pedy Business & Tourism Association by Prepared to Win Pty Ltd and Pure Outback.

It needs to be noted that this report relates to the Explorer Hwy route from Adelaide to Alice Springs.

Infrastructure Issues

- Increasing numbers of visitors accessing the Outback are coming from Mildura and Broken Hill, bypassing Adelaide

Experience Issues

- *The long distances between key destinations/ visitor experiences and the need for a critical mass of product were highlighted as key issues.*
- *The Explorer’s Way needs to position itself with new products.....*
- *A longer-term recommendation is to extend the Explorer’s Way to Kangaroo Island and Darwin, -linking four National Landscapes and creating a “coast-to-coast” touring route - creating a product of significance to state and federal tourism.*
- *Visitors like the most*
 - *Meeting the locals and sharing a conversation;*
 - *The colours - blue skies, red earth, green vegetation (do not expect to see green);*
 - *Sense of achievement/ adventure, changing scenery,*
 - *Wildlife*
- *Visitors like the least*
 - *Distances between destinations/activities - long boring gaps of nothing to do’*
 - *Flies - and to a lesser extent, spiders and snakes;*
 - *Lack of good coffee;*
 - *Under servicing during peak times – expectations are high for bus groups;*
 - *Rough road conditions (an asset for the more adventurous);*
 - *Reduced opportunities to meet real Outback characters in frontline tour roles*
- *The northern part of the Explorer’s Way attracts those to national parks, wildlife/scenery, sightseeing and bushwalking activities.*
- *What motivates visitors to come?*
 - *Seeking sense of freedom by escaping the city and experiencing the vast space*
 - *Expectations of being able to encounter the “real” character of Australia*

- *Wanting to get to know the outback, its landscapes and people*
- *What are the main opportunities?*
 - *Providing information on safe and more appropriate driving in outback conditions*
 - *Introduction of in-vehicle technologies such as GPS navigation.....*
 - *Individual destinations collaborating*
- *lack of experiences to encourage extended stay*
- *There is a need to 'train' a lot of operators to understand the distribution system*

Marketing Issues

- *The Explorer's Way needs to position itself with new products, accessing new markets and adapt product distribution techniques to emerging technologies.*
- *The region needs more brand distinctiveness and should create a new brand position – the "Real Outback" or similar named concept.*
- *Research revealed a strong visitor preference for flexible itineraries and a declining inclination for advance booking beyond 2-3 weeks arrival time.*
- *Increasing numbers coming from Mildura and Broken Hill, bypassing Adelaide*
- *How do visitors book?*
 - *Internationals still tend to book via a travel agent.*
 - *Domestically, visitors choose (in order) phone, internet, then travel agents to book.*
 - *A higher level of online bookings for tours.*
 - *The walk-in to book rate has increased enormously - and those booking ahead are now booking a lot later.*

Note: Following the 2009 and 2010 Lake Eyre flood events Peter Cahalan (SATC) conducted a postal survey of businesses on the FROSAT database, seeking feedback on the impact of the wet Lake Eyre events. Respondents included Flinders Ranges and Outback businesses and (it is assumed) some businesses from outside the outback region? These 2009 and 2010 survey summaries have been reviewed and (where similar questions have been asked) are assessed as generally consistent with information gained during the following research.

Summary of FROSAT Outback Working Party Survey

The FROSAT Outback Working Party sub-committee was surveyed in February 2012. The committee membership included a mix of operators and agency stakeholders (e.g. local government, Outback Communities Authority, Regional Development Australia). Ten out of twelve members provided responses. The following is summary of responses.

<p>1. List in descending order (the top experience first, second best experience second, etc) what you believe are the top 5 tourism experiences available in the South Australian Outback region (excluding Flinders Ranges) (feel free to nominate a general experience, such as '4 WD'ing across the Simpson Desert', or you may want to nominate an outstanding tourism business)</p>
<ul style="list-style-type: none"> • 31 points (top experience) – <u>Birdsville, Oodnadatta and Strzelecki Tracks</u> (self-drive; bush-camping, experiencing nature and changing landscapes, history and heritage) • 31 points – <u>Coober Pedy</u> (opal industry, dugouts, history, 'noodling', surrounding attractions, opal festival) • 24 points – <u>Lake Eyre</u> (flights, self-drive, tours, dry or wet) • 11 points – <u>Coongie Lakes, Cooper Creek, Channel Country, Innamincka</u> • 10 points – <u>Simpson Desert</u> • 8 points – <u>Dalhousie Springs</u> • 6 points – <u>Outback Pubs</u> • 5 points – <u>Painted Desert-Arckaringa Hills</u> • Eleven other experiences received single mentions
<p>2. What is different and appealing to tourists about the SA Outback experience, in comparison to Outback experiences available in NSW, Qld, the NT or WA?</p>
<ul style="list-style-type: none"> • Lake Eyre and salt lakes • The stories of the tracks (Ghan Railway, Tom Cruise, European settlement) • The nature of the desert (red dunes, Simpson Desert, clear skies, mound springs) • Coober Pedy 'opal capital of the world' • State borders mean nothing to travellers • Smaller distances to travel, no wet season (more accessible?)
<p>3. What is different and appealing to tourists about the SA Outback experience, in comparison to the Flinders Ranges?</p>
<p>The people (characters, hospitality and pastoral industry); Outback Pubs; the barren (areas of nothingness) aspect of the desert; dirt roads/having been off the bitumen for the day; different fauna/flora and natural landscapes</p>
<p>4. What have been the positive benefits to the Outback region of a 'wet' Lake Eyre over the past 3 years? (list your top 3 positive benefits)</p>
<ul style="list-style-type: none"> • Increased tourist numbers • Increased numbers of operators (air operators, more coach and 4WD tours into the region) • Increased national and international media coverage/exposure (includes opening up new markets) • Extra expenditure on infrastructure and services • Extra tourist dollars spent in the region and surrounding regions (contribution to local and regional economy)

5. What have been the negative aspects of a wet Lake Eyre? (list up to 3)

- Increased traffic and tourist numbers damaging infrastructure or highlighting 'deficiencies' (e.g. damage to roads, water supplies unable to cope, lack of accommodation, no public toilet facilities at Marree Airport)
- Increased tourist numbers highlighting deficiencies in service standards or ability of operators to cope (complaints about food or service standards, lack of accommodation, complaints about accommodation not adequately cleaned, airport management not adequate/sub-standard)
- Lack of road traffic/tourists in some areas due to road/track closures (reduces operators customer numbers and income)

6. List up to 5 infrastructure improvements you would like to see in the Outback (that are going to improve tourism business and experiences), in descending order of priority (i.e. most important need first, second most important need second, etc). Be specific, so for example don't say 'better roads', but nominate a particular trouble spot, such as 'put a culvert at x creek crossing'. Infrastructure can be road signs, toilets, camping grounds, an air-strip, water supply, road, etc.

- Road issues (varying from seal a Lyndhurst-William Creek-Cooper Pedy route; address PAR (Public Access Roads/Routes) on pastoral leases issues, mainly lack of maintenance?; flood access across Cooper Creek on Birdsville Track; reflector posts at some locations, seal problem areas of the 'Tracks'; creek crossing and floodway improvements)
- Numerous new Rest Areas required at strategic attraction and main road locations, for both safety and convenience for the travelling public
- Mobile phone coverage (identify and provide at strategic locations)
- Signage (better road identification and directional signage; new and more interpretation signage;
- Water issues (particularly 'quality' in small communities – William Creek, Innamincka, Marree)
- Plus other insightful and important infrastructure opportunities identified

7. Do you see any viable (able to soon be profit making) business opportunities in the South Australian Outback? (i.e. no one is doing it at present or it is being very poorly done.) Nominate as many business opportunities as you can.

This is a hard one to summarise, other than to repeat the numerous ideas presented, as there is little repetition of ideas. Ideas presented fall into numerous activities, which include;

- Things that are happening now, but improved management or increased resources would see operating more effectively/profitably
- Things that are happening now, supported by good operators, but require extra interest and bookings by customers to increase business activities (and visitation)
- Things that are not currently (or likely to be in the near – medium future) profitable business ventures
- Some good ideas (some of which are not 'business opportunities')

The following are some of the ideas that may have potential regardless of whether we have a wet or dry Lake Eyre?

- Contract for maintaining park bays - but reliant on them being established first
- Cooper Creek water cruising - an existing local business is currently seeking approvals to establish water cruises at Innamincka promoting Burke and Wills history and talking advantage of the extra visitors the sealed road from Queensland brings
- Outback Pub Route/Trail - it's already half way there with The Outback Loop!
- Big Mine Tours - obviously requires the mines cooperation and support. Olympic Dam has one. Challenge is to identify a readily accessible (close to main road route) mine operator willing to participate. Remember 'tourism' is far from mining core business!

<ul style="list-style-type: none"> • <u>Volunteer tourism in National Parks and Arid Recovery</u> (eg visitors help with maintenance of historic buildings and structures or monitor endangered species) - It's probably being done in places but could be expanded?
<p>8. In what ways do you think the Outback could improve its marketing activities? (nominate as many ways as you like. You can be general in terms of nominating ways either the region, a town or community, or a consortium of businesses could improve their tourism marketing)</p>
<p>There were no common threads or ideas here (author's interpretation), apart from;</p> <ul style="list-style-type: none"> • Strong recognition of the need for improved cooperative marketing and packaging initiatives, and • Although not asked for in the question numerous views that development of new product is required
<p>9. What things do you believe are needed to improve the skills, knowledge and performance of tourism operators and managers in the Outback region? (list as many ideas as you can)</p>
<ul style="list-style-type: none"> • The most constructive comment I got from these responses was "Just one comment – get accredited - Australian Tourism Accreditation (ATAP) After that everything falls into place" • Apart from that customer service training, understanding customer motivations, understanding the benefits of packaging and cooperative marketing, were identified areas for training and development. • The need for better local 'product knowledge' was also identified (including the need for local operators to be better informed in the region's history)
<p>10. What are the top 5 barriers you think the SA Outback region faces in attracting tourists?</p>
<ul style="list-style-type: none"> • <u>Access and transport issues</u> (including views about remoteness; perceived remoteness where there isn't; lack of public transport, high fuel costs, long distances between attractions) • <u>Infrastructure issues</u> (poor roads; lack of quality accommodation; accommodation shortages; inadequate mobile/internet coverage) • <u>Cooperation issues</u> (including lack of cooperation across the region, between operators, within towns) • <u>Communication issues</u> (conflicting information; lack of information on diversity of product/experiences available; marketing issues) • <u>Services issues</u> (lack of services; inadequate opening hours; poor customer service) • <u>Product issues</u> (lack of product and product variety; no 'wow' factor)

Summary of Operators Survey

Introduction

Further to the desktop audit of operators within the SA Outback region, 23 tourism operators were identified for the operator survey with consideration of balance given to:

- SA based operators
- Interstate based operators
- Accommodation providers
- Attractions
- Tour operators
- Aviation operators
- Restaurants/Dining

Additionally, consideration was given to the operators surveyed through the Outback Tourism Working Party and their balance within the above categories.

Operators were called to introduce the project, identify the most relevant contact person, obtain the best email address and encourage participation. 20 out of the 23 operators were successfully reached personally and the remainder contacted multiple times, some with voicemail access.

The survey was sent on Tuesday 20 March 2012. The electronic survey consisted of 16 questions, 10 of which were the same as the Outback Tourism Working Party Survey, to allow for aggregated results.

Operators were then followed up via phone to remind them to complete the survey and in some cases continue to encourage participation and offer to resend to alternate email addresses.

While some operators were keen to provide feedback and insight, most were agreeable and a few were reluctant. Those reluctant were predominantly due to time constraints, and one was vocal about it being a waste of time and feeling that they are never heard when they participate in such activities (interestingly this opponent was convinced to participate for the good of the industry).

The closing date for the survey was Friday 30 March, however was extended to many as a result of follow up calls and was finally closed on Wednesday 11 April 2012.

A total of 15 out of 23 responded to the survey, representing a 65% response rate.

Interestingly over 50% were from interstate-based tourism operators. 10 out of 15 (67%) respondents were operators that use the region (as opposed to those being based in the region), of which 8 were based interstate and 2 in SA.

Results

Top experiences

1. List in descending order (the top experience first, second best experience second, etc) what you believe are the top five tourism experiences available in the South Australian Outback region (excluding Flinders Ranges) Feel free to nominate a general experience, such as '4WD'ing across the Simpson Desert', or you may want to nominate an outstanding tourism business.

A wide range of experiences were listed, from self-promotion of the respondents' core business, to generic themes and specific activities. Overall the responses can be summarised in descending order:

- 48 points – Lake Eyre
- 26 points – Birdsville and Oodnadatta Tracks
- 22 points - Simpson Desert
- 20 points - Coongie Lakes, Cooper Creek, Channel Country, Innamincka
- 16 points - Coober Pedy
- 9 points - Marree
- 5 points - Painted Desert-Arckaringa Hills
- 4 points - Outback Pubs
- Other
 - Bronco Branding
 - Mound Springs
 - Burke & Wills sites

- Cultural experiences
- Breakaways
- APY Lands
- Woomera Museum
- Witjara National Park
- Gammon Ranges
- Farina township
- 4WDing
- Unique environment
- Arid Recovery
- Coward Springs
- Old Timers Mine
- Outback sunsets
- Air touring

Different & appealing compared to other states

2. What is different and appealing to tourists about the SA Outback experience, in comparison to Outback experiences available in NSW, Qld, the NT or WA?

Again, varied responses, difficult to categorise. Brief summary:

- Lake Eyre
- Coober Pedy
- The stories of the tracks
- Indigenous history
- Pioneering history
- Opal mining
- Open vastness / severe isolation / desolation
- Off-the-beaten-track
- Closer to East Coast making it more accessible/appealing for Fly in Tours
- Unique vegetation and scenery

Interesting feedback from one operator that SA does not promote tourism as well as Queensland or the Northern Territory in terms of signage, information and advertising. Another states it is less developed and therefore more 'off-the-beaten-track'.

One interstate respondent advised SA was equal to the other states.

Different & appealing compared to Flinders Ranges

3. What is different and appealing to tourists about the SA Outback experience, in comparison to the Flinders Ranges?

Varied responses. Brief summary:

- More remote
- Different history
- Infrastructure eg roads and airstrips more basic
- Opal mining
- Different landscapes / deserts
- Lake Eyre
- Less people
- More open space
- Opportunity to get closer to the spirit of the outback
- Less polished, more uncharted territory

Two respondents marked the question as not applicable.

Benefits of 'wet' Lake Eyre

4. What have been the positive benefits to the Outback region of a 'wet' Lake Eyre over the past 3 years? List your top 3 positive benefits.

Varied responses. Brief summary:

- Opportunity for promotion and business growth
- Increase in tourist numbers
 - Increase in repeat tourists
 - Increase in WOM (word of mouth)
- Increase in coach tours
- Increase in air tourism
- Increased interest and public awareness of the region
- Increased profitability
- Opportunity to develop/upgrade infrastructure
- More wildlife

- Provides differentiation

Negative aspects of 'wet' Lake Eyre

What have been the negative aspects of a wet Lake Eyre? List up to three.

Varied responses. Brief summary:

- Impact on local community with influx of tourists
- Obstructs travel routes / Accessibility
- Limited accommodation due to high demands
 - Lack of camping grounds near lake
- Increase accidents due to inexperience and lack of information
- Increase in road usage, causing damage
- Low satisfaction of some tourists from poor tour operators
- Increase in poor tour operators
- Unrealised expectation of tourists
- Lack of government investment

Infrastructure improvements

6. List up to five infrastructure improvements you would like to see in the Outback that are going to improve tourism business and experiences, in descending order of priority. Please be specific. Instead of saying 'better roads', nominate a particular trouble spot, such as 'put a culvert at x creek crossing'. Infrastructure can be road signs, toilets, camping grounds, an airstrip, water supply, road, etc.

The key issues are ranked in order below:

1. Road issues
 - Birdsville Track upgrade
 - Oodnadatta track gravel
 - Information to Qld operators on road conditions to Innamincka not just border
 - One way traffic in Simpson Desert
 - Fix roads into Burkes and Wills sites
 - Seal loop Marree to Roxby Downs
2. Airports
 - Marree Aerodrome – passenger terminal, upgrades, parking, refueling, toilet dump – many comments

- Marree airport – dedicated helicopter pad
 - More airports for larger planes eg 50 seats
 - Coober Pedy runway extension
3. Toilets
- Oodnadatta track
 - Birdsville Track
 - Cordillo Downs
 - Maintenance
 - Marree airstrip
 - Edge of Lake Eyre
4. Signage
- Birdsville Track
 - Interpretive signage various locations
 - Breakaways
 - Mining signs for safety
5. Mobile Phone coverage
6. Rest areas
- Oodnadatta track and Stuart highway

Other improvements suggested include:

- Marree Man
- Ghan heritage
- Upgrade Arid Recovery Reserve
- Tougher regulation on illegal operators
- More control over Mt. Dare
- Coordinated disaster plan
- Better/Larger ferry for the Cooper Creek (able to take a bus)

One respondent noted that they are happy with the Outback as it is, with limited infrastructure as it adds to the remoteness, which tourists are looking for.

Viable Business opportunities

7. Do you see any viable (able to soon be profit making) business opportunities in the South Australian Outback? (i.e. no one is doing it at present or it is being very poorly done.) Nominate as many business opportunities as you can.

A wide range of suggestions were put forward. Only four respondents had no comment. The below summarises the suggestions into key areas:

- Marree
 - Better café/restaurant/bakery
 - Better accommodation
 - Local tour guide
 - Self-guided walks – possibly train locals to implement
 - 4x4 touring of immediate region
 - Tourist booking centre
- Lake Eyre
 - Ground touring
 - Water sports
 - Camping facilities on the edge of the Lake
 - Airstrip in the middle
 - Dinner in the saltpan, guests transferred by helicopter/aircraft/4WD
 - Adventure tourism – fishing, canoe, bush walking etc
- Outback Cattle Station fly in/out short duration holidays
- Arid Recovery Caravan/Camping ground and function rooms for meetings and events
- Tours into Moomba and the oil/gas operations
- Outback Film Museum in Coober Pedy

There is general sentiment that there needs to be new product and experiences to encourage visitation when the Lake dries. It was noted that hospitality services in Marree were very poor.

Improve marketing activities

8. In what ways do you think the SA Outback could improve its marketing activities?

Nominate as many ways as you like. You can be general in terms of nominating ways either the region, a town or community, or a consortium of businesses could improve their tourism marketing.

Respondents' recommendations are summarised in order of priority under the following themes:

1. Branding & positioning

- More information available
- Market wide range of offerings not only top-end, to demonstrate the outback can accommodate a more rounded experience
- Create an SA Outback brand, its own personality, positioned differently to Flinders Rangers
- Increase position and reputation through awards and accreditation
- Focus on 1- 3 hero products/destinations, focus on more than Lake Eyre
- Consider Ambassador figure eg Dick Smith – outback legend
- Challenge –overcome perception there is nothing north of Barossa other than the Flinders Rangers
- SA brand presence not as strong as other states
- Breakdown outback border perceptions / cross boarder promotions

2. Advertising

- Requires injection of funds from SATC
- Advertise in other SA regions
- Overall more local and national advertising
- Specific Outback SA branded/themed campaigns
- Increase co-op marketing efforts

3. Target markets

- 4WD market
- Retired
- Young families in school holidays
- Corporate sectors
- Promotion of events to targeted markets
- Mining industry – encourage them to explore locally
- SA tourists

4. SATC involvement

- Inject funds
- Increase co-op marketing opportunities
- Increase international marketing
- Increase famils (with tour operators)

5. Media

- Increase PR activities
- Regional specific media exposure in Eastern States

6. New product

- Camel tours
- Dedicated 4 x 4 tracks
- Underground home tours

Other:

- Increased information on outback facilities
- Promote Burke & Wills stories and sites
- Capitalise on historic features such as Birdsville Track
- Highlight Afghan heritage in area
- Sponsorship and promotion of unique events
- Develop an artistic edge for the SA Outback
- Increased promotion of Explorer's Way

One interstate-based operator noted "You have the best outback in Australia and are not marketing that simple fact."

Things required to improve skills, knowledge and performance of tourism operators and managers

9. What things do you believe are needed to improve the skills, knowledge and performance of tourism operators and managers in the Outback region? List as many ideas as you can.

- A better network for tourism operators, eg Outback Queensland Tourism Association, regular communication and help to promote each other for their tourists next destinations.
- Better education of offerings to operators and key tourism information sources
- Maintain the real outback style with local knowledge and expertise, don't subscribe to traditional services models
- Stable, reliable, trained staff with good customer service skills – beware the 'take-it-or-leave-it' approach.
- Well maintained and operational equipment
- More information packages

- Localised training on public relations
- Famil/field trips for operators to visit other local attractions
- Increased training eg SATIC
- More sites for tour operators only

It was interesting to note during the analysis that while many in region operators felt the service levels are appropriate, the interstate operators felt they needed improvement. However it was noted that this was not to be at the expense of the unique 'outback spirit'.

Barriers in attracting tourists

10. What are the top five barriers you think the SA Outback region faces in attracting tourists?

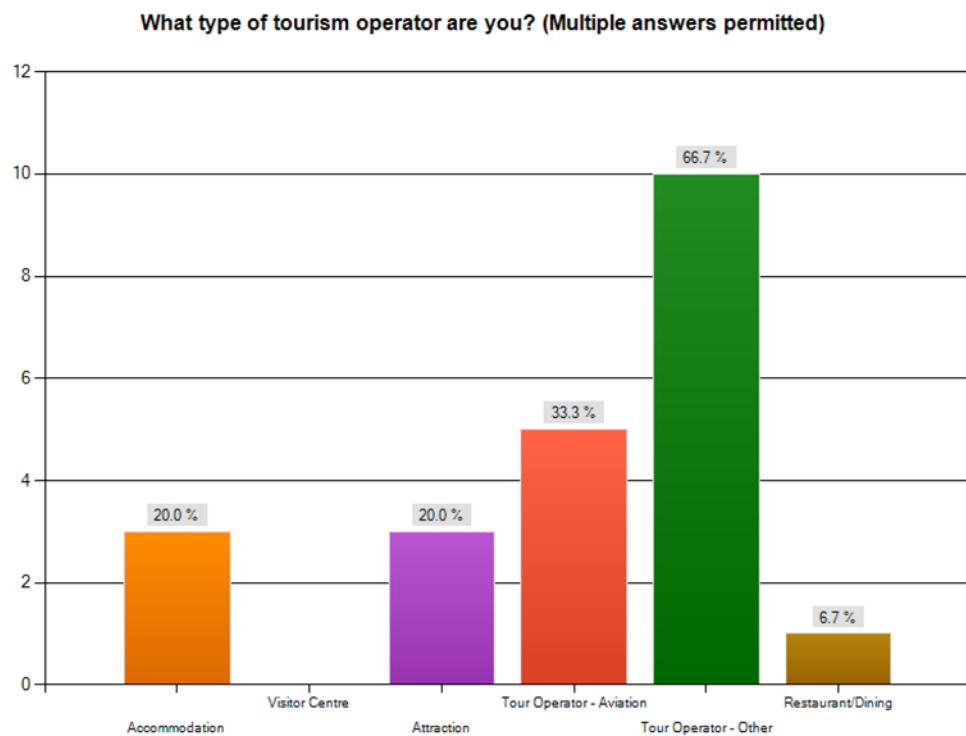
Responses are summarised in order of priority under the following themes:

1. Access and transport
 - Flights:
 - Cost of flying in/out
 - No consistent direct flights from other cities (or Alice Spring or Uluru)
 - Distance / remoteness
 - Road closures / closed roads reporting system
 - Limited time of tourists
2. Communication
 - Lack of advertising
 - Lack of destination awareness / Outback SA brand
 - Low word-of-mouth (relative to potential)
3. Infrastructure
 - Roads
 - Picnic areas
 - Toilets
 - Limited accommodation options
 - Signage / information
 - Water
4. Product
 - Not enough product

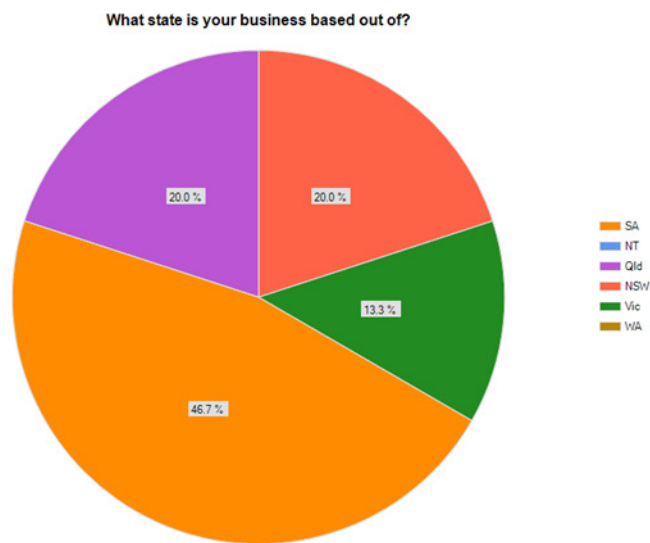
- Lack of appropriate product
 - Lack of new product
5. Services – some not all
- Low quality of food
 - Low customer service skills
 - Can be too laid-back
 - More training required
6. Other
- Discount overseas holidays
 - Strong \$AUD
 - Tourists attracted to well-known destinations, rather than get off the beaten track
 - Tourism does not seem to be a priority of the region
 - Fuel prices
 - High prices due to freight

Profile of respondents:

Type of tourism operators

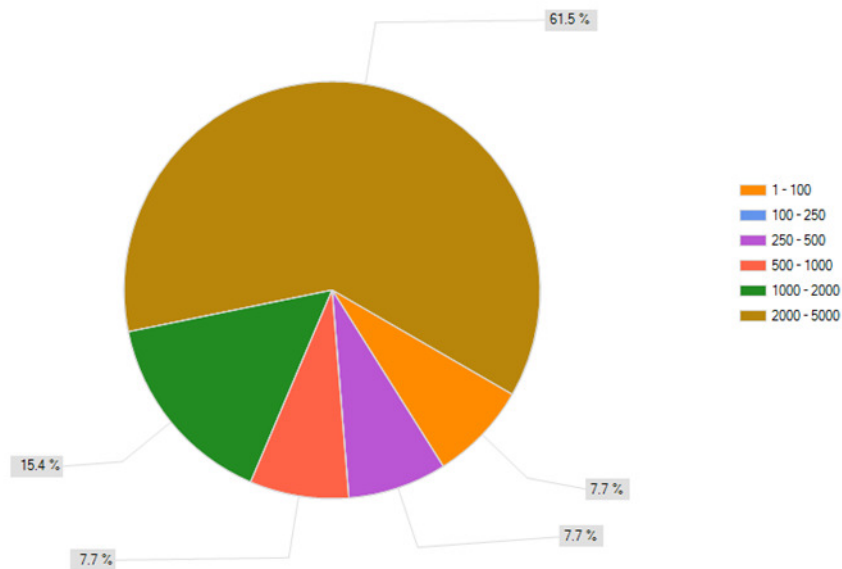


State



Number of tourists p/a

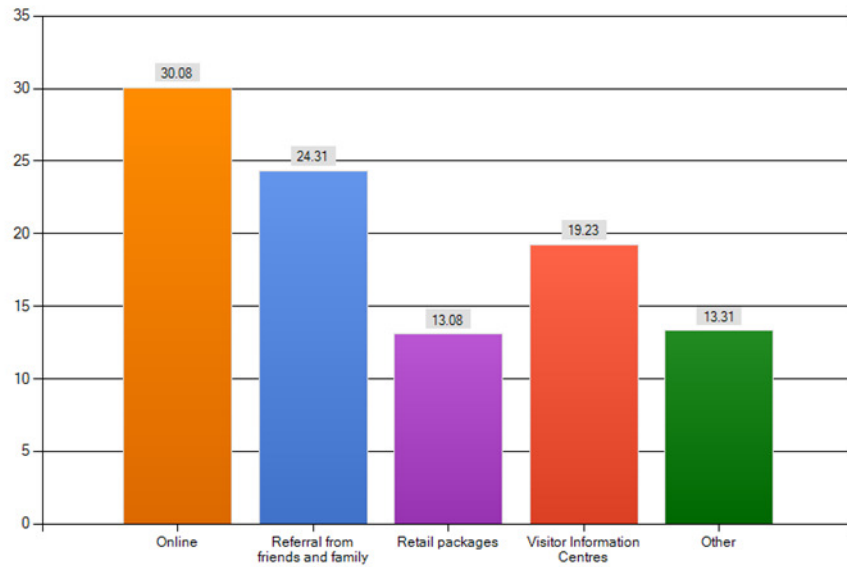
Approximately how many tourists does your business service each year?



A limitation of the survey was the oversight in including a category for 5,000 +. One operator (an attraction) did note that they service over 20,000 tourists each year.

Lead generation channel

How do your customers find out about you? Estimate a percentage for each option eg: Online 40, Referral 30, Retail packages 10, VIC's 10, Other 10. Please enter a percentage estimate as a whole number eg 50.

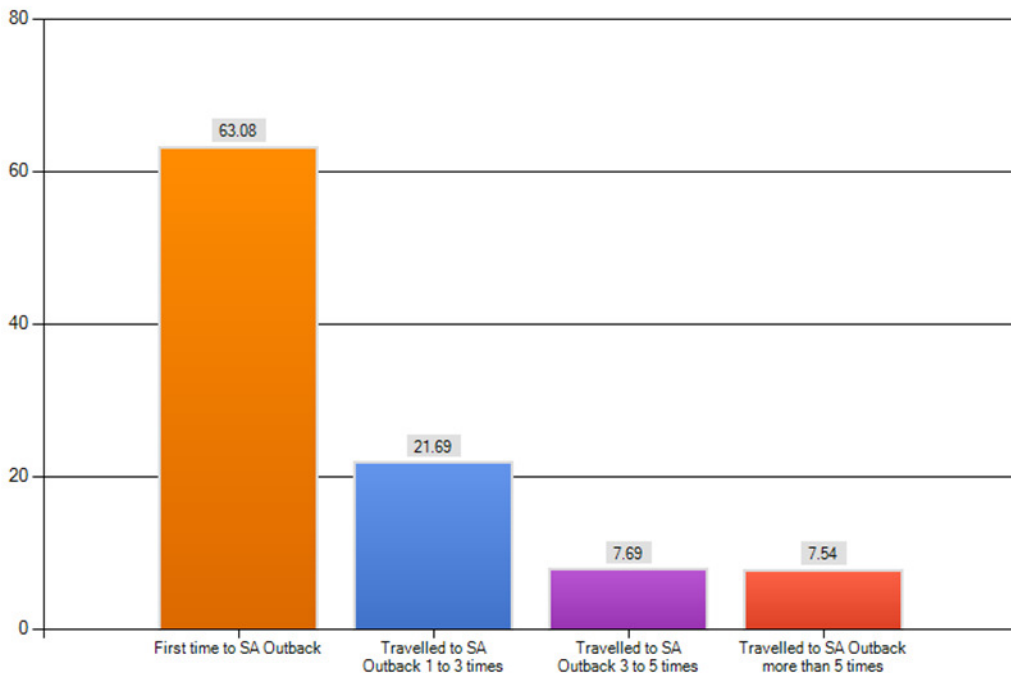


The

only significant change (greater than 5%) when looking solely at tour operators was a lower percentage in VIC's.

Estimate of repeat tourists

Please estimate how many times your tourists have visited the SA Outback. (Estimate a percentage for each option, so that the total is 100%) Please enter a percentage estimate as a whole number eg 50.



Additional comments

A few additional comments were given, in summary:

- Many Australians, namely along eastern states, unaware of SA Outback unique tourism offering
- Would like to see the region promoted as its own in conjunction with Flinders Ranges
- Fear the boom in recent years has not been leveraged appropriately with low level of positive word-of-mouth due to bad roads (for 4WD and trailers particularly) and poor facilities
- There is a lot more than Lake Eyre, but not currently promoted

Other key stakeholder consultation

SATIC

Penelope Bettison met with **Bianca Borrett, Business Development & Communications Manager** on Wednesday 14 March to discuss the role of SATIC and how Outback SA can benefit from their activities.

Bianca advised that while there are approximately 550 SATIC members statewide, approximately only 13 of these are from the SA Outback.

The key offerings for SATIC are:

- Accreditation
- Training
- Industry Communications and networking
- Tourism Awards
- Advocacy

Barriers that SATIC faces in recruiting accredited members include operators being initially daunted by the accreditation process or not making the time to complete it.

Training for the industry was discussed and Bianca advised that face-to-face rather than online training solutions have always proved more successful, possibly due to learning from others, not merely the content provided.

SATIC recently received funding to provide Cert IV in Small Business Management. They have conducted training in Fleurieu and Adelaide (x2), however interestingly the Port Augusta training was relocated to Adelaide as operators preferred to come down to Adelaide.

Bianca discussed a roadshow that could happen in the region covering items such as their role, membership, accreditation and tourism awards. In subsequent communication Bianca advised she had discussed the SA outback with her team and they would be happy to deliver the roadshow in the SA Outback, further to discussion with the Outback Tourism Working Party and demand locally.

Explorer's Way Touring Route

Penelope Bettison spoke with Adam Ruggeri, Marketing Director, Great Southern Destinations Marketing (GSDM) on Thursday 29 March to discuss the impending soft launch of the Explorer's Way online information portal (part of the Outback Access Project).

GSDM are responsible for developing a range of marketing programs/touring routes including Great Southern Touring Route, Melbourne to Adelaide and the Explorer's Way (Adelaide to Alice Springs).

These have been developed under a body known as Great Australian Journeys, however Adam could not confirm if this was an incorporated body and advised he thought Paul Victory (ex Adelaide Sightseeing) was looking into this at some stage, (although Paul is no longer involved as he has moved to Queensland). Adam's primary contact is Lisa Pearson (co-author of Outback Access Report discussed previously) who submits all the material and approves design concepts.

The Explorer's Way web platform aims to engage consumers, provide a resource for international travel trade and a resource to its members (tourism operators who participate). The soft launch of the booking request system to engage the industry is due in May with a broader launch planned for ATE (mid June 2012).

Following the soft launch, phase two will roll out a seamless booking engine with consumer booking carts. Consumers will be able to build customised itineraries. It aims to remove the geo-political boundaries of regions and open the minds of wholesalers in terms of packing.

The Explorer's Way Route has been developed on the back of the success of Great Southern Touring Route platform which was launched in 2011 with iphone and ipad applications, impressing consumers and wholesalers alike. There is potential for further routes to be developed including a Nullarbor Plains journey.

Adam explained that touring routes are becoming increasingly competitive with various concepts throughout the country.

The Great Southern Touring Route Inc. is in its 20th year and provides a good model to consider for best practice. It took the route stakeholders approx 14 years to settle on the route and despite political push to modify and change it at times, its strength has been in its consistency. It has been important to nail the core route and then allow thematic routes and supplementary experiences. Four Regional Tourism Organisations and Tourism Victoria are involved. Three years ago they contracted an Executive Officer who is responsible for uploading all the content on the platform. They successfully make decisions for the broader region, leaving local agendas behind for the benefit of the entire region.

A key issue for Explorer's Way will be the management of content on this new platform, given there is no formalised structure to keep projects moving.

This platform is not powered by TXA, which Adam advised has limitations with fields. It is powered by a standalone Content Management System (CMS) and is therefore not an extension of the tourism assets of SATC or Tourism Australia. Tourism Operators will be able to create their own profiles on the platforms microsites with a unique variation of URL.

South Australian Tourism Commission

Initial Meeting

Tony Dahlitz and Penelope Bettison met with **Peter Cahalan, Industry Partnerships Manager, Shaun de Bruyn, Manager – Experience Development and Mark Blyth, Senior Business Manager – Government Projects** on 31st January 2012. This meeting addressed the roles of each participant and their views of historical and current activities for the SA Outback region. Tony and Penelope explored what resources were available for the project, other key stakeholders within SATC to approach and confirmed work and plans previously prepared for the region.

Regional Sales Department

The following is a summary of a conversation on Wednesday 14 March with **Debra Pietsch, Industry Development Executive** to discuss the Regional Sales Department (which had only been in operation for approximately six months), current activity in Outback SA and identify any opportunities.

Key areas for discussion included visitor information centres (VICs), industry online development, Australian Tourism Data Warehouse (ATDW), Tourism Exchange Australia (TXA) and the SATC online Booking system and online bookings via southaustralia.com.

The pilot program for VICs has eight in total for 2011/12. Debra wasn't sure if any Outback VICs applied, but advised it would be good if one was identified to be involved in the next round. For example the Wadlata Visitor Centre would be a great candidate for 2012/13. The Flinders Ranges VIC in Quorn is the closest VIC to the SA Outback currently involved with the program.

It was noted that many SA Outback operators are not listed on ATDW and main barriers are likely lack of knowledge and time. This is an ideal information point for tourists and a free service to operators. Once registered this can lead operators through to the TXA and online booking systems. The challenge is to get them past the first step.

The SATC identified that only approximately 30% of the ATDW product is bookable online and many SA Operators require some education in getting online. Therefore four staff members have been dedicated to helping business with free one-on-one training in the areas of online booking systems, online distribution, websites, social media (eg Trip Advisor) and search engine optimisation. Tamara Modra has been appointed to look after the Eyre Peninsula, Flinders Ranges & Outback.

Penelope spoke with **Tamara Modra, Industry Development Executive** on Tuesday 3 April. Tamara spends one week a month in each of the two separate regions. Her scope of regions has only just changed. She was previously also working with Barossa and Clare, leaving little time for the Outback. She has visited the Southern Flinders, Flinders and now due to do the Outback.

She has visited Coober Pedy with limited success, due to interest in meeting with her. She had planned five meetings and due to unexpected cancellations only met with three businesses. It is important that Tamara meet with as many businesses as possible to make the program worthwhile and viable.

The meetings are usually for about an hour and a half and are a free opportunity for businesses to gain advice on effective online tools.

Issues she has faced include internet access, business not understanding the role of the SATC and some tourism business that are sideline projects and therefore operators not 100% committed.

Tamara advised that her recent visit to Arkaroola highlighted internet speed issues and she suspects there would be similar concerns at destinations such as Marree and Oodnadatta.

It was identified that only 5 operators from the SA Outback are on the TXA. Tamara's key objective is to get as many tourism businesses on the SATC website with a book now button (enabled through TXA) as possible.

Tamara advised she has approximately 15 businesses on her Outback target list. It was suggested that a copy of the desktop audit from this report be made available to her for further leads.

Regional Marketing Manager – Mark Phelps

The following is a summary of a conversation held on Wednesday 14 March with Mark Phelps to discuss activities of the Regional Marketing Department in regard to the SA Outback. Mark outlined the SATC's focus on five key themes and experiences:

1. Coast
2. River
3. Journey
4. Food & Wine
5. Landscapes

A new Explorer's Way campaign (Adventure...All the way) was discussed, with the SATC investing \$150K into a joint initiative (total campaign value \$625K) with NT Tourism and various commercial operators.

This campaign links the two states with campaign activity incorporating tradeshow, press, online advertising, promotions, mini website, social media

and mobile phone application (Mates Rates). It provides a free opportunity for operators to promote themselves by submitting an offer, which was due in early February 2012. It is not aligned with the new platform being developed through Great Australian Journeys (Outback Access Project)

Mark advised they are moving away from the SA Brilliant blend branding to create clearer identities for each region.

Co-op marketing funds were also discussed where SATC will match tourism operator investment dollar for dollar, minimum \$5K – max \$100K per operator per annum. 2010//11 fund ran out early in 2012 at \$1.2M and they are awaiting an announcement for 2011/12. Only two operators from Flinders and Outback took part, Rawnsley Park and Old Timers Mine. However it was also accessed by inbound operators eg Outback Encounters/ The Tailor, which is a General Sales Agent (GSA) for some outback operators.

Mark advised a barrier to SA Outback operators being successful in receiving co-op marketing funds could simply be awareness. The fund is communicated to operators through Opportunity Knocks and is usually communicated strongly through RTO's.

DENR District Manager

The following is a summary of a conversation held in April 2012 with Tony Magor - the Department of Environment and Natural Resources District Ranger – Desert Parks

- Simpson Desert Regional Reserve closure for 3 ½ months over summer, according to their road counters, affects 35 vehicles and half of those would be national parks staff vehicles.
- 4,000 vehicles (9,000 visitors) cross the Simpson Desert annually. June, July, August is the peak period, with July school holidays being chaotic. It's obviously a very popular journey with city-based 4WD'ers in particular. There are opportunities for further promotion and growth of this experience, as visitors are generally environmentally conscious and cause little damage (there is some minor 'off track' driving and some rubbish dumping, but National Parks staff and Friends clean this up)
- Witjira N.P. (Dalhousie Springs, etc) has 16-18,000 visitors annually. In 2009 this was 21,300. In 2011 this was 17,000 people
- Historically annual sales of Desert Park passes have been cyclical, but in the past few years there is a continual growth in annual sales
- Innamincka Regional Reserve visitor number trends are not known as counters only went in 2010. Previous estimates have been around 30,000 annually, but the accuracy of these due to repeat journeys in and out by visitors, locals and staff, is suspect. In fact the access to Coongie Lakes for the past 2 years (and this year as well) has been cut due to flooding. This has meant a decrease in visitor numbers.
- Lake Eyre National Park has seen a nearly 5 times growth with a wet Lake Eyre. The historical numbers were 5,000 visitors a year. In 2009 it was 24,000. In 2010 it was 16,500 (wet and closed roads restricted numbers). In 2011 it was 24,100.
- The assessment is a wet Lake Eyre brings a huge influx of tourists to Lake Eyre but not to other parks in the region. The conclusion is it is short trips in and out to see the wet Lake Eyre and birdlife. So mainly journeys in from the south via road?
- There is an Indigenous Co-management Agreement for Coongie Lakes, (but the indigenous people do not currently provide an indigenous tourism experience)

- Similarly there is nothing happening with Oodnadatta and Finke based aboriginal communities re indigenous tourism product in Witjira National Park, even though they have management/decision making responsibilities. They hand back management to National Parks. One opportunity may be to have tour operators incorporate a local indigenous guide into Witjira N.P. visits (but training and reliability may be issues?)
- In terms of PAR's (Pastoral Access Routes) the 3 key ones in the region are Halligan Bay; Level Post Bay (both Lake Eyre) and Pedirka (Witjira NP). They are controlled by agreement between the SA Pastoral Board and pastoralists. Various agencies are trying to secure a PAR roads budget for the Pastoral Board so they can fund basic maintenance. The PAR's are dirt tracks on fragile ground. They are rough, but visitors need education to 'drive according to conditions'. A strategy would be to get funding to at least allow upgrades to PAR's at particular 'trouble spots'
- There is a new 'no fires' policy at Witjira N.P. to protect the environment. Some people are complaining about this, particularly as the peak tourist season is winter and people want to stand around an open fire. However it opens up a business opportunity for nearby Hamilton Station managers (who, it was reported, are currently establishing cabins and a camp-round?)
- Growth in 'friends'/volunteers in national parks is an opportunity. National Parks would love more if they could find them!
- The status of management plans of national parks and reserves in the region is a mixed bunch. A lack of funds is an issue that holds up progress on developing management plans.
- In terms of campgrounds, Halligan Bay at Lake Eyre gets busy in a wet Lake Eyre (but not a dry one); Dalhousie gets busy in winter season and they have camp-ground hosts (volunteers) help out at this time; there is a strategy under consideration to make Dalhousie only 'swags and tents' and shift caravans and campers to other campgrounds within Witjira NP; Around Innamincka the 'town common' can get busy during peak periods. No plans were advised to substantially change campground numbers and capacity (no real need?)
- Visitor expectations are changing over time. A decade ago people were happy with a basic campsite and toilet. Now people are paying more for Park Passes/entry, so they both want more in facilities and they are reluctant to pay for extras (such as fire wood). It is the case that society and

the demographic of visitors (more from the city with 4WD's?) is changing as well (equals changing/higher expectations?)

- Having said this, National Parks in the region are endeavouring to do provide a basic upgrade of all national parks which includes, better introduction and interpretive signage; identification/delineation of camp-sites; walking trails, etc, so as visitors see they are visiting a park or point of interest (rather than the old situation of visiting an ill-defined location in the bush)

Traffic Services Division - Dept of Planning, Transport & Infrastructure

In March 2012 a variety of information on traffic volumes in the region was sourced from the Traffic Services Division of the SA Dept of Planning, Transport & Infrastructure. The following tables provide a selection of data.

TABLE: Average Daily 2 Way Traffic Volumes (7 days) for selected locations		
Date	Class 1 & class 2 vehicles (cars & cars towing)	Total for all vehicles
Oodnadatta Track – 2 km east Marla		
11/6/2003	34	42
17/5/2006	23	27
7/4/2009	16	19
6/7/2010	24	27
Stuart Hwy – 5 km north of Marla		
28/5/1996	255	313
2/2/1999	162	219
13/6/2001	336	416
14/5/2003	314	401
17/5/2006	250	335
7/4/2009	296	373
Hawker-Marree Rd – 2 km north Lyndhurst		
8/8/2000	147	160
22/8/2001	100	110
5/8/2002	91	109
4/8/2003	74	85
3/8/2004	82	94
2/8/2005	70	80
8/8/2006	64	76
7/8/2007	80	93

4/8/2008	71	88
5/8/2009	135	162
3/8/2010	151	166
1/8/2011	129	150

Comment:

These statistics support the Tony Magor (District Ranger - Desert Parks) assessment that the majority of visitors to the region are coming to see Lake Eyre (from the south via the Hawker-Marree Rd) but not choosing to visit other parks in the region whilst they are here, i.e. a short trip in and out from the south, rather than an extended trip into the region.

Anecdotal evidence (comments from operators in the region) suggests the region has benefited from extra tourist travelling throughout the region during wet Lake Eyre years, but further research would be needed to quantify numbers and travel patterns/routes.

TABLE: Annual Average Daily 2 Way Traffic Estimates (24 hour 2-way flows) for selected locations				
Year of data publication	Stuart Hwy – NW of Pimba	Stuart Hwy – Coober Pedy to NT border	Hawker – Marree Rd - just south of Leigh Creek	Hawker – Marree Rd – just north of Lyndhurst
2003	410	330	200	110
2005	370	390	200	95
2008	340	330	200	100
2011	370	350	210	120

Comment:

These statistics indicate an increase in traffic along the Stuart Hwy in 2011 compared to 2008 of between 20 and 30 vehicles a day. However it is noted these numbers are down on 2005 and substantially down on 2003 figures. To what extent increased traffic in 2011 is due to a wet Lake Eyre or due to increased resources industry activity (or other factors) is not known.

The substantial increase in traffic on the road north of Lyndhurst, leading to Marree and Lake Eyre, in 2011 compared to previously (20 vehicles/day = 7,300 vehicles/year) can be assumed to be mainly increased tourist traffic (due to the *wet*

Lake Eyre phenomenon). This would support the Tony Magor (District Ranger - Desert Parks) assessment that Lake Eyre received between 10,000 and 19,000 extra visitors annually over the past 3 wet Lake Eyre years.

The increased traffic volumes north of Lyndhurst compared to south of Leigh Creek suggest that many self-drive visitors (up to 50 %?) are travelling to Lake Eyre either from the eastern states via the Strzelecki Track or via an eastern detour through the Flinders Ranges (?)

Please note that these statistics provide *an indication only* and should not be relied upon as the sole source of information on which to base decisions.

Industry Statistics

Peter Cahalan introduced Penelope Bettison to Kathleen Linkson, Research Manager, Strategy and Policy, SATC on Tuesday 31 January to discuss what tourism statics are available for the SA Outback region. Kathleen advised that due to a change in collection methodology this will be the last year that SA outback statics will be available as separate figures to a combined Flinders Ranges and Outback statistics.

Kathleen subsequently sent through a range of statistics for reference, and copies of these are provided as Appendices B and C (separate electronic files).

Appendix B - Regional Tourism Profiles – Outback SA Region 2009/2010

(Source: Tourism Research Australia)

Key insights:

In 2009/10

- \$113 million was spent by visitors in the region
- A total of 225,000 visitors went to the region – 78% were domestic overnight visitors
- 882,000 nights were spent in the region – 88% were by domestic overnight visitors

In June 2007 there were more than 100 tourism related businesses in the region:

- 43% were non-employing businesses
- 49% were micro or small businesses

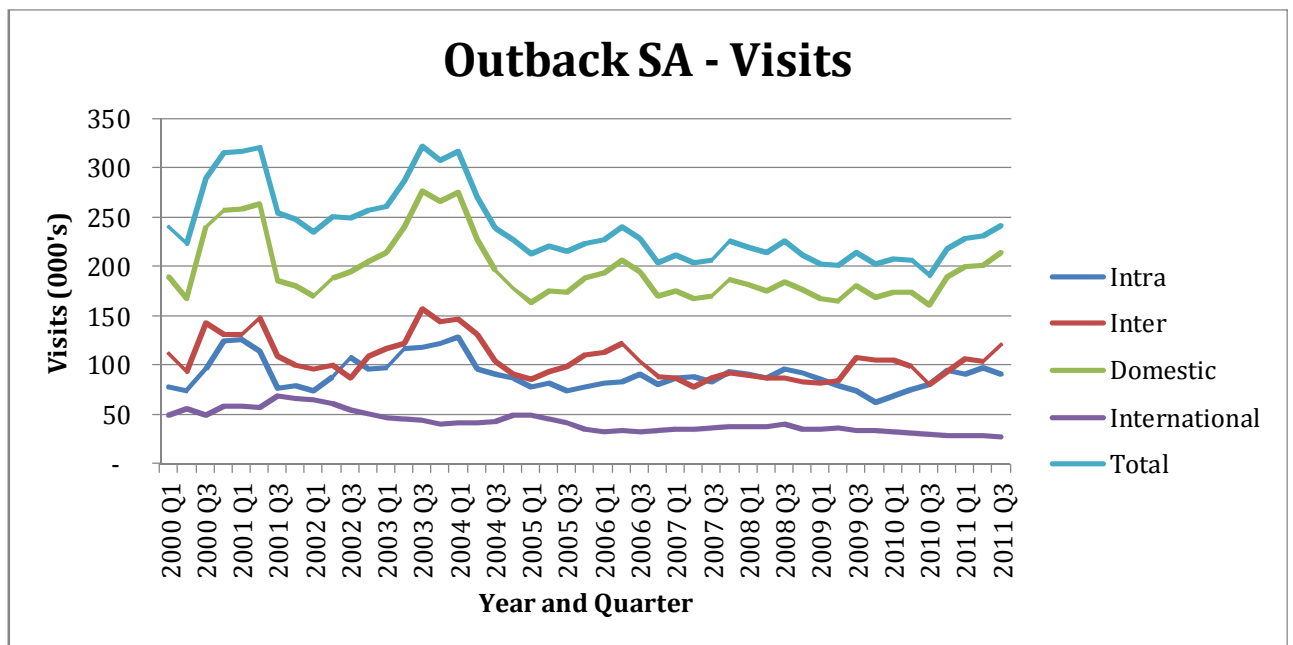
Appendix C - Outback Data (Feb. 2012)

(Source: 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 size 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. All data should be referenced accordingly.

Visitors

Rolling annual 2000 – 2011, reported quarterly

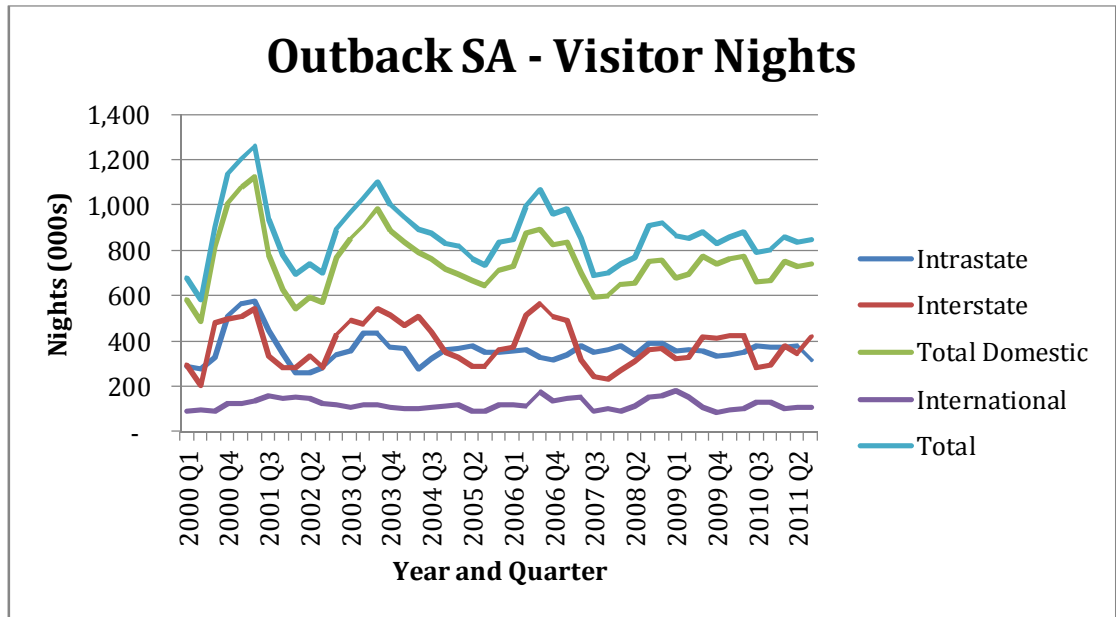


Insight:

- Peak in 2003/4 then a slight drop and steady (following 2002 Year of the Outback)
- Domestic key market, with little difference between visitation from interstate and intrastate
- Interstate visitors currently trending up

Overnight Visitor Nights

Rolling annual 2000 – 2011, reported quarterly

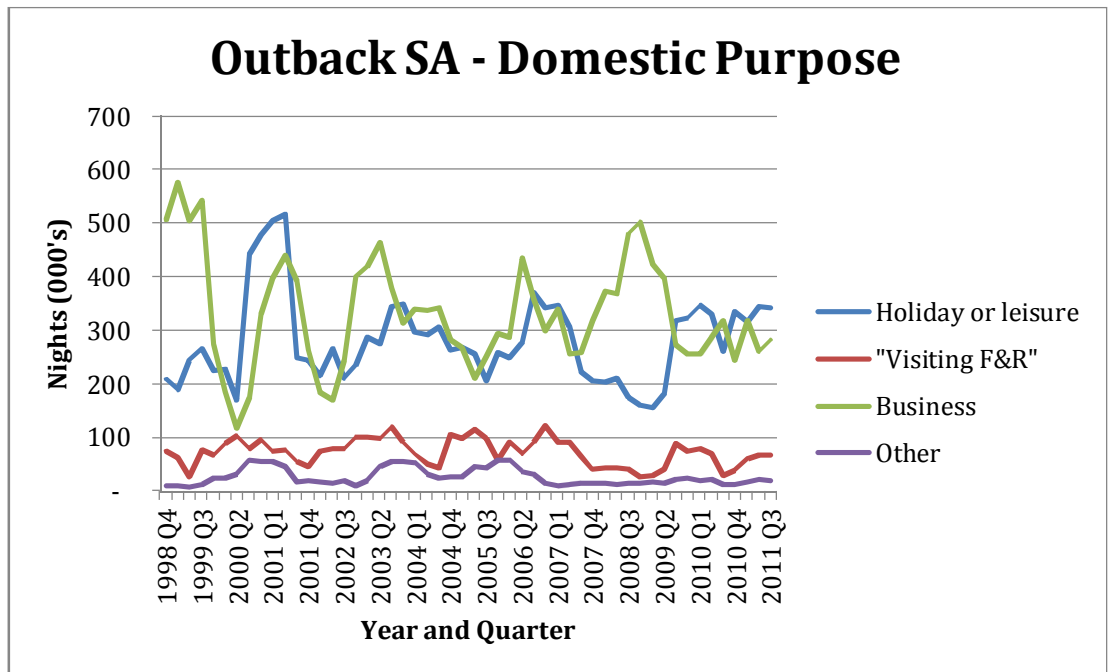


Insights:

- Spike in 2001, 2003, 2006
- Reasonably steady 2009 – 2011

Domestic Purpose

Rolling annual 1998 – 2011, reported quarterly



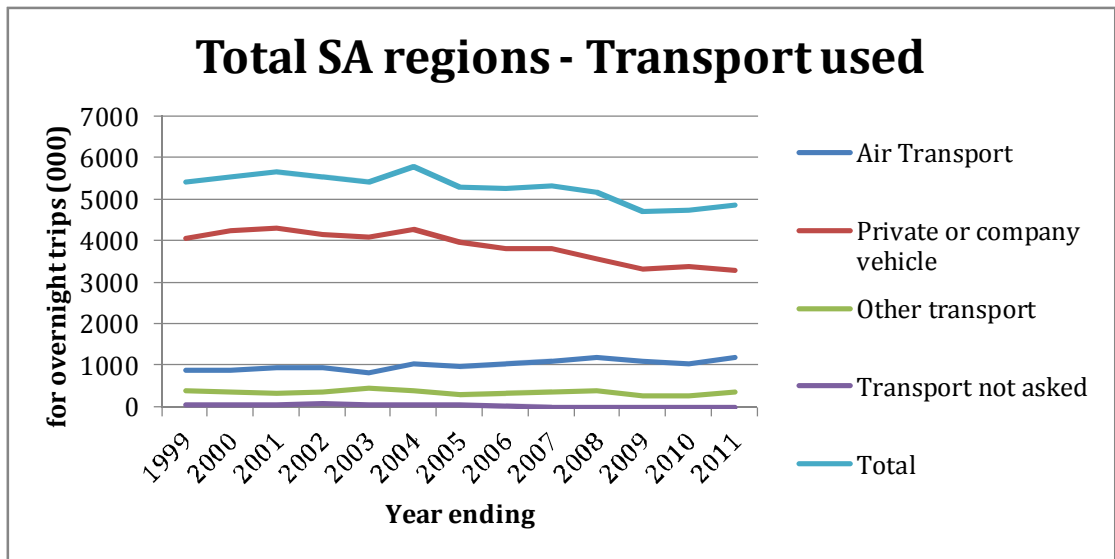
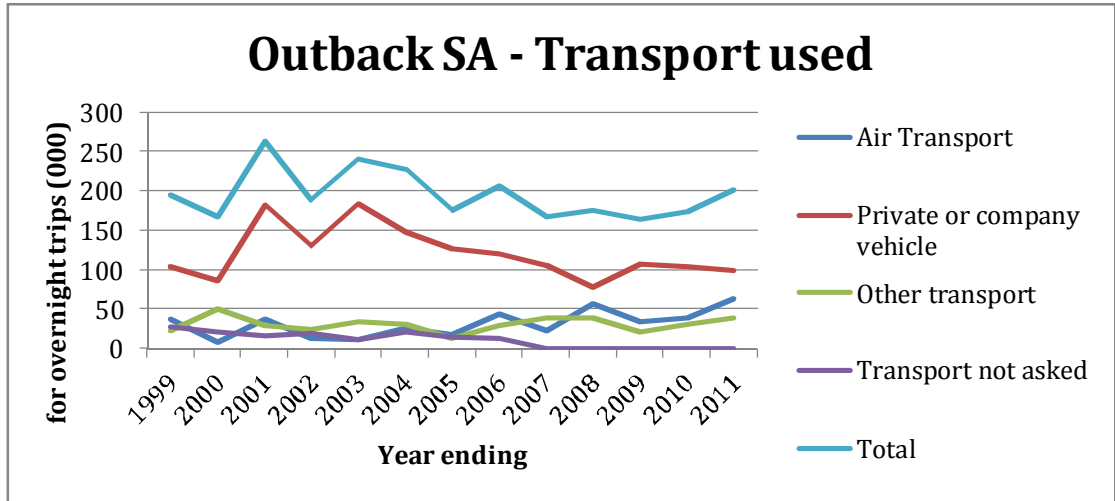
Insights

- Business spikes in 1999, 2001, 2003, 2006, late 2008

- Holiday or leisure spikes 2001, 2003, 2006, 2009/10

Transport used

Overnight trips 1998 onwards



Insights:

- Ratio of air to vehicle not as constant in Outback as compared to state average
- Outback SA air spiked in 2006 without a spike in vehicle
- Outback SA air possibly spiking a present while vehicle is steady/slightly declining

Activities undertaken - Overnight trips 1998 onwards

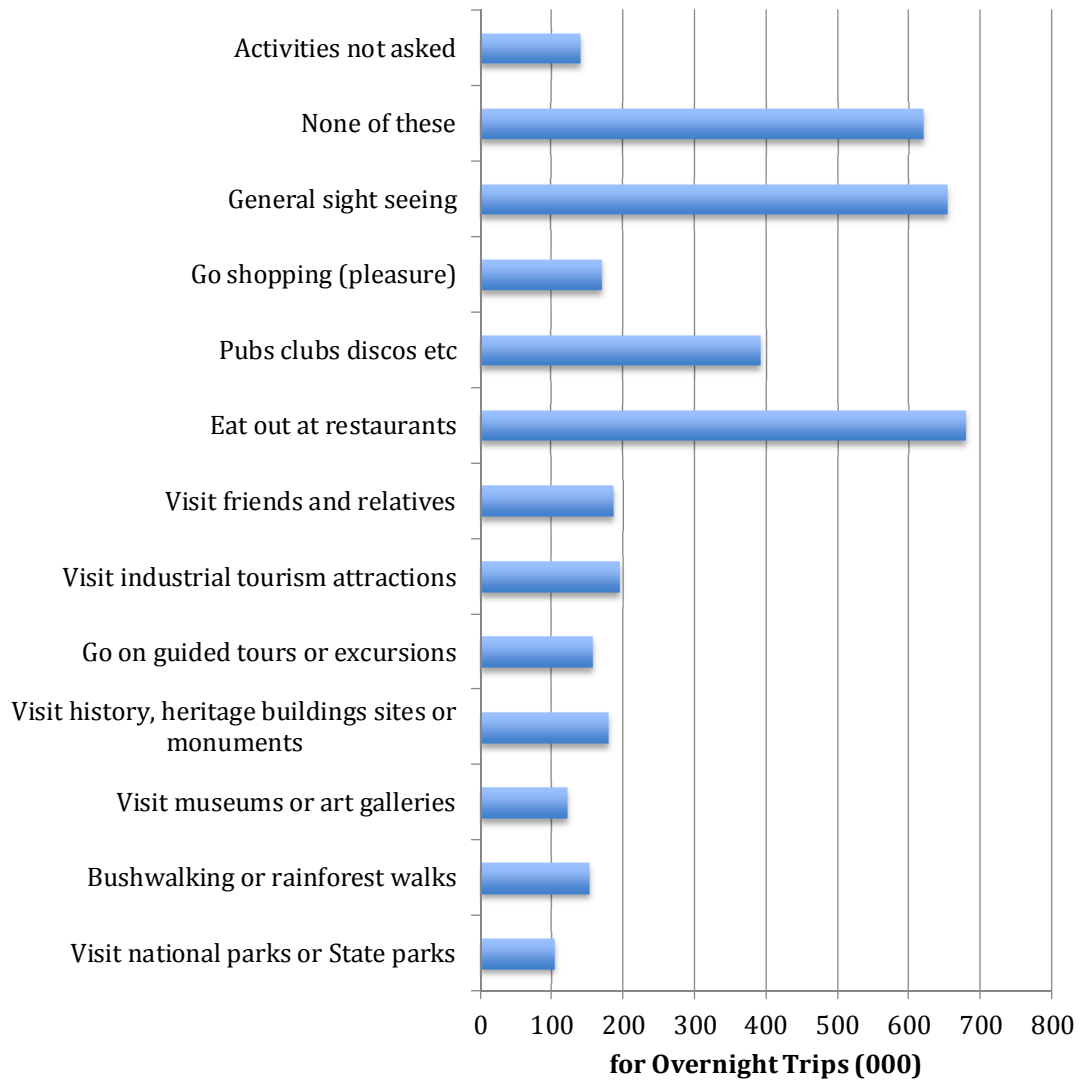
Activities undertaken can refer to any activities on the entire trip; they may not have been undertaken in the Outback, but possibly in some region or destination on the trip.

A full list of the 51 activities can be viewed in Appendix C - Outback Data (Feb. 2012) (Source: Tourism Research Australia).

Only activities with over 100,000 responses over the 10-year period 2002 – 2011 have been highlighted in the following SA Outback summary chart.

Please note these activities have been undertaken by visitors that have been to the Outback at some stage during their trip. The selected activities were undertaken on their overall trip to SA, therefore not necessarily while in the SA Outback. The below provides a reflection of the type of activities that appeal to visitors who visit the region.

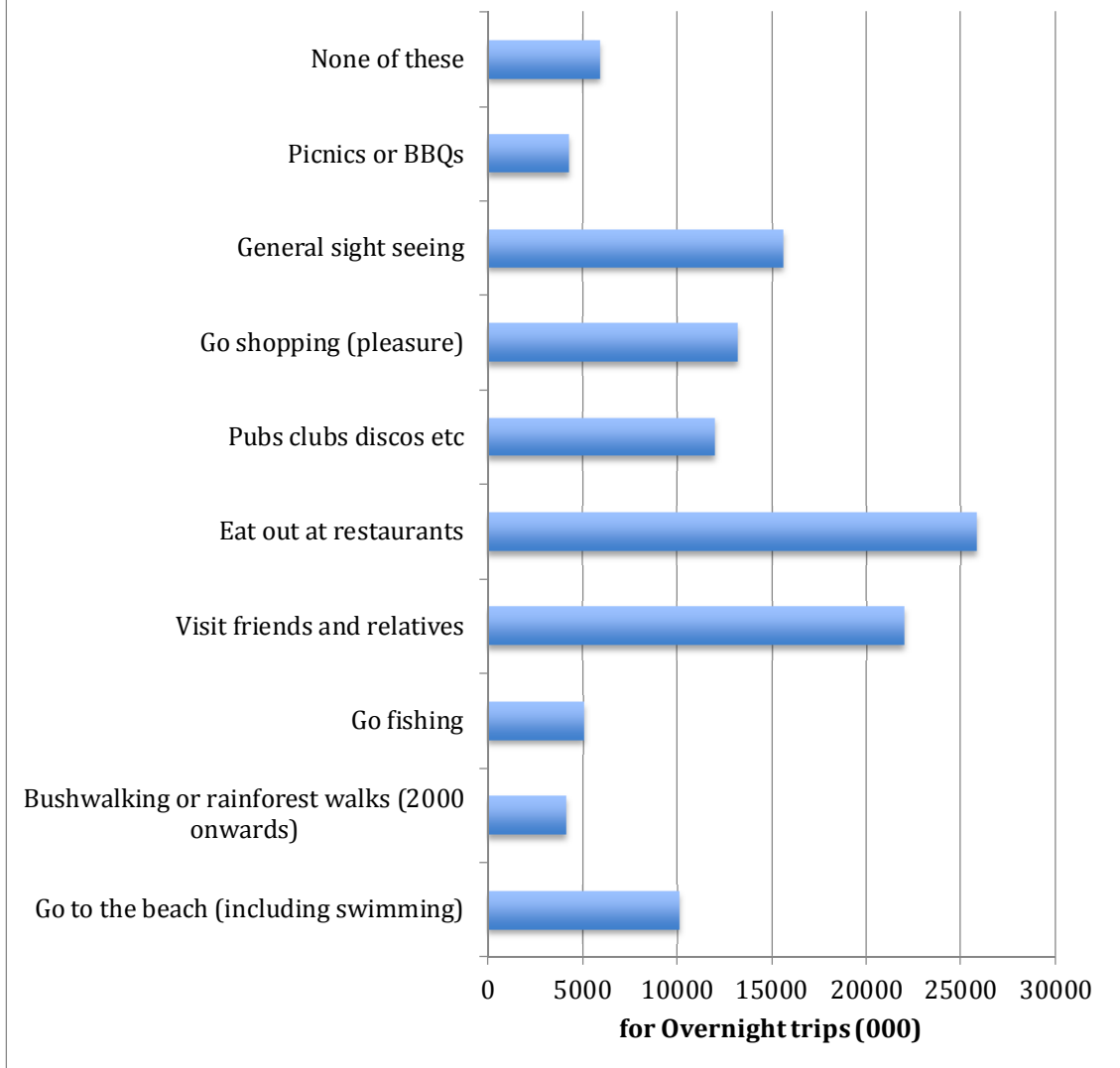
Outback SA - Activities undertaken 2002-2011



Insights:

- Key activities include:
 - Eating out at Restaurants
 - General sightseeing
 - Pubs, clubs and discos

SA Total - Top 10 Activities undertaken 2002-2011

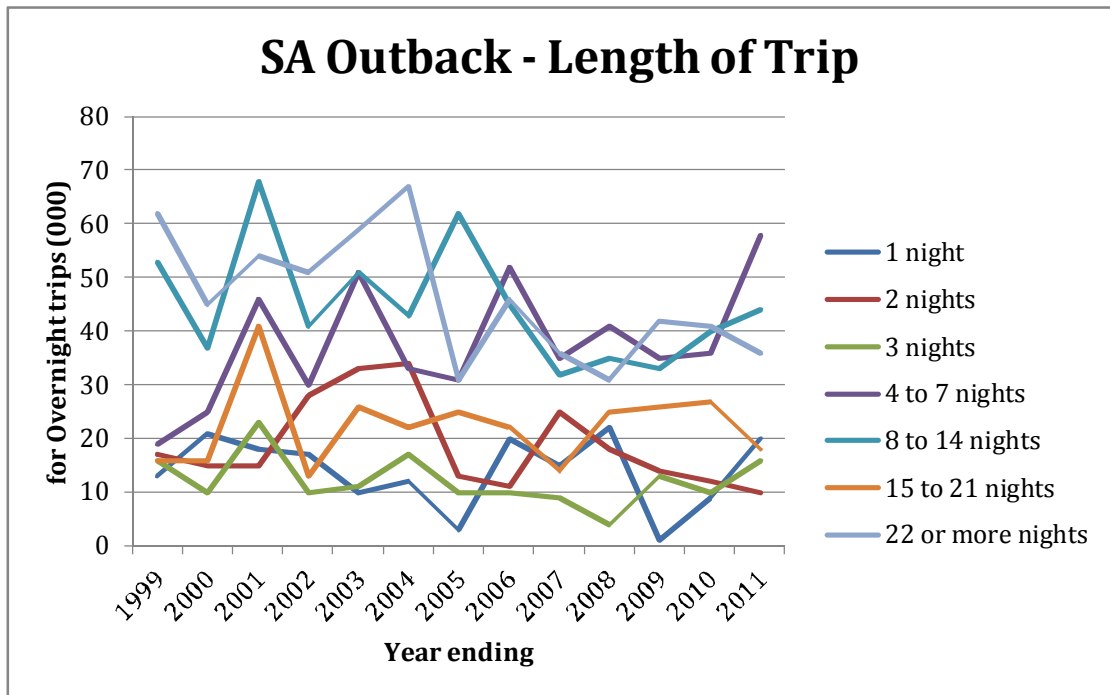


Insights:

- Unique activities which appeal to SA Outback visitors:
 - Visit industrial tourism attraction
 - Go on guided tours or excursions
 - Visit history, heritage building sites or monuments
 - Visit museums or art galleries
 - Visit national parks or State parks
- Picnic and BBQs on top list in state, also featured as an activity in SA Outback but not as highly rated. Perhaps an opportunity to improve these facilities?

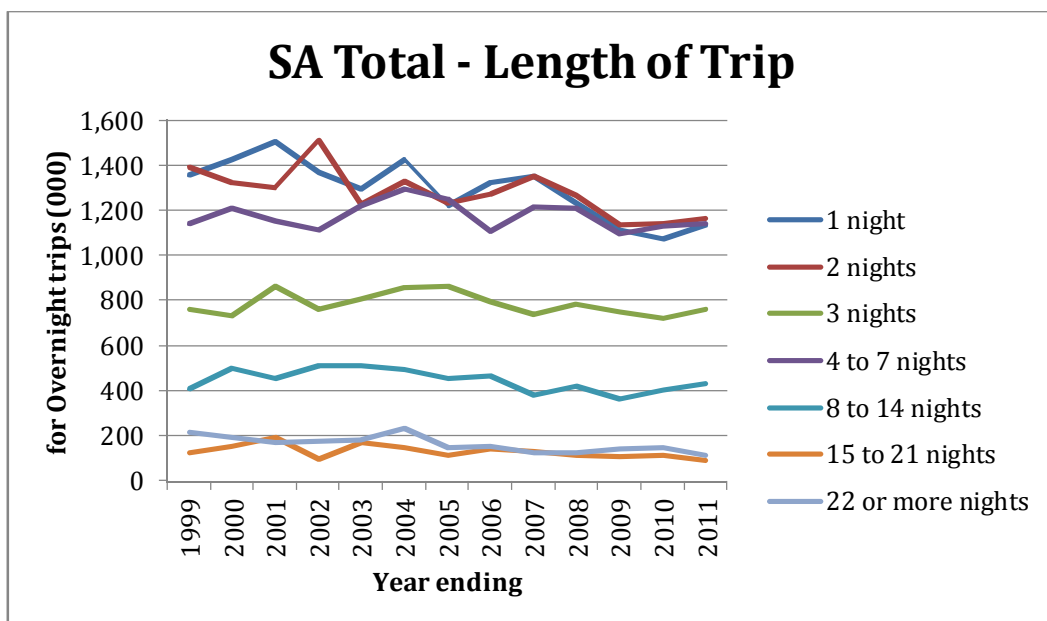
Length of trip

Overnight trips 1998 onwards



Insights:

- No clear patterns of length of stay
- Majority 4 - 14 nights and 22+ nights
- Current rise of 4 - 7 nights

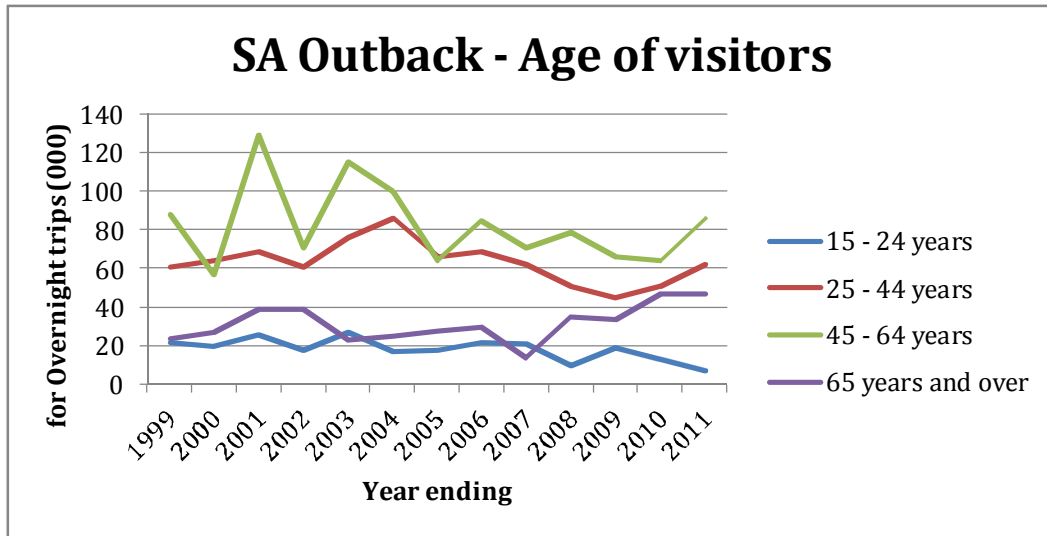


Insights:

- SA total much more predictive
- Average length of trip lower than SA Outback

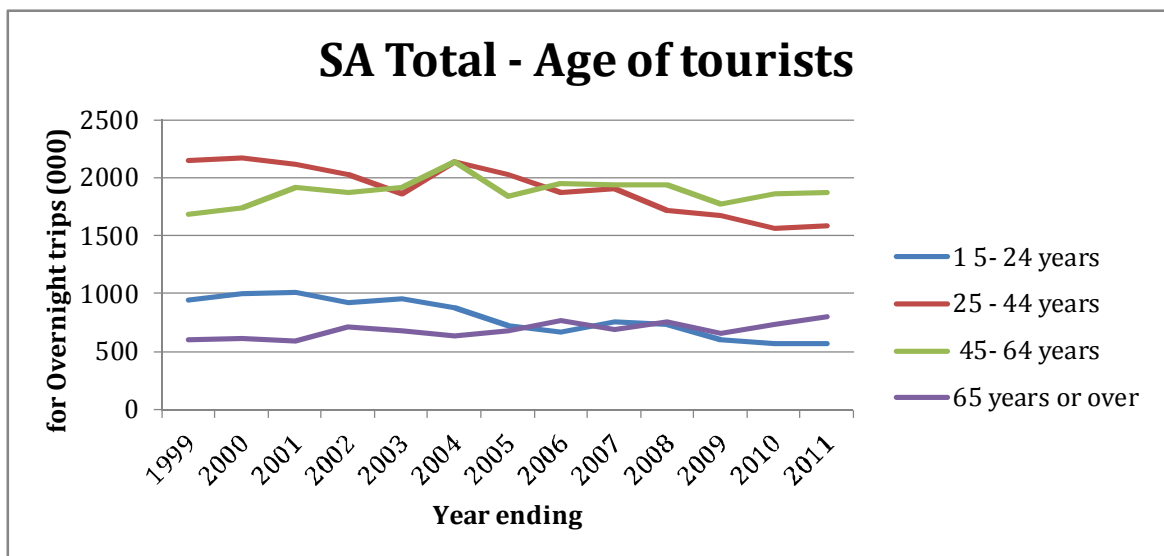
Age of visitors

Overnight trips 1998 onwards



Insights:

- Majority of tourists are 45 - 64 years
- Tourists 65 + are increasing



Insights:

- The average age of tourists state-wide is much more consistent than in SA Outback which does have some movement
- SA outback trends for an increase in 65+ is much stronger than the State average

SWOT ANALYSIS

Strengths	Weaknesses
<ul style="list-style-type: none"> • Remote, isolated, under-populated • Unspoilt natural environment • Natural highlights, e.g. Simpson Desert, Lake Eyre, Cooper Creek, mound springs, Dalhousie hot springs, Great Artesian Basin, Coongie Lakes, etc. • Historic tracks (Birdsville, Oodnadatta, Old Ghan Railway, 'bomb' tracks, Strzelecki, etc) • Generally accessible due to dry climate • Pioneer and heritage stories (indigenous trade routes, Tom Kruse, Len Beadell, Burke & Wills, etc) • Unique outback communities • Coober Pedy (opal story, infrastructure and services) • Location between Flinders Ranges and Red Centre • Supportive organisations in the region (RDAFN, OCA, Roxby Downs and Coober Pedy Councils, Wadlata, etc.) • Numbers of external operators (air and ground) operating into/through the region • Periodic Lake Eyre/basin flooding (brings birdlife and media interest) • Current SATC Destination Action Planning • Unique product/experiences (e.g. Mail Run Tour, Arabunna Tours, Arid Recovery Reserve, Coward Springs Camel Tours) 	<ul style="list-style-type: none"> • Road closures during wet periods (lack of all-weather roads) • Limited indigenous product/experiences • Limited Food & Wine experiences • Limited mobile phone coverage • Inadequate capacity (accommodation, services, product, infrastructure, workers) to cope with high influxes of visitors • Under-developed national parks (camping facilities, interpretation, walking trails, roads) • Inadequate facilities for travelling public (road-side rest areas, public toilets, emergency phone coverage) • Lack of population & business numbers/capacity to support a RTO • SATC-SA government lack resources to provide infrastructure improvements • Dry Lake Eyre lacks market 'appeal' in comparison to wet Lake Eyre • Limited upmarket (4-5 star) accommodation • No defined and articulated SA Outback brand presence • Limited co-operative tourism industry initiatives

Opportunities	Threats
<ul style="list-style-type: none"> • High profile (nationally) created by wet Lake Eyre media coverage • Partnerships with Flinders Ranges operators (marketing/training) • Brand development for the SA outback region • Packaging the regions interpretation into a readily accessible contemporary format (electronic, web, CD-DVD) • Resources-mining sector (financial partnerships/new product) • Marketing, networking, training partnerships with other outback regions • Lobbying government and agencies to move outback priorities 'up the list' (e.g. rest areas, PAR improvements) • Grow numbers of Tourism Accredited operators • Unique new product, e.g. Outback Pubs 'Signature Dish' Trail • Build the capacity (take to a new level) existing appealing product/experiences • Conservation areas in private ownership • Leverage promotional activity surrounding Explorer's Way 	<ul style="list-style-type: none"> • Competition from other outback regions/states • Competition from overseas (i.e. domestic market travelling o/s due to strong \$A and cheap airfares) • Negative word-of-mouth by visitors about expectations not being met • Lack of operator/industry collaboration • Poor management and/or facilities driving away external operators (e.g. poor facilities at Marree Airport) • Operators pulling out of region when Lake is dry • Small local operators ceasing their side-line tourism operations • Poor performing Australian economy • Changing attitudes to travelling/ change spending patterns re disposable income • Climate change (drier or wetter Lake Eyre Basin? – could be an opportunity)

DISCUSSION AND RECOMMENDATIONS

Experiences

Question: List in descending order (the top experience first, second best experience second, etc) what you believe are the top five tourism experiences available in the South Australian Outback region (excluding Flinders Ranges) Feel free to nominate a general experience, such as '4WD'ing across the Simpson Desert', or you may want to nominate an outstanding tourism business.

Operators survey responses summary	OWP survey responses summary	Combined responses
<ul style="list-style-type: none"> • 48 points – Lake Eyre (mainly flights over Lake Eyre, self-drive, and Lake Eyre Yacht Club) • 26 points – Birdsville and Oodnadatta Tracks • 22 points - Simpson Desert (4WD crossing) • 22 points - Coongie Lakes, Cooper Creek, Channel Country, Innamincka, • 18 points - Coober Pedy (includes opal mining, Old Timers Mine and Breakaways) • 9 points – Marree (classic outback, Arabunna Tours, history) • 5 points - Painted Desert-Arckaringa Hills • 3 points - Outback Pubs • There were 17 other single responses, of which 9 were nature experiences and 4 heritage attractions 	<ul style="list-style-type: none"> • 31 points – Birdsville, Oodnadatta and Strzelecki Tracks (self-drive; bush-camping, experiencing nature and changing landscapes, history and heritage) • 31 points – Coober Pedy (opal industry, dugouts, history, 'noodling', surrounding attractions, opal festival) • 24 points – Lake Eyre (flights, self-drive, tours, dry or wet) • 11 points – Coongie Lakes, Cooper Creek, Channel Country, Innamincka • 10 points – Simpson Desert • 8 points – Dalhousie Springs • 6 points – Outback Pubs • 5 points – Painted Desert-Arckaringa Hills • There were 11 other single responses, of which 5 were nature experiences and 3 heritage attractions 	<ul style="list-style-type: none"> • 72 points – Lake Eyre (flights, self-drive, tours, dry or wet) • 57 points – Birdsville, Oodnadatta and Strzelecki Tracks (self-drive; bush-camping, experiencing nature and changing landscapes, history and heritage) • 49 points – Coober Pedy (opal industry, dugouts, history, 'noodling', surrounding attractions, opal festival) • 33 points – Coongie Lakes, Cooper Creek, Channel Country, Innamincka • 32 points – Simpson Desert • 10 points - Painted Desert-Arckaringa Hills • 9 points – Outback Pubs • 9 points – Marree (classic outback, Arabunna Tours, history) • 8 points – Dalhousie Springs • There were 28 other single responses, of which 14 were nature experiences and 7 heritage attractions

Question: Do you see any viable (able to soon be profit making) business opportunities in the SA Outback? (i.e. no one is doing it at present or it is being very poorly done.)

OWP survey responses summary	Operators survey responses summary
<p>The following are some of the ideas that may have potential regardless of whether we have a wet or dry Lake Eyre?</p> <ul style="list-style-type: none"> • <u>Contract for maintaining park bays</u> - but reliant on them being established first • <u>Cooper Creek water cruising</u> - an existing local business is currently seeking approvals to establish water cruises at Innamincka promoting Burke and Wills history and talking advantage of the extra visitors the sealed road from Queensland brings • <u>Outback Pub Route/Trail</u> - it's already half way there with The Outback Loop! • <u>Big Mine Tours</u> - obviously requires the mines cooperation and support. Olympic Dam has one. Challenge is to identify a readily accessible (close to main road route) mine operator willing to participate. Remember 'tourism' is far from mining core business! • <u>Volunteer tourism in National Parks and Arid Recovery</u> (eg visitors help with maintenance of historic buildings and structures or monitor endangered species) - It's probably being done in places but could be expanded? 	<ul style="list-style-type: none"> • Marree <ul style="list-style-type: none"> ○ Better café/restaurant/bakery ○ Better accommodation ○ Local tour guide ○ Self-guided walks – possibly train locals to implement ○ 4x4 touring of immediate region ○ Tourist booking centre • Lake Eyre <ul style="list-style-type: none"> ○ Ground touring ○ Water sports ○ Camping facilities on the edge of the Lake ○ Airstrip in the middle ○ Dinner in the saltpan, guests transferred by helicopter/aircraft/4WD ○ Adventure tourism – fishing, canoe, bush walking etc • Outback Cattle Station fly in/out short duration holidays • Arid Recovery Caravan/Camping ground and function rooms for meetings and events • Tours into Moomba and the oil/gas operations • Outback Film Museum in Coober Pedy

It is clear from the preceding tables that the strength of the SA outback region lies in its relatively unspoilt and unpopulated natural environment, i.e., the *self-drive journey, bush-camping, being immersed in the natural environment* and in recent years the *appeal of Lake Eyre flooding* (experienced by air or ground).

In addition, Coober Pedy has great appeal with visitors as an outback 'frontier town', with its unique underground dugouts, opal mining heritage, 'colourful' characters and history, harsh yet attractive natural environment and good level of attractions, services and facilities.

The region is rich in pioneering achievements and history. These stories appeal to visitors as they travel through the region and trace the footsteps of pioneers. However there is an opportunity to share and tell these stories more effectively than is presently the case.)

In summation, the responses about experiences indicate the region is strong with *nature, outback* and *journey* experiences, but is weak in *Indigenous*, and *food and wine* experiences.

In terms of developing new product and experiences it is pointed out that the region generally lacks population; much of it is '*unincorporated*' (so lacks a local government, i.e. a body that may develop tourist infrastructure and facilitate the development of new attractions); and the state government lacks the financial capacity (at present) to invest heavily in the region. With the region being remote and lacking numerous services it would be difficult to attract a workforce and it may be '*a hard sell*' to attract new tourism business investors (?)

Logic suggests the region focus on developing its tourism industry experiences and product by;

- Leveraging its geographic position as a link between the Flinders Ranges and Red Centre national landscape tourist regions; existing strong domestic 4WD market; and under-exploited history to develop tourist drive routes with a view to keeping increasing numbers of visitors circulating within and across the region (to support existing retail and tourist operation businesses)
- Take advantage of the SE Queensland outback road to the SA border (near Innamincka) being sealed and bringing more drive tourism to the region
- Assisting local operators (who clearly already have a passion for and commitment to the region) to develop their businesses further, generate more income, employ more people, contribute more to the local economy (An example is the new network of SA Station Stays in the Outback and Flinders Ranges, where pastoral property owners providing tourist accommodation are working cooperatively in marketing, i.e. logo development, a new website, new hardcopy publication & distribution, promotion at consumer shows, etc. (It is also noted that the Arabunna people of the Marree-Oodnadatta-Lake Eyre area have just had a successful resolution of a native title claim over a large portion of the region. It has been suggested by Pat Katnich – member of the OWP, that this may clear some land access and tenure issues at Finnis Springs Station and provide new opportunities for the Arabunna people to develop new indigenous tourism product)

- Facilitate creative solutions to developing new experiences, product and services (whilst remaining conscious of the desire to provide *'genuine'*, *'immersive'* opportunities for the visitor to experience outback culture and the environment, rather than *'detached'*, *'superficial'* or *'fabricated'* experiences), e.g. the Flinders Ranges and Outback SA Region Integrated Strategic Tourism Plan 2008-2014 mentions *'Outback Pubs - If there is one product that has universal appeal across all markets this is it. Everyone enjoys a counter meal, a cold beer and a yarn at the bar or around the fire. The food needs to be well cooked, value for money and most importantly the service needs to be warm, welcoming and attentive.'* It may be a small step to take advantage of the regions hotel assets to build a new *food and wine* experience?

Recommendation 1: An Outback Food and Cocktail experience (or similar) be developed and marketed, based on participating hotels providing a signature dish and cocktail particular to/linked to the region. (For example, *'The Simpson'* could be a char grilled camel steak; most people have heard of a *'grasshopper'* cocktail, *'The locust'* may be a SA outback derivative?)

Recommendation 2: Investigate opportunities for developing tourism at privately owned conservation areas, e.g. Kalamurina, Witchelina and Bon Bon stations (owned by Australian Conservancy, Aust Nature Foundation and Bush Heritage?)

Recommendation 3: Marree Progress Association be encouraged to facilitate the development of a local (town) heritage walking trail.

With the intention to not necessarily create a new service or cost to the industry, but to package and market existing services to operators in the region, consider allocating a small monetary assistance program to facilitate an operator undertaking tourism accreditation? For example, RDAFN may be able to provide some business review and mentoring services through its Business Advisor; SATC may provide assistance through Tamara Modra for businesses to improve their internet presence; a small pool of funds may be developed to subsidise Tourism Accreditation programs, is there an opportunity to facilitate an ongoing mentoring program, etc.? It is suggested this business development package be suitably attractive to be made

available to a few (e.g. 4 – 6) key businesses through an application and selection process.

Recommendation 4: Stakeholders (SATC, RDAFN, FROSAT, OWP, SATIC) develop and administer a package of business development assistance to selected local operators.

With the strength in numbers of external ground operators travelling into the region and suggestions about a lack of upmarket accommodation in the region; combined with the desire to ‘immerse’ visitors in the outback environment; it is pointed out that *there is no reason sleeping in a swag or tent can't be a 4 or 5 star accommodation experience!* This observation would seem to align with the growth in both standards and numbers/sales of mobile homes, off-road caravans and camper trailers over the past decade, as travellers seek to have the best of both worlds, i.e. *comforts of home and freedom to travel/discover* (including flexibility in setting/altering their itinerary).

Recommendation 5: Investigate opportunities/options to grow the standards of accommodation, food and wine, and service provided by external (and internal) tour operators (transition to higher yield customers) (*‘There is no reason sleeping in a swag or tent can't be a 4 or 5 star accommodation experience!’ may be an interesting starting point?*)

Tourism Research Australia statistics show that the key methods of transport used over the last 10 years have clearly been air transport followed by private or company vehicle. This suggests that coach tourism into the region is limited (also supported by the desktop audit which reveals few coach operators). However as the age of tourists has steadily increased over the last 4 years in the 65 years and over bracket, coach tourism may be an opportunity for growth in the near future as mature tourists become less confident in their diving capabilities and yet are still young at heart and have the desire to explore their country. If coach tourism provides a more economical option than air tourism, mature tourists may also be influenced by their concern over financial security given concerns over superannuation returns in the current economy.

Recommendation 6: Conduct further research into coach tourism opportunities. Discuss potential with operators and consider market research into key target markets.

The research shows that tourists are attracted by the isolation of the SA Outback and ability to get off the beaten track; it is highlighted by one operator that the SA Outback offers a more remote experience than the other states. This position should be leveraged by appropriately developing experiences that add to this experience, which are likely to be out of the townships and offer a unique, powerful experience. These could be activities from self-drive 4WD, to camel riding, to unique picnic and camping experiences. Invest in activities which add to this level of experience.

Recommendation 7: Invest in experiences that promote and highlight the remoteness and isolation of the region

The strength of the 4WD adventure market (consistent visitors) in both dry or wet years (and opportunity to grow this market) is apparent. Research revealed several opportunities (many lower cost) to expand related experiences, i.e.

- More local 4WD tracks (e.g. a short test tracks to challenge drivers and vehicles) (Oodnadatta has one. This may be something local Progress Associations are encouraged to investigate/develop?)
- Crossing the Simpson Desert is not as environmentally unfriendly as some may imagine, with impacts being quite manageable. The Desert Parks District Ranger indicated opportunities to build the shoulders of the current season could see twice as many vehicles/people enjoy the experience
- 4WD driver training and off road motor-cycle (dirt bike) tours are related markets suggested as having growth potential
- As marketing the Explorers Way is being given new attention from the SATC, particularly in linking with the NT and Victoria to provide a great south-north transcontinental drive experience, it is suggested the 'Old Ghan Heritage Trail' be similarly 'refreshed' with a view to providing an alternative south-north transcontinental route for the 4WD adventure market, when linked with the NT's Binns Trail. (Note: the Old Ghan Heritage Trail route links the Flinders Ranges and Red Centre national landscape regions)

Recommendation 8: Investigate the viability of/opportunities to refresh information about and promotion of the Old Ghan Heritage Trail 4WD route (linking to Binns Trail at Mt Dare)

The combined responses to the survey question about top experience unsurprisingly highlights key experiences such as Lake Eyre, the various tracks and Coober Pedy which have been developed and received significant investment over the last 10 years. The next highest rated area including Coongie Lakes, Cooper Creek, Channel Country and Innamincka could potentially provide fertile ground for new and exciting opportunities, having received less focus in recent years. With the increased access through Queensland, and close proximity to the Eastern states, it provides an area of potential.

Recommendation 9: Explore opportunities to develop new tourism product and experiences through the north-eastern outback area including Coongie Lakes, Cooper Creek, Channel Country and Innamincka

This report considers insights on tourism statistics and operator feedback, however further insight is required from the consumers in segmented categories, to inform any further recommendations on new experience and product development. Key potential segments to gain insight from would include Retired 65 and over, Families, Incentive market and tourists from the industrial sector (eg Miners).

Recommendation 10: Conduct consumer research on key segments to ascertain desired experiences and possibly test new experience/product initiatives. (This could be integrated with the marketing recommendation on consumer research)

With the wet Lake Eyre phenomenon growing air tour operations in and into the region substantially over the past 3 years, exposing new operators and markets to the SA outback, it is appropriate to endeavour to maintain this flow of activity and dollars into the area. Air operators have expressed a strong desire for management and infrastructure issues to be improved at local airports, they consistently point out that *improved customer service*, and *need for new on ground product* are key barriers to attracting tourists (and therefore issues the region needs to address). These issues are considered in other recommendations presented in this paper.

Infrastructure

Question: List up to 5 infrastructure improvements you would like to see in the Outback (that are going to improve tourism business and experiences), in descending order of priority

Operators survey responses summary	OWP survey responses summary
<ul style="list-style-type: none"> • Road issues (varying from seal a Lyndhurst-Marree or Marree-Roxby Downs loop or Birdsville Track; improve PAR (Public Access Roads/Routes) access to Lake Eyre; National Parks improve roads to Burke and Wills sites; seal 32km Breakaways Loop at Coober Pedy; larger ferry for flood access across Cooper Creek on Birdsville Track; improve gravel Oodnadatta Track; make Simpson Desert Crossing one way) • Airport issues were nearly as significant an issue with the management and lack of facilities at Marree Airport being the main concern (5 comments – take back from progress association, needs toilets and terminal, needs improved refuelling, increased plane parking space and helicopter pad). There were 2 comments that runway/airport extensions at Hawker, Leigh Creek and Coober Pedy would allow for larger planes. • Toilets were also a big concern. Suggestions were made for toilets needed along the Oodnadatta Track & Birdsville Track, at Cordell Downs, Marree Airstrip, edge of Lake Eyre, a toilet dump for planes at Coober Pedy, more public toilets needed. One response said ‘no public toilets’ or ensure they are cleaned and not used as overnight camping spots) • The need for telling history/heritage stories was well recognised, e.g. more interpretive signage at Birdsville Track, Breakaways, throughout the region; a Marree Afghan Museum; keeping the Ghan Heritage • New/more overnight Rest Areas required at Stuart Hwy, Oodnadatta Track, picnic areas along Birdsville Track, strategic attractions and main road locations; for both safety and convenience for the travelling public • Improving mobile phone coverage received 2 mentions 	<ul style="list-style-type: none"> • Road issues (varying from seal a Lyndhurst-William Creek-Coober Pedy route; address PAR (Public Access Roads/Routes) on pastoral leases issues, mainly lack of maintenance?; flood access across Cooper Creek on Birdsville Track; reflector posts at some locations, seal problem areas of the ‘Tracks’; creek crossing and floodway improvements) • Numerous new Rest Areas required at strategic attraction and main road locations, for both safety and convenience for the travelling public • Mobile phone coverage (identify and provide at strategic locations) • Signage (better road identification and directional signage; new and more interpretation signage; • Water issues (particularly ‘quality’ in small communities – William Creek, Innamincka, Marree) • Plus other insightful and important infrastructure opportunities were identified, e.g. <ul style="list-style-type: none"> ○ more accommodation options in Roxby Downs (eg camp grounds for RVs) ○ Marree airport, needs better infrastructure for fuel (avgas and JetA1) and new amenities for operators and tourists alike, i.e. toilets, phone, rainwater ○ Tourist information centres in more remote towns such as Marree, William Creek. ○ Innamincka and Oodnadatta airstrip upgrades

Despite ‘road issues’ featuring strongly, there is little consistency in ‘what needs to be done’ from respondents. There is a view from a small number of operators that they would like to see outback roads sealed, e.g. Lyndhurst to Marree; Lyndhurst-Marree-

Roxby Downs loop; Lyndhurst-Marree-William Creek-Coober Pedy loop; Birdsville Track; Breakaways Tourist Drive loop (32km). However there is overwhelming agreement that what is appealing about the SA outback are the famous tracks; the nature experience; the sense of isolation and unspoilt and uncrowded environment. It is deduced that sealing outback roads would destroy much of what is appealing about the region.

The sealing of the Breakaways Tourist Drive 32 km loop, if there are issues with it being regularly closed and an argument can be developed demonstrating the value sealing it will contribute to the local economy, e.g. road maintenance savings, increased access/use contributing to increased overnight stays, etc; appears a project worth pursuing by the Coober Pedy Business and Tourism Association and District Council of Coober Pedy.

Recommendation 11: The Coober Pedy Business and Tourism Association seek District Council of Coober Pedy support to build a business case for the sealing of the Breakaways Tourist Drive 32 km loop road.

In addition to survey responses consultation with SA National Parks confirms that the rough state of tracks on PAR's (Public Access Routes) is an issue, i.e. Halligan Bay access and Level Post Bay access to Lake Eyre and the Pedirka access between Hamilton Station and Witjira NP.

Recommendation 12: The FROSAT Outback Working Party and SATC advocate to state government agencies (and politicians where appropriate) for the allocation of a modest PAR tracks maintenance budget for the SA Pastoral Board, to allow for repairs to particular problem areas.

There are issues of visitors (particularly city people?) being unaware of the state of outback roads and the time it takes to travel them, in particular with tracks that receive little maintenance, such as PAR's.

Recommendation 13: The FROSAT Outback Working Party and SATC ensure relevant visitor information provides information of travel times, including key PAR's. Approach the SA Pastoral Board and Department for Transport seeking signs at key entry points to PAR's advising of the likely track conditions and travel times visitors should allow.

A number of airport/airstrip issues were mentioned. Desires expressed, to extend runways at Coober Pedy, Innamincka and Leigh Creek, really need the development of a business case, given the huge cost of such improvements. The extension of the Coober Pedy Airport would be seen as an initiative the airport owners (District Council of Coober Pedy) would pursue in conjunction with the local community, businesses and mining industry; if deemed appropriate.

The authors have been advised that, as part of the Olympic Dam mine expansion, BHP-Billiton will be lengthening the Roxy Downs airstrip to cater for larger passenger aircraft (?) This will allow for larger (100 passengers plus) aircraft to fly into the region.

Often and consistent were criticisms of the state of the Marree airport terminal and toilet (effectively not operational and a disgrace). Some operators have expressed concern that substantial landing fees have been collected by the Marree Progress Association but not reinvested back into the airport. It is the authors' understanding that an Outback Communities Authority initiative led to the development of an airport management plan for the progress association in 2011. But the detail of this plan and program for implementation is not known. We understand RADFN are currently assisting Marree Progress Association to attract grant funding to improve the airport.

Recommendation 14: The FROSAT Outback Working Party and SATC liaise with the Marree Progress Association and relevant stakeholders, raising concerns identified in this paper (re Marree Airport), with a view to ascertaining what measures are in place to solve the problems (and to facilitate a solution).

Recommendation 15: If earth works are required to develop a new septic system (french drain) at the Marree airport, the FROSAT Outback Working Party and SATC consider advocating for the incorporation of a black-water dump point (for use by motorhomes, caravanners, etc.) at this location at the same time; given there is no black-water dump point at Marree.

The need/desire for both additional rest areas and toilets, particularly along the Oodnadatta and Birdsville Tracks has been identified. It is pointed out that this is already identified in SA Department for Transport strategic planning for rest areas (Roadside Rest Areas Strategy for South Australia, June 2008 - The Department for

Transport, Energy and Infrastructure, Attachment 1 - Summary of Main Improvement Needs), but appears to have not progressed to the stage of addressing tourism industry concerns (?) It is noted 4 public toilets already exist on station properties along the Birdsville Track.

Recommendation 16: The FROSAT Outback Working Party and SATC advocate to the SA Department for Transport (and politicians where appropriate) for raising the priority for establishing rest areas on the Birdsville and Oodnadatta tracks. In addition, raise the issue that mobile phone communications (or as a minimum emergency satellite phone communications) are desirable at such locations for reasons of safety for the travelling public.

The need for additional interpretation signage is also consistently identified. Related to this is the need for additional product, identified during the project. Working on an assumption that tourism signage infrastructure is expensive to establish and maintain, an alternative solution may be information provided in electronic format, (either CD/DVD or via download from the internet), perhaps linked to GPS technology. It is noted that a CD, presenting information on the Birdsville Track already exists, so may be a source of content for a larger regional project (?). It is also recognised that a lot of information exists, but is dispersed across many websites and hardcopy publications, so the task of *'gathering and presenting'* is part of the challenge. As is the collection of oral histories!

It is recognised this is a major project and may need to be staged. It is a project that initially requires development of a concept plan and business case, to enable (for example) applications to potential project partners or funding programs to proceed (i.e. to attract dollars required to progress the project). It is envisaged final product information would include;

- **indigenous and non-indigenous history** of the region
- the **story of 'the tracks'** (Birdsville, Oodnadatta, Strzelecki, 'bomb' roads, cameleers, Overland Telegraph, Old Ghan Railway, Aboriginal song lines and trade routes, the Dog Fence, stock routes, etc.)
- **'iconic' locations** such as Woomera (atomic bombs/defence history), Marree (Old Ghan Railway and junction of Birdsville & Oodnadatta Tracks), Coober Pedy (opal mining story); etc.
- **legends**, e.g. Len Beadell, Tom Kruse, Elliott Price?

- **fauna and flora**
- **contemporary stories**, e.g. Olympic Dam, Crossing The Simpson
- **travel information**, e.g. information on camping and travelling in the outback, availability of water, etc
- **the above linked to GPS readings** and site geographic descriptions (where relevant)

Recommendation 17: The FROSAT Outback Working Party and SATC facilitate the development of a concept plan and business case (can SATC do this ‘in-house’?) for the development of a range of interpretation information for the region in electronic format, (CD/DVD and via download from the internet).

The issue of water quality in some communities is viewed as less important (in a tourism context) in comparison to the preceding issues.

Recommendation 18: To address concerns about potable water availability in some outback locations, all stakeholders should be encouraged to provide better information on-site; in publications; and on websites; about the quality of local water and/or restrictions on availability of potable water (so as to enable travellers to plan for such restrictions). (In addition charging for water in an arid environment is not an unrealistic strategy/action and one would expect heavy water restrictions/conservation measures would be in place, e.g. water timers on showers, water flow restrictors, water recycling?)

It is noted

- the region lacks capacity to fund and service expensive permanent infrastructure
- the cyclical nature of Lake Eyre flooding leads to periodic influxes of tourists and operators
- the existing self-drive 4WD market and numbers of externally based 4WD and coach operators travelling into the region, is strong
- the appeal of the region is its under-populated, unspoilt natural environment.

It may be pointing out the obvious, but infrastructure options need to provide both the capacity for the region to handle seasonal/period fluctuations in numbers and be sympathetic to the natural environment.

Recommendation 19: Investigate further the availability, logistics and cost effectiveness of options such as importing extra transportable ablutions facilities during peak periods; providing increased camping sites and upmarket camp-kitchen facilities (lower cost than new high standard rooms?); upmarket tent style (semi-permanent and temporary) accommodation, etc.

Marketing

<p>Question: In what ways do you think the Outback could improve its marketing activities? (nominate as many ways as you like. You can be general in terms of nominating ways either the region, a town or community, or a consortium of businesses could improve their tourism marketing)</p>	
<p>OWP survey responses summary</p>	<p>Operators survey responses summary</p>
<p>There were not common threads or ideas here (author's interpretation) about from;</p> <ul style="list-style-type: none"> • Strong recognition of the need for improved cooperative marketing and packaging initiatives, and • Although not asked for in the question, numerous views that development of new product is required 	<p>Respondents' recommendations are summarised in order of priority under the following themes:</p> <ol style="list-style-type: none"> 1. Branding & positioning 2. Advertising 3. Target markets 4. SATC involvement 5. Media 6. New product

Of 137 destinations, events, attractions, tours, accommodation operators listed in our audit (Appendix A) about 50 (36%) are listed on the ATDW. With approximately 22 SA Outback business operators on the ATDW, five listed on TXA, and only a select few with professional websites, the online presence of SA Outback as a region is poorly represented to consumers and trade alike. Lifting this presence will not only drive more awareness, desire and increase tourists, but will help to position the region appropriately and encourage word-of-mouth. With the Operators survey showing 30% of leads being generated online and 24% through referral from friends and family, access to accurate, relevant and inspiring information on the region is imperative.

As a result of these findings the key marketing priorities for the SA Outback should be:

1. getting information online and
2. ensuring service meets expectation to encourage referrals.

Research from previous reports identified that domestic consumers use the following means to book (in order of priority); phone, internet and then travel agents, again supporting these key priorities.

With three overarching targets, Consumers, Retail Agents and Wholesalers, it is recommended that Outback SA invest the majority of its resources on the consumer

market which is predominantly domestic, in line with the visitor statics. The marketing activity generated for the direct consumer will have a positive effect on indirect marketing to retail agents and wholesalers.

These top-level strategies can be achieved by implementation of the following recommendations.

Recommendation 20: Improve information available on the region

Recommendation 21: Improve online presence of the region

Recommendation 22: Encourage more Outback Operators to register on ATDW

FROSAT has been the official RTO (Regional Tourism Organisation) for the past decade plus. Its key role is to market the region as a tourism destination, primarily to the intrastate market. FROSAT also undertakes valuable tourism planning, coordinating, administration, and investment attraction activities, but this has been largely reliant on regionally based SATC staff members. The organisation is not membership based, but consists of an appointed board. Formerly the Minister for Tourism appointed the members. Since July 2011 the appointments are made by a selection panel comprising the CEOs of RDA Far North and RDA Yorke and Mid North. The withdrawal of SATC staff from the region in 2011, threatens to reduce strategic activity as a result diminished human and financial capacity.

Over the past decade the Flinders Ranges Tourism Operators Association Inc., a membership based association that advocates for and represents the interests of tourism operators in the Flinders Ranges; has successfully grown to have an important role in developing and promoting the Flinders Ranges as a unique tourist destination.

In early 2012 the Outback Working Party (a FROSAT subcommittee) was established to represent the interests of outback tourism operators and to consider how to facilitate/manage regional tourism initiatives (for the outback). What exists for the OWP (as it does for FROSAT since the withdrawal of SATC staff from the region) are issues including but not limited to time, expense and resources to manage tourism planning, marketing and development in the region.

As has been demonstrated over time there is benefit in the Outback and Flinders Ranges regions working together as one; however this does not mean that the SA Outback should forgo its own brand positioning and messages. While they need to be aligned as a unified region, the personalities of each can and should be differentiated. The region name is Flinders Ranges & Outback. The emphasis should be on the 'And', Flinders Ranges is one area, the Outback is another.

As highlighted by one respondent in the Operator survey, Outback Queensland Tourism Association may provide a good network model to review and potentially adopt to encourage better communication and encourage more strategic relationship potentially resulting in co-operative marketing activities for the region. It may be worth exploring the benefit of broadening the Flinders Ranges Tourism Operators Association (FRTOA) to embrace outback operators and issues, or alternatively expanding the Coober Pedy Business & Tourism Association to take on a regional (outback) role?

Recommendation 23: Refine, consolidate and promote the direction of the local RTO and Operator Association

To assist in increasing operator awareness of regional experiences, developing better relationships between regional operators and activities and potentially encourage entrepreneurial ideas for new development of product, the region could explore the concept and development of an Operator Families Programme.

Recommendation 24: Explore concept of Operator Families Program

As suggested the SA Outback should create a brand presence that is differentiated from Flinders Ranges, while it can still be appropriately packaged within the Flinders Ranges and Outback theme.

Key to achieving this will be consistency, buy-in from all stakeholders for the good of the region and integration by all stakeholders in their various marketing activities and channels.

Identifying key routes and tourism experiences will be an integral part of offering a clear and concise message to consumers and trade alike. With limited time to spark

their interest and convert that into desire to travel, it will be important to not confuse or burden the consumer with various messages.

From feedback received from the Outback Working Party and Operators survey, key routes/experiences/attractions to consider include:

- Lake Eyre
- Self-drive tracks
- Coober Pedy
- Channel Country

However the report also highlights opportunities with:

- Outback pubs
- Explorer's Way route

The more adventurous will use this information as a guide and explore their own personalised route and unique activities, which will add to the adventure of 'getting off the beaten track'.

In developing a marketing plan it will be important to identify the emotional experiences the consumers seek, what do they want to feel? Is it freedom, challenge lifestyle choices, escape, feeling humble? This has been referenced briefly in past reports, however new consumer research may assist in refining this.

A detailed marketing plan would explore this in more detail and define the appropriate positioning and selection of key routes/experiences/attractions, which would inform the regions key messages.

Recommendation 25: Develop a marketing plan for the sub-region of SA outback with recommendations on defined branding and positioning

Recommendation 26: Identify key routes/experiences/attractions and market these consistently

Statistics show that travelling for business purposes is almost as high as travelling for holiday or leisure. Figures are likely to be influenced by the rise in mining within the region; however this presents an opportunity to explore the market in more detail to

ensure they are serviced appropriately. Focused attention on this market may inspire new ideas for experiences and product development as what appeals to them, may be quite different to leisure tourists.

The regions activities and experiences provide unique and challenging ideas which would appeal to the incentive based business tourism market, with a focus on team building and adventure activities, such as 4WDing.

Recommendation 27: Explore business tourism opportunities in more detail. Conduct research to understand the perceptions, experiences, motivations and needs of this sector.

This report's Operator Survey identified that operators estimate 63% of tourists are first timers to the SA Outback, with only 22% coming back for a second or third trip. Unprompted feedback from some operators suggested that they felt that word-of-mouth was not as strong as it could be in attracting tourists to the region, and the statistics suggest they are not influenced to return.

Developing new product and experiences will assist in achieving this; however it will also be important to highlight to tourists the activities available that they may not have time to achieve in their first trip.

A range of strategies could be put in place. Some to be considered include ensuring service levels meet expectations; use of social media, improved understanding within the region of all tourism offerings, strong VIC's and overall improved brand positioning.

Recommendation 28: Explore opportunity for repeat business

Further to feedback from Debra Pietsch at SATC, the closest outback VIC entered in the current pilot program in based in Quorn. As a key source of information, particularly for self-drive tourists, it will be important to increase the skills of local VIC's to increase sales and extend stays. This is supported by an estimated 19% of operators identifying VIC's as a lead source.

Recommendation 29: Identify an Outback VIC to apply for the 'Sell SA Project' in 2013.

A valuable, free resource available to SA Outback operators at present is Tamara Modra, who is assisting business with their online proficiencies. All research and reports have highlighted a key issue for the region is online information and resources for the consumer and industry. It is a high priority for the region and the state to support tourism growth. This initiative by SATC is limited by operator involvement, which has been a barrier to date and the Outback Working Party should be working with Tamara to ensure its success. As an initial step, Tamara could be invited to discuss her role with the group and a copy of the SA Outback Tourism Operators Desktop Audit Results should be supplied as a target list.

Recommendation 30: OWP to engage with SATC Industry Development Executive Tamara Modra

When reviewing infrastructure issues such as internet access and signage issues, think broader than lobbying government for funding solutions. With tightening budgets, it will be imperative to think 'out-side the box' to deliver creative solutions and these could be integrated with marketing strategies.

For example, is there an opportunity to develop a relationship with Telstra to explore their key marketing objectives for the state and regional SA? Is there opportunity for Outback SA to work with Telstra on co-op marketing opportunities to demonstrate how dedicated they are to the outback (if in fact it fits within their objectives and positioning)? Could Telstra be lobbied through a co-op of outback authorities for increased infrastructure and co-op marketing opportunities?

Recommendation 31: Explore corporate strategic relationships to achieve outcomes where government funding is limited.

With two distinct campaigns underway to promote Explorer's Way, the SA & NT campaign and the Great Australian Journey's web platform, there is an opportunity for the Outback Working Party to:

- Support key stakeholders in these campaigns to achieve success
- Encourage participation from the regions operators
- Incorporate outcomes into branding considerations

- Update stakeholders on new initiatives and activities in the region i.e. RTO and Operator association outcomes, branding direction etc.

Additionally there may be opportunity to assist these two campaigns to leverage and integrate with each other, which does not seem to have been considered.

Recommendation 32: Leverage and integrate work completed and in progress for Explorer's Way

With the change in collection methodology of statistics going forward, the region could consider a new process to collect relevant data about the market. A concept to consider would be an online survey sent to tourists approximately one month after their journey (to allow for those who stay longer). Success would be dependent on operator engagement, as it would rely on operators collecting and supplying names and email addresses of their visitors to one source (possibly an online tool). This source would hold the information confidentially and send a standard survey.

The process should avoid online surveys at each operator point, as this could cause frustration of visitors being requested to complete a survey multiple times.

While there are a range of potential barriers to this simple concept, which would need detailed consideration and development, it could provide a valuable, constant source of data for development of strategies and data to support various funding applications. It is not a unique problem to this region, and there may be potential in exploring co-operative partnership with other regions (SA and/or National) in developing a market research solution.

Recommendation 33: Consider developing a consumer research tool for the region

A key issue identified throughout all previous reports and research has been a need to improve the awareness, education and service of tourism operators.

A number of the recommendations above could be addressed by developing an outback SA conference where a number of key stakeholders are invited to address Tourism Operators and update the region on the status of tourism in 2012/13.

Topics/presenters could include:

- Introduction to Outback Working Party
 - Initiate new consumer research project?
- Presentation by SATC
 - DAP
 - Co-op marketing funding
 - Regional Sales Department – Tamara Modra
- Presentation by SATIC – roadshow content
- Great Australian Journey's - Explorer's Way platform info and update
- Interstate Outback RTO/Association best practise case studies
- Workshops
 - Think tank on brand positioning – or present brand already developed
 - Think tank for new product/experience development
 - Benefits of co-op marketing between operators
 - The role of customer service

The conference would be integrated with ample networking opportunities to encourage the building of relationships and exchange of ideas.

Longer term or bigger picture thinking - the conference could be evolved to a National Outback Australia Conference with each state holding a one-day event specifically for their region, and a second day with the combined stakeholders from all regions to discuss industry wide issues for the outback regardless of borders and to encourage networking for improved relationships, co-op marketing efforts, entrepreneurial approaches etc.

Recommendation 34: Develop an Outback SA conference to educate, inspire and engage

Summary – Top 6 Short-Medium Term Priorities

In considering the variety of preceding 34 recommendations the following are the authors views on what are the top 6 short-medium term priorities (not in any particular order of priority) (please refer back to the previous section discussions for an explanation).

- 1) **Recommendations 30, 32, 34 combined to create an informative communication tool to engage with SA Outback tourism operators**
 - Recommendation 30: OWP to engage with SATC Industry Development Executive Tamara Modra
 - Recommendation 32: Leverage and integrate work completed and in progress for Explorer's Way
 - Recommendation 34: Develop an Outback SA conference to educate, inspire and engage (late 2012 would be an ideal time?)

- 2) **Recommendation 4: Stakeholders (SATC, RDAFN, FROSAT, OWP, SATIC) develop and administer a package of business development assistance to selected local operators.**

- 3) **Recommendation 14: The FROSAT Outback Working Party and SATC liaise with the Marree Progress Association and relevant stakeholders, raising concerns identified in this paper (re Marree Airport), with a view to ascertaining what measures are in place to solve the problems (and to facilitate a solution).**

- 4) **Recommendations 21, 25, 26, 27 & 28 combined as an additional marketing planning project (Note: it was always the intention that stage 2 of this project would be development of a marketing plan), i.e.**
 - Recommendation 21: Improve online presence of the region
 - Recommendation 25: Develop a marketing plan for the sub-region of SA outback with recommendations on defined branding and positioning
 - Recommendation 26: Identify key routes/experiences/attractions and market these consistently

- Recommendation 27: Explore business tourism opportunities in more detail. Conduct research to understand the perceptions, experiences, motivations and needs of this sector.
- Recommendation 28: Explore opportunity for repeat business

5) Recommendations 5, 6, 7, 8 & 19 combined as an additional research project (seen as inter-linking issues focussed on increasing 4WD and coach ‘soft-adventure’ grand tours) (maybe SATC can undertake this internally?), i.e.

- Recommendation 5: Investigate opportunities/options to grow the standards of accommodation, food and wine, and service provided by external (and internal) tour operators (transition to higher yield customers) (*‘There is no reason sleeping in a swag or tent can’t be a 4 or 5 star accommodation experience!’* may be an interesting starting point?)
- Recommendation 6: Conduct further research into coach tourism opportunities. Discuss potential with operators and consider market research into key target markets.
- Recommendation 7: Invest in experiences that promote and highlight the remoteness and isolation of the region
- Recommendation 8: Investigate the viability of/opportunities to refresh information about and promotion of the Old Ghan Heritage Trail 4WD route (linking to Binns Trail at Mt Dare)
- Recommendation 19: Investigate further the availability, logistics and cost effectiveness of options such as importing extra transportable ablutions facilities during peak periods; providing increased camping sites and upmarket camp-kitchen facilities (lower cost than new high standard rooms?); upmarket tent style (semi-permanent and temporary) accommodation, etc.

6) Recommendation 1: An Outback Food and Cocktail experience (or similar) be developed and marketed, based on participating hotels providing a signature dish and cocktail particular to/linked to the region. (For example, *‘The Simpson’* could be a char grilled camel steak; most people have heard of a *‘grasshopper’* cocktail, *‘The locust’* may be a SA outback derivative?)

APPENDIX A – Desktop Audit Results (January 2012)

VISITOR INFORMATION CENTRES-ATTRACTIONS

- Wadlata Outback Centre, Port Augusta , Manager Pauline Hedger, phone(08) 8641 9193, email: wadlata@portaugusta.sa.gov.au , <http://www.wadlata.sa.gov.au/>
- Coober Pedy Visitor Information Centre, Coober Pedy, phone (08) 8672 4617, free call 1800 637 076, email: info@opalcapitaloftheworld.com.au , <http://www.cooberpedy.sa.gov.au/site/page.cfm?u=190>
- Roxby Downs VIC, Roxby Downs, phone (08) 8671 2001, email vic@roxbyleisure.com, <http://www.roxbyleisure.com/>
- Woomera Heritage and Visitor Centre, Woomera, phone (08) 8673 7042, local call 1300 761 620, <http://www.woomera.com.au/>

DESTINATIONS (include)

Andamooka; Beltana; Coober Pedy; Glendambo; Innamincka; Kingoonya; Lyndhurst; Marla; Marree; Oodnadatta; Mintabie; Pimba; Roxby Downs; William Creek; Woomera; Yunta

EVENTS

- Andamooka Opal Festival, Andamooka, <http://andamooka.sa.au/> - October long weekend
- Birdsville Races, Birdsville Qld - September
- Coober Pedy Opal Festival (inc Gem Trade Show), Coober Pedy, email: opalfestival@gmail.com, <http://www.opalfestival.com.au> - April
- Coober Pedy Races (horse races), Coober Pedy, contact Peter Rowe, phone (08) 8672 5226, <http://www.cooberpedy.sa.gov.au/site/page.cfm?u=135> – August/October (?)
- Innamincka Picnic Races and Gymkhana - August
- Marla Bronco Branding, Family Fun Day and Ute Show, Marla, contact Alan Fennell – President, phone (08) 8670 7930, email: marlabroncobranding@hotmail.com, <http://www.broncobrandingsa.com/contact> - April
- Marree Camel Races, Marree - September
- Marree Picnic Races and Gymkhana, phone (08) 8675 8203 - June long weekend
- Oodnadatta Races & Gymkhana, Sponsorship & Publicity officer, Hayley Nunn, Macumba Station Via Oodnadatta SA 5734, phone (08) 8670 7801, email: hales_27@hotmail.com, <http://www.oodnadattaraceclub.org.au/aboutus.htm> - May
- Oodnadatta Bronco Branding and Campdraft, Sponsorship & Publicity officer, Hayley Nunn, Macumba Station Via Oodnadatta SA 5734, phone (08) 8670 7801, email: hales_27@hotmail.com, <http://www.oodnadattaraceclub.org.au/aboutus.htm> - July
- Outback Air Race 2102, email: mailto:contact@outbackairrace.com.au, <http://www.outbackairrace.com.au/> - Ceduna-Arkaroola-Innamincka – late August
- The Great Australian Cattle Drive, Oodnadatta, <http://www.cattledrive.com.au/> - July
- The Great Breakaways Bolt (foot races), Coober Pedy - September
- William Creek Campdraft and Bronco Branding, <http://www.williamcreekevents.com/> - August
- William Creek Gymkhana, <http://www.williamcreekevents.com/> - March-April

ACCOMMODATION

- Andamooka Dukes Bottlehouse Motel, Andamooka, phone (08) 8672 7007, <http://www.andamookaopal.com.au/>
- Andamooka Opal Hotel/Motel, Andamooka, phone (08) 8672 7078, <http://andamookaopalhotel.com.au/>
- Andamooka Opal Fields Caravan Park, Andamooka, phone (08) 8672 7121

- Andamooka Progress and Opal Miners Association campground, Andamooka
- Cadney Homestead roadhouse, Mount Willoughby area, phone (08) 8670 7994, email: cadney@bigpond.com
- Clayton Station, Marree, phone (08) 8675 8311, www.claytonstation.com
- Comfort Inn Coober Pedy Experience Motel, Coober Pedy, phone (08) 8672 5777, www.cooberpedyexperience.com.au
- Coward Springs Campground , Oodnadatta Track, www.cowardsprings.com.au
- Desert Cave Hotel, Coober Pedy, phone (08) 8672 5688, www.desertcave.com.au
- Desert View Underground Apartments, Coober Pedy, phone (08) 8672 3330, email; desertviewapartments@gmail.com
- Down to Erth B&B, Coober Pedy, phone (08) 8672 5762, www.downtoerth.com.au
- Eldo Hotel, Woomera, phone (08) 8673 7226 or(08) 8673 7867, Kotara Crescent Woomera SA 5720
- Farina Station, Farina via Lyndhurst, phone (08) 8675 7790, www.farinastation.com.au
- Glendambo Hotel Motel (and caravan park), Glendambo, phone (08) 8672 1030
- Innamincka Hotel, Innamincka, phone (08) 8675 9901, <http://theoutback.com.au/>
- Kingoonya Waterhole (Hotel), Kingoonya, phone (08) 8672 1002, mobile 0429 350 084, <http://www.kingoonya.org.au/>
- Lookout Cave Underground Motel, Coober Pedy, phone (08) 8672 5118, www.thelookoutcave.com
- Lyndhurst Hotel, Lyndhurst, phone (08) 8675 7781, <http://www.lyndhursthotel.com.au/frameset.html>
- Marla Travellers Rest (caravan park), Marla, phone (08) 8670 7001
- Marree Hotel-Motel, Marree, phone (08) 8675 8344, <http://www.marreehotel.com.au/>
- Mount Dare Hotel, Mount Dare (SA-NT border), phone (08) 8670 7835, www.mtdare.com.au
- Mungerannie Hotel, Birdsville Track , phone (08) 8675 8317 www.mungeranniehotel.com.au
- Mud Hut Motel, Coober Pedy, phone (08) 8672 3003, www.mudhutmotel.com.au
- Muloorina Station, via Marree, phone (08) 8675 8386, (08) 8675 8341
- Myall Grove Holiday Park, Roxby Downs, phone (08) 8671 1991, www.aspenparks.com.au
- Oasis Roxby Downs Motor Inn, Roxby Downs, phone (08) 8671 0311, <http://roxbydownsmotorinn.com.au/default.aspx?p=1>
- Oasis Big 4 Tourist Park, Coober Pedy, phone (08) 8672 5169, <http://www.big4cooberpedy.com.au/>
- Oasis Caravan Park Motel and Café, Marree (scenic flights), phone (08) 8675 8352 or (08) 8675 8360, <http://www.marreelakeeyreflights.com.au/lake-eyre-flights/>
- Opal Cave, Coober Pedy, phone (08) 8672 5028, www.opalcavecooberpedy.com
- Opal Inn Caravan Park and Opal Inn Hotel, Coober Pedy, phone (08) 8672 5054, www.opalinn.com.au/
- Pink Roadhouse Oodnadatta (Caravan Park) , Oodnadatta, www.pinkroadhouse.com.au
- Radeka's Down Under Coober Pedy (dugout motel and backpackers) , Coober Pedy, phone (08) 8672 5223, www.radekadownunder.com.au
- Riba's Underground Camping and Caravan Park, Coober Pedy, phone (08) 8672 5614, www.camp-underground.com.au
- Stuart Range Caravan Park, Coober Pedy, phone (08) 8672 5179, www.stuartrangecaravanpark.com.au
- The Underground Motel, Coober Pedy, phone (08) 8672 5324, <http://theundergroundmotel.com.au/>
- Umoona Opal Mine, Coober Pedy, phone (08) 8672 5288, www.umoonaopalmine.com.au
- Underground Bed and Breakfast, Coober Pedy, phone (08) 8672 5301, www.undergroundbandb.com.au
- William Creek Campground, William Creek
- William Creek Hotel, William Creek, phone (08) 8670 7880, <http://williamcreekhotel.net.au/>
- Woomera Travellers Village and Caravan Park, Woomera, phone (08) 8673 7800, <http://www.woomera.com/>

ATTRACTIONS

- Andamooka Opal Fields, Andamooka, <http://andamooka.sa.au/>
- Andamooka Dukes Bottlehouse Museum, Andamooka, phone (08) 8672 7007, <http://www.andamookaopal.com.au/>
- Anna Creek Painted Hills, Anna Creek
- Arid Recovery Reserve, Roxby Downs, phone (08) 8671 8282, <http://www.aridrecovery.org.au/>
- Birdsville Track, Marree-Birdsville, Birdsville Track Audio Tour (1998 production?), Marree-Birdsville, <http://birdsvilletrack.com.au/birdsvilletrack.html>, <http://euobodalla.org.au/birdsvilletracktouristinfo.html>
- Breakaways, Coober Pedy
- BHP Billiton Surface Mine Tour, phone (08) 8671 2001, email vic@roxbyleisure.com, <http://www.roxbyleisure.com/>
- Catacomb Underground Church, Coober Pedy, <http://www.cooberpedy.sa.gov.au/site/page.cfm?u=181&c=405>
- Coober Pedy Opal Fields Golf Club, Coober Pedy
- Coober Pedy Opal Fields, Coober Pedy
- Coward Springs, Oodnadatta Track
- Desert Parks of South Australia; phone (08) 86485300, www.parks.sa.gov.au , includes;
 - Coongie Lakes National Park, Innamincka
 - Innamincka Regional Reserve, Innamincka
 - Lake Eyre National Park, via William Creek
 - Simpson Desert Conservation Park and Regional Reserve, via Oodnadatta
 - Tallaringa Conservation Park, via Coober Pedy
 - Wabma Kadarbu Mound Springs Conservation Park, Coward Springs
 - Witjira National Park, via Oodnadatta
- Explorers Way (Stuart Highway Tourist Route), <http://www.explorersway.com/> , <http://www.adelaidedarwinexplorersway.com/>
- Faye's Underground Home and Opal Mine, Coober Pedy
- Iwantja Arts and Crafts, Marla Bore, phone (08) 8670 7722, www.iwantjaarts.com.au
- Oodnadatta Track, Oodnadatta
- Opalios, Coober Pedy, www.opalios.com.au
- Opal Cave, Coober Pedy, phone (08) 8672 5028, www.opalcavecooberpedy.com
- Painted Desert, Coober Pedy
- Star Opal Fossil Collection, Coober Pedy, <http://www.southaustralia.com/info.aspx?id=9000520>
- Strzelecki Regional Reserve, Innamincka ; phone (08) 86485300, www.parks.sa.gov.au
- Talc Alpha Rink Outback Rep-Public Art Gallery, Lyndhurst, mobile 0429 918 273
- The Old Timers Mine, Coober Pedy, phone (08) 8672 5555, www.oldtimersmine.com
- The Outback Loop, Birdsville and Strzelecki Tracks touring route, <http://theoutback.com.au>
- Tom's Working Opal Mine, Coober Pedy, phone (08) 8672 3966, free call 1800 196 500, www.tomsworkingopalmine.com.au/
- Lake Torrens/The Torrens Track (4WD self-drive route around Lake Torrens), via Andamooka
- Umoona Opal Mine and Museum, Coober Pedy, phone (08) 8672 5288, www.umoonaopalmine.com.au
- Underground Art Gallery, Coober Pedy, <http://www.southaustralia.com/info.aspx?id=9001104>
- Underground Catholic Church of St Peter and Pauls, Coober Pedy, <http://www.cooberpedy.sa.gov.au/site/page.cfm?u=181&c=402>
- Underground Potteries, Coober Pedy, http://australia.shopsafe.com.au/south_australia_attractions/far_north_attractions/coober_pedy/underground_potteries-galleries_museums_collections.htm

- Woomera Observatory (astronomical), Woomera, phone (08) 8674 3227, <http://www.facebook.com/pages/Woomera-Baker-Observatory/237372448278>
- Woomera History Museum, Woomera, phone (08) 8674 3227, <http://www.southaustralia.com/info.aspx?id=9001106>

TOURS (Local Operators)

- Ando Tours (Underground Bed and Breakfast), Coober Pedy, phone (08) 8672 5301, www.undergroundbandb.com.au
- Arid Areas Tours, Coober Pedy, phone (08) 8672 3008, www.aridareastours.com
- Arid Recovery Reserve Tour, Roxby Downs, phone (08) 8671 2001, <http://www.aridrecovery.org.au/>
- BHP Billiton Surface Mine Tour, phone (08) 8671 2001, email vic@roxbyleisure.com, <http://www.roxbyleisure.com/>
- Coober Pedy Tours (includes Radeka's Desert Breakaway Tour), Coober Pedy, phone (08) 8672 5223, www.cooberpedytours.com
- Coward Springs Camel Tours and Safaris, William Creek, phone: (08) 8675 8336 <http://www.cowardsprings.com.au/camel-safaris.php>
- Desert Cave Tours, Coober Pedy, phone (08) 8672 5688, www.desertcave.com.au
- Desert Diversity Tours, Coober Pedy, phone (08) 8672 5226, www.desertdiversity.com
- Faye's Underground Home and Opal Mine, Coober Pedy
- GSL Aviation (operating from Marree), phone (08) 8675 8349, email: ionfo@gslaviation.com.au www.gslaviation.com.au
- GNK Opals Adventure tours, Coober Pedy, mobile 0423 458 850, <http://www.facebook.com/pages/GNK-Opals-Adventure-Tours-Coober-Pedy/243444795700882> <http://www.cooberpedyaustralia.com/coober-pedy-tours>
- Gulf Getaways, phone (08) 8642 6827, www.gulfgetaways.com.au
- Josephine's Gallery & Underground Mine & Museum Tours, Coober Pedy, phone (08) 8672 5931, mobile 0428 356 669, <http://www.cooberpedy.sa.gov.au/site/page.cfm?u=228&c=1124>
- Marree Arabunna Tours (Reg Dodd), phone (08) 8675 8351, email: reg.dodd@gmail.com <http://www.arabunnatours.com.au/splash.html>
- Mail Run Day Tour (Coober Pedy-William Creek-Oodnadatta), Coober Pedy, phone (08) 8672 5226, www.mailruntour.com
- Oasis Tours, Coober Pedy, phone (08) 8672 5169, <http://www.big4cooberpedy.com.au/>
- Oasis Caravan Park Motel and Café, Marree (scenic flights), phone (08) 8675 8352 or (08) 8675 8360, <http://www.marreelakeeyreflights.com.au/lake-eyre-flights/>
- Old Timers Mine Museum Tour, Coober Pedy, phone (08) 8672 5555, <http://www.oldtimersmine.com/>
- Opal Cave Tag-a-long Tours, Coober Pedy, phone (08) 8672 4028, www.opalcavecooberpedy.com
- Radeka's Town & Desert Breakaways Tours, Coober Pedy, phone (08) 8672 5223, www.radekadownunder.com.au/
- Riba's Evening Mine Tour, Coober Pedy, phone (08) 8672 5614, , www.camp-underground.com.au
- Stuart Range Caravan Park, Coober Pedy, phone (08) 8672 5179, www.stuartrangecaravanpark.com.au
- Tom's Working Opal Mine, Coober Pedy, phone (08) 8672 3966, free call 1800 196 500, www.tomsworkingopalmine.com.au/
- Umoona Opal Mine & Museum Tour, Coober Pedy, phone (08) 86725288, www.umoonaopalmine.com.au
- Wrightsair Pty Ltd, William Creek, phone (08) 8670 7962, mobile 0433 767 727, www.wrightsair.com.au
- Wrightsair Pty Ltd - Opal Air Division, Coober Pedy, phone (08) 8670 7962, mobile 0433 767 727, www.wrightsair.com.au

TOURS – AVIATION OPERATORS (external operators)

- Air Adventure Australia, Hamilton Vic, phone (03) 5572 1371, toll free 1800 033 160, http://www.airadventure.com.au/tours_detail.asp?id=41
- Air Central West, Longreach Qld, phone (07) 4658 9187, <http://aircentralwest.com.au/lake-eyre-2-day-tour/>
- Arkaroola Wilderness Sanctuary, phone (08) 8648 4848, <http://www.arkaroola.com.au/flights.php>
- Aus Air Services (operating from Lyndhurst), phone (08) 8675 7781, email: outback@ausairservices.com.au, www.tooradinflyingschool.com.au/lake-eyre
- Australian Scenic Flights, depart Broken Hill, mobile 044 888 5328, http://www.australianscenicflights.com.au/?gc=inc_tours
- Australian Air Holidays, Melbourne (tour ex-Brisbane), phone (03) 9875 1422, toll free 1800 815 906, <http://australianairholidays.com/tour/lake-eyre-brisbane-via-cpd/>
- Australian Air Tours, Brighton-Brisbane Qld, mobile 0412 910 344, <http://australianairtours.com.au/#/lake-eyre-tour/4543046461>
- Banksia Adventures, Adelaide, phone (08) 8285 5033, <http://www.banksiaadventures.com.au/tours/lake-eyre/>
- Birdsville Air Charters, Birdsville, phone (07) 4656 3348, mobile 0408 332 248, <http://www.birdsvilleaircharters.com.au/tours.html>
- Brindabella Airlines, Canberra, phone (02) 6218 2970, <http://www.brindabellaairlines.com.au/charter/lake-eyre-tour>
- Bush Pilots Australia Pty Ltd, Hawker, phone (08) 8648 4444, <http://www.bushpilots.com.au/fly-lake-eyre/>
- Central Air Services (operating from Rawnsley Park), phone (08) 8648 0030, http://www.rawnsleypark.com.au/main/things_to_do/flights
- Central Eagle Aviation, Birdsville, phone (07) 4656 3160, mobile 0431 294 188, <http://www.centraleagleaviation.com.au/>
- Corporate Air Charter, local call 1300 441 000, <http://corporate-air.com.au/aircraft-charter/lake-eyre-flights>
- Chinta Tours, Ceduna (and ex. Adelaide), phone (08) 8625 9051, mobile 0428 244 682, <http://www.chinta.com.au/latestnews.html>
- Dick Lang's Bush Pilots (Desert Air Safaris Pty Ltd), phone (08) 8264 7200, www.dicklang.com.au
- Edwards Aviation Australia, free call 1800 747 800, <http://www.air-charter-australia.com/air-charter-news-views/lake-eyre-charter-flights/>
- Fargher Air, Parachilna, phone (08) 8648 4844, toll free 1800 331 473, <http://www.fargherair.com.au/>
- Goin' Off Safaris, Port Lincoln (flights ex Adelaide), phone (08) 8687 7480, mobile 0428 877 488, <http://goinoffsafaris.com.au/lake-eyre-tour/>
- Heron Airlines, Sydney, toll free 1800 025 261, http://www.heronairlines.com.au/pricing_and_departures/lake_eyre_specials.pdf
- Kirkhope Aviation, phone (03) 9882 4236, mobile 0418 379 263, <http://kirkhopeaviation.com.au/>
- Lake Eyre Tours, toll free 1800 618 876, email: info@lakeeyretours.com.au, <http://www.lakeeyretours.com.au/>
- Outback Air Tours (Peter Wade), Charleville Qld, phone (07) 4654 3033 <http://www.outbackairtours.com/CooberPedy.htm>
- Outback Spirit, Sydney, phone (02) 6049 3500, toll free 1800 688 222, www.outbackspirittours.com.au
- River Country Adventours, Kyabram Vic, phone (03) 5852 2736, mobile 0428 585 227, <http://www.adventours.com.au/flights/eyre.htm>
- Smart Air, Albury-Bathurst, phone (02) 6021 2929, www.smartair.com.au
- Spirit Safaris, phone (08) 8120 0366, local call 1300 763 188, http://spiritsafaris.com/lake_eyre_tours_flights.htm
- Phillip Island Helicopters, phone (03) 5956 7316 ((08) 8675 8344 during winter tourist season), <http://www.tgsaircharter.com.au/Images/Marree.pdf> and <http://www.phillipislandhelicopters.com.au/>
- Vortex Air, Melbourne, phone (03) 8586 7474, <http://vortexair.com.au/>

- Wilpena Pound Resort, phone (08) 8648 0048, email: visitorcentre@wilpenapound.com.au, <http://www.wilpenapound.com.au/scenic-flights/>

TOURS – OTHER (external operators)

- Adventure Tours Australia, Norwood-Adelaide, phone (08) 8132 8200, www.adventuretours.com.au
- Adelaide Sightseeing Pty Ltd, Adelaide, phone (08) 8410 2269, <http://www.adelaidesightseeing.com.au/lakeeyre.html>
- Aussie Heritage Tours; Golden Grove-Adelaide, phone (08) 8289 4191, mobile 0 408 805 428, http://www.aussieheritagetours.com.au/Coober_Pedy_Tours.html
- Australian Guides to Adventure, Brisbane, phone (07) 3883 3554, <http://www.guidestoadventure.com.au/tours/simpson-desert>
- Australian Wilderness Tours, phone (02) 6587 7188, local call 1300 661 229, <http://www.awtours.com.au/special-outback-safari.html>
- APT Australian Pacific Touring, Hampton VIC, phone (03) 9277 8555, www.aptouring.com.au
- Banksia Adventures, Adelaide, phone (08) 8285 5033, <http://www.banksiaadventures.com.au/tours/lake-eyre/>
- Bookabee Tours Australia, phone (08) 8285 5033, www.bookabee.com.au
- Brisbane Hinterland 4WD Tours, free call 1300 787062, mobile 0412 261 593, <http://www.brishint4wd.com.au/3x3.html>
- Desert Sky Tours, PO Box 683, Glenelg SA 5045, Phone (08) 8356 1874 <http://www.desertskytours.com/>
- Diamantina Touring Company, Jamieson Vic, phone (03) 5777 0681, http://www.diamantina-tour.com.au/outback_info/deserts/simpson_desert/intro_simpson.htm
- Gekko Safari, Glenalta-Adelaide, phone (08) 8278 9218 www.gekkosafari.com.au
- Global 4WD Training and Tours, mobile 0407 880 372, http://www.global4wd.com.au/tours/simpson_desert_expedition.php
- Groovy Grape Getaways, Hindmarsh-Adelaide, phone (08) 8440 1640, free call 1800 661 177, www.groovygrape.com.au
- Heading Bush Outback Adventures, Adelaide, phone (08) 8356 5501, <http://www.headingbush.com/>
- Just Cruisin 4WD Tours, phone (08) 8383 0962, mobile 0414 807 891, www.justcruisin4wdtours.com.au
- Misty Mountains 4WD Tours, Wentworth Falls NSW, phone (02) 4757 2278, mobile 0408 263 775, <http://www.4wdtours.net.au/>
- MurrayTrek Outback 4WD Adventure Tours, Mildura NSW, mobile 1800 797 530, http://www.murraytrek.com.au/en/Simpson_Desert.htm
- Outback Aussie Tours, Longreach, local call 1300 787 890, <http://www.outbackaussietours.com.au/>
- Outback Camel Company, Fortitude Valley Brisbane, local call 1300 669 780, <http://www.cameltreks.com.au/>
- Red Earth Expeditions, Adelaide, phone (08) 8271 1315, mobile 0410 567 160, http://www.redearthexpeditions.com/index.php?id_pag=24
- Tag-Along 4WD Adventure Tours Australia, Batemans Bay NSW, phone (02) 4471 1235, <http://www.adventure-tours-australia.com/simpson-desert/index.html>
- Tagalong Tours Australia, Trinity Beach Qld, phone (07) 4057 4096, mobile 0418 787 890, <http://www.tagalongtours.com.au/>
- Trapp Outback Motorcycle Tours, Lismore NSW, mobile 0411 089 498, <http://www.amcr.com.au/pricerates.htm>
- Travel West, Charleville Qld, phone: (07) 4654 3155, toll free 1800 654 541, <http://www.travelwest.com.au/Tours.htm>
- Voyager 4X4 Adventures (inc. Outback Bush Adventures), Sydney, phone (02) 9907 1683, free call 1800 063 363, <http://www.voyager4x4adventures.com.au/simpsondesertguided.html>

- Wallaby Tracks Adventure Tours, Quorn, phone (08) 8648 6655, mobile 0428 486 655, <http://www.wallabytracks.com/wildflowers.htm>
- Young at Heart Holidays, phone toll free 1800 815 906, Email; info@youngatheart.com.au Web: www.youngatheart.com.au
- 4WD Off Road Driver Training, Bowenfels NSW, mobile 0411 243 846, <http://www.4wdoffroad.com.au/featured/simpson-desert-tours/>

RESTAURANTS-CAFÉS-DINING (service station restaurants not included)

- Andamooka Opal Motel/Hotel, Andamooka SA 5722, phone (08) 8672 7078
- Chives Restaurant Roxby Downs, Shop 5, 20-22 Tutop Street, Roxby Downs, phone (08) 8671 1122
- Crystal Café, Coober Pedy, phone (08) 8672 5688, http://www.desertcave.com.au/index.php?c_id=532
- Dunes Café, 7 Richardson Place, Roxby Downs, phone (08) 8671 2001, <http://www.roxbyleisure.com/DunesCafe/aus-Intro.html>
- Eldo Hotel, Woomera, phone (08) 8673 7226 or (08) 8673 7867, Kotara Crescent Woomera SA 5720
- Glendambo Hotel-Motel, Glendambo, phone (08) 8672 1030, www.hotelmotelnetwork.com.au/sa/.../glendambo_outback_resort.ht...
- Innamincka Hotel, Innamincka, phone (08) 8675 9901, <http://theoutback.com.au/>
- Jim & Rachz Outback Restaurant, Coober Pedy, phone (08) 8672 3222, <http://www.jimandrachzoutbackrestaurant.com.au/>
- John's Pizza Bar and Restaurant, Coober Pedy, phone (08) 8672 5561, www.jpbr.com.au/
- Lunch on the Run, Richardson Place, Roxby Downs, phone (08) 8671 2231
- Lyndhurst Hotel, Lyndhurst, phone (08) 8675 7781, <http://www.lyndhursthotel.com.au/frameset.html>
- Marree Hotel, Marree, phone (08) 8675 8344
- Oasis Restaurant, Roxby Downs, phone (08) 8671 0311, <http://roxbydownsmotorinn.com.au/default.aspx?p=1>
- Opal City Chinese Restaurant; Coober Pedy, phone (08) 8672 3188, 5 Wright Road, Coober Pedy, SA
- Opal Inn Restaurant/Bistro; Coober Pedy, phone (08) 8672 5054, www.opalinn.com.au/
- Pie R Squared Bakery, Richardson Place, Roxby Downs, mobile 0403 328 004
- Roxby Downs Tavern, Richardson Place, Roxby Downs, phone (08) 8671 0071
- Roxby Bakery, 20 Tutop Street, Roxby Downs, phone (08) 8671 3340 or (08) 8671 3341
- Roxby Downs Community Club, Burgoyne Street, Roxby Downs, phone (08) 8671 0117
- Roxby Chinese Restaurant, Shop 6, Richardson Place, Roxby Downs, phone (08) 8671 0006
- Simon's Pizzeria, 24-24 Richardson Place, Roxby Down, phone (08) 8671 0222
- Stuart Range Pizza Bar, Coober Pedy, phone (08) 8672 5179, <http://www.stuartrangecaravanpark.com.au/>
- Subway, Richardson Place, Roxby Downs, phone (08) 8671 3383
- Tom & Mary's Greek Taverna, Coober Pedy, phone (08) 8672 5622, <http://www.menueast.com.au/info/7969/tom-and-marys-taverna/coober-pedy/>
- Tuckerbox Restaurant, Andamooka, phone (08) 8672 7137
- Umberto's Restaurant, Desert Café Hotel, Coober Pedy, phone (08) 8672 5688, http://www.desertcave.com.au/index.php?c_id=532
- Underground Cafe & Didgeridoos, Coober Pedy, phone (08) 86725419
- William Creek Hotel, William Creek, phone (08) 8670 7880, <http://williamcreekhotel.net.au/>

TOURISM DEVELOPMENT ORGANISATIONS

Flinders Ranges and Outback SA Tourism (Incorporated Association)

FROSAT has been the key RTO (Regional Tourism Organisation) for the past decade plus. Its key role was to market the region as a tourism destination, primarily to the intrastate market.

The organisation was reliant on SATC staff members to provide administration and marketing services. With the withdrawal of SATC staff from the region in 2011 the FROSAT Board has continued in a much reduced capacity, as the Outback Region considers product development and marketing options/solutions.

In the interim period Regional Development Australia Far North (RDAFN) has stepped in to take up a number of roles/activities previously undertaken by FROSAT staff members.

Outback Tourism Working Party (FROSAT sub-committee)

DRAFT Terms of Reference (as at 15th March 2012)

The Outback Tourism Working Party will:

- *Represent the tourism operators of the Outback region of SA and will act on their behalf to support initiatives and projects and to lift the profile of the region as a premier tourism destination.*
- *Act as a lobby group for tourism operators in the Outback region of SA to assist the Government to make decisions relating to tourism in the long term interest of the State.*
- *Keep operators informed of developments in the Outback region of SA through regular e-newsletter updates according to the Working Party's communications plan.*
- *Regularly report to the SATC and FROSAT Board on projects and status of the Working Party's activities and achievements.*

RDAFN (Regional Development Australia Far North) - www.rdafn.com.au

Regional Development Australia Far North (RDAFN) is a partnership between the Australian, state and territory and local governments to support the growth and development of Australia's regions. RDAFN's board members and staff aim to build partnerships between governments, regional development organisations, local businesses, community groups and key regional stakeholders to provide strategic and targeted responses to economic, environmental and social issues affecting the region.

(Source: RDAFN website homepage)

Flinders Ranges Tourism Operators Association Inc - www.frtoa.com.au/ (Presented as it exists within the FROSAT region)

The Flinders Ranges Tourism Operators Association Inc. is committed to developing and promoting the Flinders Ranges as a unique tourist destination, and advocates for and represents the interests of tourism operators in the Flinders Ranges.

(Source: Hotfrog Business Directory website)

Various town progress associations and business groups, the largest being the Coober Pedy Retail Business & Tourism Association and the Roxby Downs Business Forum

Desert Knowledge Australia - “Our Outback Business Tourism Partnership”

<http://www.desertknowledge.com.au/Our-Programs/Outback-Business-Networks/Our-Outback-Tourism-Partnership>

An internet (virtual) network of tourism businesses from Outback Australia, developed and coordinated under a 3 year Federal Government program (funding was due to run out in March 2012). At the time of writing the future of the program and the network is unclear.

A key initiative developed under the program is the **station stays SA network** which has membership of Gawler Ranges, Outback and Flinders Ranges station stay operators; see www.stationstays.com.au

In addition, the **Our Outback Tourism Partnership** was an initiative which aimed to focus on:

Quote

*Building reputation
Enhancing research and statistics
Encouraging sustainability
Lifting capability
Improving access
Increasing collaboration*

The Our Outback Tourism Partnership draws together key tourism organisations to work together to implement the project and consists of representatives from:

*Australia's Golden Outback
Desert Knowledge Australia
Outback Queensland Tourism Association
Outback Regional Tourism Organisation
South Australian Tourism Commission
South Australian Regional Tourism Organisations
Tourism Australia
Tourism Central Australia
Tourism NSW
Tourism NT
Tourism Queensland
Tourism WA*

Unquote

APPENDIX B – Tourism Research Australia Regional Tourism Profile – Outback SA Region 2009/2010

Provided as separate electronic file

APPENDIX C – Tourism Research Australia Outback Data (Feb. 2012)

Provided as separate electronic file